**aNNEXURE A2: Bidder TECHNICAL Compliance Checklist**

**BIDDERS NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Example of how to complete the compliance checklist:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Section**  **No.** | **Technical Criteria** | **Compliant** | **Partially Compliant** | **Non -Compliant** | **Reference page in Proposal** | **Comments** |
| 8.3.1 | Summary of the bidder’s experience in implementation | **EXAMPLE** |  |  | Pg. |  |
| 8.3.2 | Detailed approach on how the project will be executed |  |  |  | Pg. | Bidder to state reason for partial compliance |
| 8.3.3 | Provide a 1-2 page resume and certificates of each resource |  |  |  | Pg. | Bidder to state reason for non-compliance |

**Please refer to section 9 to complete this form. The form must be submitted in File 1, Exhibit 2**

| **No.** | **Technical Evaluation Criterion** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference page in Proposal** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- |
| **1.** | **Company Profile, Infrastructure and Resources** |  |  |  |  |  |
| **1.1** | The service provider have submitted in their response:  • The Institutions profile detailing the number of years in delivering training on the knowledge and practical skills components of the Tax Technician Qualification. The profile must also include but not limited to: staff compliment (including lecturers and course convener(s) for the qualification. |  |  |  |  |  |
| **1.2** | The service provider have submitted:  • The Institution's infrastructure to deliver training e.g. Ms Teams, WebEx or Zoom. |  |  |  |  |  |
| **1.3** | The service provider have demonstrated the assigned Facilitators or Lecturers accessibility to the following:  • Laptop or tablet  • cell phone and  • Access to the internet. |  |  |  |  |  |
| **1.4** | The service provider has provided a One (1) page Curriculum Vitae (CV) indicating the level of expertise of Key Personnel that will be assigned to SARS. Each CV should include: level of expertise, number of years of experience, their accessibility, qualifications and competencies relevant to the scope of services. |  |  |  |  |  |
| **1.5** | The service provider has provided the Full name and contact details (landline, cell-phone and email address) of a Key Account Manager with technical expertise that the bidder recommends to SARS. Please elaborate on how the Key Account Manager played a key role in at least two (2) projects similar to the scope of work of this bid. |  |  |  |  |  |
| **2.** | **Resources** |  |  |  |  |  |
| **2.1** | The service provider have submitted information on the following:  • One (1) page Curriculum Vitae (CV) indicating the level of expertise of the facilitators/ Assessors that will be delivering training on the knowledge and practical skills components.  • The proposed Facilitators and Assessors must have a recognised NQF level 8 qualification in the field of taxation/accounting/audit.  • A minimum of five (5) years’ experience in the subjects listed in the Tax Technician curriculum document.  • Membership in good standing with a professional body in the field of taxation/accounting/audit.  **NB: The service provider to attach the certified copies of NQF level 8 qualification on taxation/accounting/audit.** |  |  |  |  |  |
|  | The service provider have submitted:  • Full contact details (landline, cell-phone and email address) of a Key Account Manager, who will be assigned to SARS including:  - His/her role and responsibilities when the services are rendered to SARS;-  - A minimum of five (5) years of experience as a Key Account Manager; and  - One page CV, containing his/her qualifications (certified copies of certificates). |  |  |  |  |  |
| **3.** | **Learner Selection** |  |  |  |  |  |
| **3.1** | The service provider have demonstrated by providing screenshots of the following:  • The online learner application system that will ensure all applicants are subjected to screening and assessment process required to shortlist and select final list of suitable candidates for entry into the qualification.  • The ability to submit detailed screening and/or assessments reports to SARS.  • The ability of the online learner application system to accommodate one hundred (100) delegates to be selected for enrolment. |  |  |  |  |  |
| **4.** | **Online Student Support Portal** |  |  |  |  |  |
| **4.1** | The service provider have submitted evidence of:  An online student support portal where all successful applicants, up to one hundred (100) will have access to.  - The portal that is capable of making learning resources, (e.g. learning material, additional learning/reference material and lesson or additional explanatory recordings, communications, etc.) accessible to learners. |  |  |  |  |  |
| **5.** | **Layout of the Tax Technician Qualification Curriculum** |  |  |  |  |  |
| **5.1** | The service provider have submitted a layout of the following six (6) knowledge components which they will provide academic support for and in line with the tax technician qualification curriculum:  Deliver training on the following knowledge modules as listed below:  • General Tax Fundamentals, NQF Level 6, Credits 48;  • Personal Income Taxation, NQF Level 6, Credits 24;  • Employment Payroll Taxation, NQF Level 5, Credits 16;  • Corporate Income Taxation, NQF Level 5, Credits 24;  • Value-added Tax, NQF Level 5, Credits 32; and  • Tax Administration and Practice Management, NQF Level 5, Credits 16. |  |  |  |  |  |
| **5.2** | The service provider have submitted a layout of the following four (4) practical skills components which they will provide academic support for and in line with the tax technician curriculum qualification:  Deliver training on the following practical skills modules as listed below:  • Compliance, Ancillary Explanations and Revenue Authority / Taxpayer Engagement Related to Personal Income Taxation, NQF Level 6, Credits 60;  • Compliance, Ancillary Explanations and Revenue Authority / Taxpayer Engagement Related to Employment Payroll Tax Returns, NQF Level 5, Credits 20;  • Compliance, Ancillary Explanations and Revenue Authority / Taxpayer Engagement Related to Corporate Income Taxation, NQF Level 6, Credits 60; and  • Compliance, Ancillary Explanations and Revenue Authority Engagement / Taxpayer Related to Value-Added Taxation, NQF Level 5, Credits 60. |  |  |  |  |  |
| **6.** | **Initial Test of Competence** |  |  |  |  |  |
| **6.1** | • The service provider must explain how they will ensure that all delegates/ students subjected to a preparatory course are adequately prepared for the initial test of competence (ITC); and  • Conduct/administer the initial test of competence (ITC). |  |  |  |  |  |
| **7.** | **Supervisor Training** |  |  |  |  |  |
| **7.1** | • The service provider should submit a training plan for the supervisors, propose the number of hours that the nominated supervisors should commit and outline their roles and responsibility in ensuring that logbooks are completed in line with the curriculum document. |  |  |  |  |  |
| **8.** | **External Integrated Summative Assessment** |  |  |  |  |  |
| **8.1** | The service provider should explain the process they will follow to ensure that all delegates who were found competent on the ITC have completed their logbooks and are adequately prepared for the EISA. |  |  |  |  |  |
| **9.** | **Liaison with SAIT** |  |  |  |  |  |
| **9.1** | • The service provider should explain how they will act as liaison between SARS and the SAIT with respect to the selection of a sample of logbooks which must be assessed by the SAIT for compliance with the QCTO standards.  • The Service provider should explain how they will facilitate the registration of delegates with the SAIT for the EISA. |  |  |  |  |  |
| **10.** | **Methodology and Approach** |  |  |  |  |  |
| **10.1** | The service provider have submitted information on how they will launch orientation for the academic programme will be conducted including but not limited to:  • Qualifications objectives;  • Criteria;  • Method of assessment; and  • Relevant information to the nominated SARS delegates. |  |  |  |  |  |
| **10.2** | The service provider have submitted:  A high-level delivery plan that clearly outlines the following:  • The deliverables including reporting, facilitators/assessors and the timelines for the delivery of the training.  • All SARS’s key requirements/ Activities as outlined in paragraph 9.3.1 & 9.3.10. |  |  |  |  |  |
| **11.** | **Recognition of Prior Learning (RPL)** |  |  |  |  |  |
| **11.1** | • The service provider should submit the RPL policy and demonstrate through an explanation of how the RPL of identified students, taking into account their number of years of experience and previous qualifications, will be conducted. |  |  |  |  |  |
| **12.** | **Testimonials** |  |  |  |  |  |
| **12.1** | The service provider have submitted three (3) testimonial letters from current/recent clients/individuals, (not older than 5 years) to whom the delivery of the knowledge and practical skills component of the Tax Technician Qualification were rendered.  The testimonial letters must be on a company letter head if an organisation was serviced or without a letter head if an individual was serviced and include but not be limited to:  - Company name/ individual name/ Company representative name:  - Address, phone number;  - Duration of the contract;  - A brief description of the services; and  - Level of customer satisfaction.  **NB: Please note that SARS will contact the clients for reference check. Bidders must ensure that the client contact provided is contactable.** |  |  |  |  |  |