



**CREDO BUSINESS COLLEGE**

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408 Lynnwood Street  
Lynnwood  
PRETORIA 0081

2 October 2018

**CREDO BUSINESS COLLEGE PTY (LTD)**

**COMPANY REGISTRATION NR: 2004/032319/07 | VAT NR: 4870256981 | INCOME TAX NR: 9418/115/16/9**

Credo Business College (Credo) is a private training college, specialising in the field of business and financial training. The college provides education and training in line with the government's National Skills Development Strategy and supports national and sectional growth, development, and equity principles.

Our purpose is to provide training (both theoretical and practical) that ensures employees are adequately equipped to meet the requirements of their current positions and that they grow professionally. Credo's intention is to develop a skilled, competent, and confident workforce through training interventions that equip and enhance the growth of our learners, their employers, and society. We aim to achieve this through:

- nationally recognised and accredited learning programmes;
- needs analysis;
- improved skills and work performance.

Credo has been actively involved in the South African educational training and skills development landscape for many years, first trading as LH Education and later as Oxbridge Training Institute. In this way, Credo Business College has been involved in funded and private training projects since 2008, and we have vast experience in training projects done in collaboration with emerging / venture partners. All our projects have been successfully concluded within the given timelines and budgets and have achieved the contracted project outcomes. We can ascribe this to careful planning, close monitoring, and taking corrective measures as soon as possible.

Credo's General Manager, Ronel de Kock, was part of the development of the Occupational Certificate: Tax Professional, and successfully registered the Qualification with the Quality Council of Trades and Occupations (QCTO) and subsequently the Learnership with the Department of Higher Education and Training (DHET). She was the Learner Facilitator as the Development Quality Partner (DQP) for the Occupational Certificate: Tax Technician and successfully developed, implemented and registered the Qualification and Learnership.

Credo is a QCTO accredited skills provider:

Occupational Certificate: Tax Technician QCTO: SDP/16/0106

In support of Credo's vision of "**Professionals in Training**", we have over the years realised that the ideal in any post-school training is to ensure that the learner is placed on a career path that would lead to an occupation and, preferably, a professional designation. To support its vision Credo has an experienced facilitation and assessment team that will form part of this project. Credo is

also known for its dedication to detail, ensuring that quality requirements will be met and to provide learner-centered support as part of their brand.

Our **training approach** is based on the commitment to do whatever we can to assist our learners to be successful in obtaining the qualification. Our approach stretches further than just the transfer of theoretical knowledge, with the aim that our learners will be able to apply their knowledge and skills in their respective workplaces.

Credo is one of only two accredited providers in the tax technician field. Credo are however the only provider that has rolled out the qualification in previous years. We have learners enrolled on our one year bridging programme as well as on our two year detailed qualification programme. Based on this well-developed programme, Credo has been awarded a contract with the South African Revenue Services (SARS) to train 85 SARS employees on the qualification over the next 2 years. Credo furthermore collaborates with Universities and Universities of Technology to instill awareness of the tax technician profession to relevant students. Credo is also in discussions with employees to ensure an awareness and demand for learners that have completed the qualification and thus are able to adhere to tax compliance.

We wish to support SAIT in this endeavour with the belief that our services will add value to SAIT's identified *at-risk* tax practitioners. All current SAIT members on Tax Technician membership level with highest qualification on NQF4 will have to upskill themselves to comply with the legislative requirements to maintain their current registration status.

Should you require any further information, please do not hesitate to contact me.

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**Ronel de Kock CA(SA) MCom (SA & Int Taxation)**

**General Manager: Credo Business College**

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## 1. OVERVIEW OF PROPOSED PROGRAMME

The objective is the completion of the QCTO Occupational Certificate: Tax Technician, by upskilling the SAITs' Tax Practitioner members, from an NQF 4 to NQF 6 qualification, as required by the SARS Criteria for the Recognition of Controlling Bodies. This will ensure the retention of the Tax Practitioners member SARS practitioner number and ensure adherence to legislation.

The SAIT's members will be offered a taxation academic bridging programme with the aim of providing a bridge between the members' current knowledge and the level of knowledge and practical skills that are needed to complete the professional qualification.

This programme is an exciting alternative articulation in developing a pathway for SAIT's members to a professional qualification by building on the Members' current knowledge and thus finding an accelerated professional route in the shortest time possible by combining a taxation academic bridging programme and work experience. This will lead to members obtaining the Occupational Certificate: Tax Technician (NQF 6).

The Occupational Certificate: Tax Technician consists of 3 components:

- 1) Knowledge
- 2) Practical Skills
- 3) Workplace Experience

There are two examinations that Members need to pass prior to obtaining the qualification:

- 1) Initial Test of Competence (ITC) which is part of the academic bridging programme as assessed by Credo; and
- 2) External Integrated Summative Assessment (EISA) after successful completion of the three (3) components as assessed by SAIT, the Assessment Quality Partner (AQP).

This programme consists of:

- an online taxation bridging programme, consisting of both the Knowledge and Practical Skills Modules
- a Workplace Experience Programme as per Credo's Business Training Solutions, consisting of a mentorship programme, completion of a Portfolio of Evidence (PoE) which consist of a logbook and / or RPL Assessment Case Studies where applicable
- preparation courses for both the ITC and EISA examinations
- Credo ITC examination

### ***Online Taxation Bridging Programme***

This is a 9-month programme covering the following main four tax areas:

- Income Tax
- Individual Tax
- VAT
- Employment Tax

The programme is offered as a distance learning programme via Credo's online learning facility.

The online platform is designed to be mobile / tablet-first and completely responsive, as more of the busy Members choose these devices to work on the move. Studying online is a great way to gain a qualification while still being able to work, parent, or juggle the many commitments that define most adult lives. Members have 24/7 access to a huge range of resources to aid their learning. These include:

- Dedicated tutor support via email and online
- E-books, interactive quizzes and self –assessment tests
- Lecture notes
- Online chat box for Tutor contact
- Personalised study plans
- Assignment submission and feedback reviews
- Regular learning checks and practice assessments
- Tutor dashboard - so Tutors can see where every member is in their course, reach out to members who are struggling and suggest what areas may need a revision class.

There will be continuous formal online assessments covering each main topic.

In addition, Credo will provide four (4) non-compulsory face-to-face workshops during the duration of the programme in three (3) regions where there is a concentration of members.

The following topics will be covered during these workshops:

- Tax payer registration
- SARS e-filing
- Completion of the ITR12 of various taxpayers
- Payroll taxes
- Taxation of small business
- Completing the ITR14
- Completion of VAT 201
- Objections

These workshops will also be sent online to the Members. The members who cannot attend, either due to work related obligations or because of distance, will be able to access the information. Members will be able to communicate with their assigned facilitators regarding understanding and application.

### ***Summative assessment***

The Bridging Programme will run concurrently from February 2019 to October 2019. At the beginning of November 2019, the members will receive a 3-day preparation course to prepare the members sufficiently for the Credo's summative Initial Test of Competence (ITC). This is a very important part of the programme, as the members need to be trained in exam techniques as these

members have not studied or written exams for many years. This preparation course will be offered face-to-face as well as online.

The members will write the Credo's ITC on 16 November 2019. The members need to achieve a pass mark of 50% to be viewed as competent. A supplementary ITC will be available on 30 November 2019.

SAIT accepts Credo's Statement of Results as Credo is an accredited provider of the Occupational Certificate: Tax Technician.

### ***Workplace Programme***

All the Members enrolled onto the project are in employment in the tax environment. The Members will compile a Portfolio of Evidence (PoE). They will be supported by Credo mentors, who are all tax specialists, in the completion of their PoE's. Where Members are not exposed to all the tax

fields in their own work environment, they will be assisted by Credo with RPL Assessment Case Studies to achieve competence in the completion of the PoE.

Credo has sufficient SAIT accredited assessors to assess the PoE's. The assessor reports will be submitted to SAIT for moderation and final evaluation on 3 December 2019.

### ***Final Summative Assessment: SAIT External Integrated Summative Assessment (EISA)***

The Members who pass the ITC (50% pass mark) will have successfully complied with the first two components of the Occupational Certificate: Tax Technician, namely the Knowledge and Practical Skills Components.

The Members that do not pass the ITC the first time round, will receive additional support from the assigned mentors, and will obtain a second opportunity to rewrite the ITC on 30 November 2019.

After successful completion of all 3 components, Members can submit their statement of results and apply to write the SAIT EISA on 13 January 2020.

A second preparation course will be presented early in January 2020 by Credo for preparation purposes for the EISA, set by SAIT.

After passing the EISA, the Members will obtain the Occupational Certificate: Tax Technician (NQF level 6, SAQA ID 94098, credits: 399) and hereby retaining their professional designation Tax Technician (SA) with SAIT and tax practitioner number with SARS.

### ***Member support and Mentorship strategy***

Credo will use mentoring as a process to build a relationship, which gives the mentor an opportunity to share their professional and personal skills and experiences and to, through the process of sharing provide the SAIT Members with a safe space in which they can explore, grow and develop. Typically, it is a one-to-one relationship between a more experienced and a less experienced

person; it can, however, also work in a group. It is based upon encouragement, constructive comments, openness, mutual trust, respect and a willingness to learn and share.

Credo will assign mentors to the programme. Members will be allocated to these mentors. The mentors will communicate electronically and telephonically with the Members.

Part of the monitoring strategy is to evaluate the individual Members on a monthly basis in terms of their meeting the various milestones. On the Members database the member is classified as low risk, medium risk or high risk according to set criteria. SAIT Members identified as high-risk will get immediate attention of which personal mentoring will be a part. It gives one an immediate understanding of how the learners are doing. The mentors will be contracted for the duration of the project and be available till the end of the learning period.

We are focused on our learners' (Members) needs, which is in line with our learner support and we are, therefore, flexible to adapt the mentorship programme to suit the specific needs of the Members involved in the project.

Mentoring will be a strategy throughout the Offering. Both mentoring and coaching will be used as tools in the field of people development. While both utilise many of the same skills, being a mentor implies some specific knowledge or wisdom that helps guide the protégé's development. Coaching, on the other hand, is more about bringing an objective process to help someone articulate and achieve his / her goals. Mentoring, on the other hand, can help SAIT Members navigate organisational culture, solve problems and advance their development.

Credo will assign mentors to the programme in the ratio of 25:1. These mentors will be continuously accessible through the Credo's electronic learning facility and available in person at the pre-scheduled voluntary face-to-face workshops throughout the period. Communal issues will be discussed, building up trust and openness so that the group also start to feel responsibility for the growth of the group. The mentor will also meet the SAIT members individually if so requested.

#### *Workplace mentorship programme*

The *workplace mentorship programme* focused on assisting the learners compiling their logbooks, practical case studies and workshops to enable them to successfully completed the workplace component of the qualification.

An agreement with the members's workplace is reached that the Credo assigned mentor can be contacted if and when a mentor be needed to meet with the member. The mentors will be contracted for the duration of the programme and will be available till the end of the tracking period.

The mentors are highly qualified, mostly CA(SA)'s with Master in Taxation and years of work experience. They are all SAIT accredited assessors. After completion of the PoE, a final review is done and PoE's are submitted to SAIT with an assessors' report. It is important to note that all client information should be treated as highly confidential. It is not necessary for the learner to



remove client names or other confidential information from the documents. The SAIT assessor is registered with one of the Controlling Professional Bodies (e.g. SAIT, SAICA, etc.) and is also a registered Tax Practitioner. The SAIT assessor will treat all client information as confidential and may not remove any evidence from the POE.

Files will be moderated by a SAIT accredited moderator on a sample basis.

Both the academic and workplace mentorship programmes are done via Credo’s online learning facility, supporting learners across the country.

*Online study groups* of between 20 and 25 SAIT Members per group will be established. It is important that a non-threatening environment is established where SAIT Members feel comfortable to make mistakes, to ask questions and to grow their knowledge. As group cohesion develops, trust is established. SAIT Members participate actively in the small groups by working out questions on the content discussed during the tutorial sessions. These assignments are marked by the facilitator and detail discussion of the assignment is recorded and posted on the Credo online learning facility. Gaps in individual SAIT Members’ knowledge base are immediately identified and addressed. This builds the SAIT Member’s confidence and it is therefore greatly motivational. Both SAIT Members and tutors/facilitators must be committed to the programme.

### 1.1 PROGRAMME OFFERING PLAN

In summary, Credo’s programme offering will start in January 2019 and be concluded at the end of March 2020.

Milestone	Timeline	Objective
Taxation Bridging Course	February to October 2019	Course completed successfully
Logbook PoE	February to November 2019	Logbook completed and submitted
Logbook submitted to SAIT	2 December 2019	SAIT to assess
Preparation Course for ITC	November 2019	Completed course
ITC Assessment	16 November 2019	Completed Assessment
ITC Results	November 2019	Results made available to all members
ITC Supplementary Assessment	30 November 2019	Completed Assessment
Logbook assessed by SAIT	13 December 2019	SAIT assessed and results available
Preparatory 3 day course	January 2020	Online



SAIT Tax Technician External Integrated Summative Assessment	13 January 2020	Members who pass ITC and whose PoE were accepted by SAIT can write
Results	March 2020	SAIT makes results available

## 2. PROGRAMME OFFERING COSTING

This distance learning programme via Credo's online learning facility is R29 950 (inclusive of VAT).

The costs include:

- an online taxation bridging programme, consisting of both the Knowledge and Practical Skills Modules
- a Workplace Experience Programme as per Credo's Business Training Solutions, consisting of a mentorship programme, completion of a Portfolio of Evidence (PoE) which consist of a logbook and / or RPL Assessment Case Studies where applicable
- preparation courses for both the ITC and EISA examinations
- Credo ITC examination

At Credo, one can pay for this offering in affordable monthly instalments. For the duration of this proposed programme, running from February 2019 – January 2020, monthly instalments are R2 495.

**REGISTRATION FORM:  
TAX TECHNICIAN QUALIFICATION (NQF LEVEL 6)  
SECTION 1: PERSONAL INFORMATION**

Personal Information												
Title:	Mr			Mrs			Miss		Ms			
Full Name(s):												
Surname:												
Date of Birth (day/month/year):                                 /                                 /												
Identification Number:												
Passport Number:												
Nationality:												
Citizen Status:												
Home Language:												
Second and or other language(s):												
Gender:	Male					Female						
Demographic background:	Black African					Coloured						
White			Indian						Other			
Disabilities (please specify):												
Physical Address												
No:	Street:					Suburb:						
Town:				Province:					Area Code:			
Rural:						Urban:						

Postal Address			
P.O Box:		Suburb/City:	
Town:	Province:	Area Code:	

Contact Information			
Tel – Home: ( ) -	Tel – Work: ( ) -		
Facsimile: ( ) -	Cell Phone: ( ) -		
E-mail Address (Personal):			
E-mail Address (Work):			
Alternative E-mail Address (if applicable):			

Academic History: Secondary Education			
High School name:			
Highest grade/standard completed:			
Year (From):		Year (To):	
Academic History: Tertiary Education			
Tertiary Institution name:			
Qualification Achieved/In Progress:			
Year (From):		Year (To):	

Employment Information: Current			
Name of Employer:			
Job Title:		Department:	
Address:		Suburb:	
Town:	Province:	Area Code:	
Date of Employment:	Year From:	Year To:	
Employment Information: Previous			
Name of Employer:			
Job Title:		Department:	
Date of Employment:	Year From:	Year To:	

**SECTION 2: INVOICE DETAIL**

Description	Information
Customer name (e.g XY Company (Pty) Ltd)	
Name of contact person	
Customer VAT number	
Customer's physical or postal address	

Payment Plan	
Kindly indicate (x) which payment plan will suit you best.	
R29 950 in full upfront	
R2 495 Monthly payments in advance (over 12 months)	