

	RFP 02/2022: APPOINTMENT OF A VAT REFUND ADMINISTRATOR				
	ANNEXURE A3(A) - DESKTOP EVALUATION SCORECARD				
#		WEIGHT	GUIDELINE	SCORE	COMMENTS
1	Company Profile	3.00			
1.1	<p>The bidder has provided in their response:</p> <p>The company profile and organisation structure of the team that will administer VAT Refunds on Exported goods.</p>	3.00	<ul style="list-style-type: none"> • 3 = The bidder has provided their company profile and organisation structure of the team that will administer VAT Refunds on Exported goods • 1 = The bidder has provided only company profile or organisation structure provided • 0 = No information provided 		
2	Resources	10.00			
2.1	<p>The bidder has provided resources including:</p> <ul style="list-style-type: none"> • A minimum of five (5) support staff that will be assigned to SARS, including technical support to attend to emails enquiries and system support in respect of VAT Refunds Administration. The bidder has provided a CV of each support staff which include but not limited to: <ul style="list-style-type: none"> - His/her roles and responsibilities; - Experience in processing claims and payments, managing risk, customer service,data capturing and technical support; - Qualifications (Matric and other qualification/s e.g. Finance, Accounting, IT, Data Capturing, Operational Risk or Auditing or equivalent) and provide a certified copy of each qualification. Key Account Manager: <ul style="list-style-type: none"> • The bidder's full contact details (email & telephone number) of a Key Account Manager, who will be assigned to SARS including: <ul style="list-style-type: none"> - His/her role and responsibilities when the VAT Refund Administration services are rendered to SARS - His/her should have a minimum of four (4) years relevant experience; - His/her qualifications (Matric and other qualification/s e.g. Finance, Accounting, IT, Data Capturing, Operational Risk or Auditing or equivalent) and provide certified copy of each qualification); and: - His/her CV. 	6.00	<p>The bidder has provided a minimum of five (5) support staff that will be assigned to SARS, including technical supports to attend to emails enquiries and system support in respect of VAT Refunds Administration.</p> <p>The bidder has provided CV of each support staff which include but not limited to:</p> <ul style="list-style-type: none"> • Roles and responsibilities • Experience in processing claims and payments, managing risk, customer service,data capturing and technical support • Qualifications (Matric and Qualification e.g. Finance, Accounting, IT, Data Capturing, Operational Risk or Auditing or equivalent) and provide a certified copy of each qualification <p>6 = If the bidder provided 5 staff that meet full requirements, 4= If only 4 staff meet full requirements, 3= If only 3 staff meet full requirements, 2= If only 2 staff meet full requirements, 1= If only 1 staff meet full requirements 0 = No information provided , Experience irrelevant, Qualification irrelevant.</p>		
		4.00	<ul style="list-style-type: none"> • 4= The bidder has provided a key personnel / account manager's full contact details (email and telephone numbers) = (1), roles & responsibilities = (1), minimum of four (4) years' relevant experience = (1), Certified copies of qualifications related to project management or equivalent and CV attached = (1). • 0 = No information provided ,less than four years experience as a key account manager, Qualification not related to Project Management or equivalent 		
3	Document Management and Record Keeping	14.00			
3.1	<p>The bidder has provided information demonstrating how document management process will be done including but not limited to:</p> <ul style="list-style-type: none"> • The planning and organising of how electronic as well as paper-based claims will be stored and maintained safely for a period of five (5) years and facilitation of record hand over at the end of the contract; • Security and disposal of records and managing all records efficient and effective; and • Quality measures in place to ensure data security, reliability, and validity of data. 	14.00	<p>Bidder has provided information demonstrating document management process will be done including but not limited to:</p> <ul style="list-style-type: none"> • 5 = A detailed description which entails (Planning = 1 and Organising = 1) of how electronic, as well as paper-based claims will be stored and maintained safely over a period of five (5) =1 and facilitation of record hand-over at the end of the contract = 2. • 5 = A detailed description which entails security = 1, disposal of records = 1 and management of all files efficient and effective = 3. • 4 = Quality measures in place to ensure data security = 1, reliability = 1, and validity of data =2. • 0 = No information provided 		
4	Testimonials	9.00			
4.1	<p>The bidder submitted a completed testimonial template (Annexure A4):</p> <p>a) Bidder has provided 3 recent testimonials from a minimum of three (3) recent clients (not older than 3 years) where claims administration services were rendered related to Tax or Finance</p> <p>The testimonial must include the following information for each client:</p> <ul style="list-style-type: none"> • Client name; • The client's contact person and phone number; • Contract period; • Description of the services; • Level of satisfaction; and • Quality of the service rendered <p>The three (3) testimonials must be on a company's letterhead or authenticated by a company stamp</p> <p>Bidder has provided Challenges and Lessons learnt separately per testimonial and has indicated how they overcame the challenges</p>	3.00	<p>Bidder has provided 3 recent testimonials from recent clients (not older than 3 years) where claims administration services were rendered to Tax or Finance. The testimonials must include but not limited to:</p> <p>NB: one (1) point for each 3 recent testimonials, with</p> <ol style="list-style-type: none"> 1. Company name, contact person name and designation, phone number, email address and duration of contract (not evaluated but should be provided) 2. A brief description of the services rendered (service should be aligned to the RFP document) (not evaluated but should be provided) 3. Level of satisfaction 4. Quality of the service rendered <p>NB: If description of the service is not aligned to the RFP document bidder will get 0 points on the specific letter</p>		
		6.00	<p>Bidder has provided Challenges and Lessons learnt separately per testimonial and has indicated how they overcame the challenges = 2 point for each client</p> <p>No response = 0</p>		
5	Location	10.00			
5.1	<p>The bidder has provided a letter/s of intent to rent offices or proof of ownership of the offices in the following Ports of Exit where it should be present.</p> <ul style="list-style-type: none"> • O.R Tambo International Airport; • Cape Town International Airport and King Shaka International Airport. 	10.00	<ul style="list-style-type: none"> •The bidder has provided letter of intent to rent offices or proof of ownership for the offices in the Port of Exit (O.R Tambo International Airport, Cape Town International Airport and King Shaka International Airport = 10 • 0 = No letter of intent submitted or proof of ownership, No information provided 		
5.2	<p>The bidder has provided letter/s of intent to have accessible remote offices within the proximity of the borders for all other designated Ports of exit to the following countries where qualifying purchasers will be able to submit VAT refund claims:</p> <ul style="list-style-type: none"> • Zimbabwe (Beitbridge Border); • Mozambique (Lebombo Border); • Botswana (Grobler's bridge ,Ficksburg bridge, Kopfontein, Ramatlabama, Skilpadhek); • Namibia (Vroolsdrift, Nakop); • Lesotho (Ficksburg bridge, Caledonspoor, Maseru Bridge, Qacha's Nek, Van Rooyens Gate); and • eSwatini (Oshoek, Mahamba, Nerston, Golela, Jeppes Reef, Mananga). 		<ul style="list-style-type: none"> •10= The bidder has provided proof of intent to have easily accessible remote offices within the proximity of the borders for all other designated Ports of exit to the following countries where qualifying purchasers will be able to submit VAT refund claims: <ul style="list-style-type: none"> • Zimbabwe • Mozambique • Botswana • Namibia • Lesotho • eSwatini • 0 = No proof provided or No information provided 		
TOTAL		46.00			