



SAICA CEO ROADSHOW
South Africa / EMEA
12 April 2023



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The questions below were raised by members before the CEO roadshow for members residing in South Africa or EMEA, scheduled to take place on 12 April 2023.

MEMBER VALUE

- 1. Are there any plans to have Reciprocal Membership Agreements (RMA) or Mutual Recognition Agreements (MRA) for the AGA(SA) designation with other accounting bodies both in South Africa and abroad? The example being the agreements that SAIPA currently has with overseas bodies.**

SAICA approved a policy for the recognition of other professional bodies for AGAs and ATs in December 2022. SAICA will now be able to take more proactive action in seeking out countries with whom we can enter into reciprocity agreements for both the AGA and AT designations.

- 2. How is SAICA assisting newly qualified CAs(SA) to be employable and relevant in the market, especially in strategic positions or decision-making bodies? I have qualified as a CA(SA) in the Eastern Cape and it has been more than a year of trying to get a job or to serve on a board.**

SAICA continues to enhance the competencies that CAs(SA) need to remain relevant and make an impact in the marketplace. CA2025 ensures that newly qualified CAs who enter the workplace can demonstrate relevant skills in a meaningful manner.

After qualifying as a CA(SA), gaining appropriate work experience and entrenching relevant competencies to support their chosen career path will strengthen the chances of obtaining a senior position and the prospect of serving on boards.

- 3. How would you motivate CAs(SA) to stay in South Africa given the current environment in the country?**

CAs(SA) are trained to promote accountability and transparency, which is important for promoting trust in financial systems and preventing fraud and corruption. CAs(SA) provide expertise in financial management, accounting, and auditing, which promotes informed decision-making and assists businesses to grow. CAs(SA) also play a crucial role in the financial sector, managing complex transactions, providing financial advice and ensuring compliance with regulations.

As such, CAs(SA) are crucial to the success of South Africa, and have an incredible opportunity to make a significant difference here.

It must be noted though, that individual members choose where they want to work, and thanks to the global relevance of the CA(SA) designation, SAICA cannot prevent members from moving abroad to gain international experience.

- 4. If SAPS tackled criminals with the same aggression that SARS is tackling taxpayers, then we would have very little crime. However, SARS is taking it too far, and possibly behaving in a criminal manner themselves by blatantly disregarding taxpayer submissions, disallowing expenses with no good reason, and withholding refunds. It feels like an attack on the hands that feed the country. It is crippling taxpayers in business and I believe it is unconstitutional. I for one see no future as a small tax practitioner in the**



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current SARS environment and I cannot encourage anyone who wants to be a practitioner to do so because SARS is making it impossible for us to resolve matters.

SAICA shares the view of members that regulation of the tax profession should be about its sustainability and not just a “stick to beat tax practitioners” with. The existence of the tax profession and the services that it delivers is, in our view, in the public interest.

As a Registered Controlling Body (RCB), SAICA is in continuous conversation with SARS through various channels, both operationally and from an advocacy perspective. SAICA continuously advocates for member needs while also balancing member interest with that of the public interest.

The “hardhandedness” that SARS applies to compliant taxpayers is something that SAICA continually advocates against as it undermines SARS’ own strategy. It is something the current SARS Commissioner had noted himself when he began his term, and he undertook to address the matter. It is noted that this is a global phenomenon and similar complaints are seen in the USA, UK and Australia. It is also a reflection of the additional pressure Revenue Services have been placed under to ensure global fiscal sustainability in a decade of tax revenue shocks since the 2007 financial crisis where significantly expanded public spending has been the primary countermeasure.

In this regard SAICA and its National Tax Committee have continued to advocate for:

- The full integration of tax practitioners into all the processes within the Tax Administration Act to ensure rights become enforceable against SARS and third parties just like it is in the legal profession
- More unique and exclusive services that only tax practitioners can provide to members of the public
- The protection of the tax practitioners’ market from unregistered tax practitioners and those who render primary tax services under the cloak of ancillary or incidental services
- Separation of the Tax Ombud from SARS and more powers to the Office of the Tax Ombud to make cost determinations against SARS, similar to the Taxpayer Advocate in the USA
- Reducing the cost of tax administration on taxpayers and tax practitioners especially where such costs are wasteful due to SARS conduct and processes, for example, requesting the same documents multiple times; requiring clients to accompany tax practitioners to branches for certain services; or diverting SARS system error matters to the tax dispute channel.

- 5. Will SAICA ever consider embarking on a process, not with an enquiry to members but with an official stance, that SAICA will participate in action against the state when sufficient evidence is accumulated? The time has come for someone to do this because enough is enough of diplomacy because it yields no tangible results. People are putting our services on hold and taking matters into their own hands by not submitting with the attitude that “SARS is not acting in good faith so why should we?” It is a real problem that I believe SAICA should not push to one side any longer. It can be compared to oppression, and we should take a stand to protect the public from a rogue revenue collection system.**

SAICA continuously engages with SARS, including engagements with the commissioner where the activities of SARS and its impact on members and the great fiscus are concerned. In addition, our budgetary submissions and proposals regularly focus on issues that can be resolved to alleviate pressure on the public and on members including solutions of where budgets could and should be allocated.

With that said, SAICA will always seek collaboration and engagement as the first step in resolving any complex problem. This may require significant evidence gathering to prove the existence of a systemic problem, which SAICA also does with the help of its members. However, we do recognise that it may not always be possible to resolve matters by this process alone.

In this regard there are other entities who, in terms of the Constitution and the law, are tasked with oversight and governance of SARS including:

- The SARS Commissioner
- The National Treasury
- The Parliament of South Africa
- The Office of the Tax Ombud
- The Public Protector
- Commissions of Inquiry (e.g., The Nugent Commission where SAICA testified)

SAICA has previously and will continue to escalate matters to these oversight bodies once we have exhausted our remedies with SARS management. The last resort is to approach the Courts to compel SARS to correct its conduct.

Regarding the possibility of SAICA's participation in acting against the state on behalf of members, the National Tax Committee in 2019 already initiated such an enquiry as it related to audits and verifications and, following management approval, a first senior counsel opinion was obtained in 2021. A second opinion was commissioned and approved by SAICA management in 2023 to further clarify and validate matters raised in the first opinion. The outcome of this will be shared with members in due course.

However, SAICA would like to emphasise that litigation will always be the last resort and members should not believe that litigation is a silver bullet in resolving matters for either SARS officials' conduct or processes or law that is seemingly inherently problematic. SAICA members should also acknowledge that the challenges SARS faces are in fact real. As much as their response may be incorrect, globally revenue services face the same challenges.

6. Please clarify SAICA's future attitude to SARS' unacceptable service, and highhanded unilateral illegal/unethical actions and how SAICA will support SAICA member tax practitioners to obtain adequate remedies to their many continuing of these problems with SARS. The reason for this question is that indications by SAICA give the impression that SAICA is reconsidering its function and its role vis a vis its members and SARS.

SAICA's members have, through its approved Constitution, given it a mandate and imposed an obligation that SAICA has to promote the common interest of members, including ensuring members have adequate remedies to resolve matters on their own or through the collective membership of SAICA. SAICA members have also collectively imposed a concomitant obligation for SAICA and its members to act in the public interest.

In this regard SAICA will:

- Support members through stakeholder facilitation (e.g. escalations)
- Empower members with knowledge of particular processes and self-help (e.g. Rule 52 & 56 applications guide)
- Advocate on their behalf to various stakeholders and in support of members
- Take necessary actions including legal action where required



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To this extent, SAICA is not reconsidering its role vis a vis members and SARS but rather SAICA has expressed concern that SARS and regulators/standard setters, in general, are increasingly changing the legal relationship between SAICA and its members through expanding their requirements on SAICA as related to members and those regulators/standard setters. We are also concerned that this is a global trend and expands beyond tax as is evident with the latest expanded anti-money laundering requirements.

This poses a unique challenge to Institutes like SAICA who have many local but also international accreditations and associations that enable its members to operate in a multitude of industries. The role of SAICA is to promote the interest of its members and it will subject its members to the common Professional Code of Conduct that members sign up to and that, as a collective, we have agreed to subject ourselves to. However, when a multitude of regulators and standard setters all seek to impose their own and often unique monitoring and enforcement requirements on SAICA's different members, this creates significant difficulties as to how it is all imposed across a heterogeneous membership and how it impacts SAICA's relationship with its members.

Similar to other countries, it also contributes to the concerning trend that young people are choosing careers outside of formal and regulated professions and that these professions will struggle to attract new entrants and grow sustainably, which is already happening in audit and starting to happen in tax. We have also raised concerns that some employers and businesses are starting to impose conditions of service that employees do not belong to voluntary bodies that impose rigid and expanded conditions that will impact how the employer does business. This all contributes to the sustainability of various regulated professions and the professional bodies that have over centuries supported the development of publicly acceptable and sustainable standards and norms. The initial reaction by regulators to this seems to be that regulation is expanded outside the traditional professions and to just include all services rendered that impact a regulated activity, irrespective of who actually does it. This complex matter has been identified by SAICA management for inclusion in the SAICA Strategy 2024.

7. How is the outcome of the new CPD policy measured? How are we measuring whether CAs(SA) are acting in a more ethical way, generally speaking?

SAICA requests members to submit annual declarations, confirming their compliance with the CPD policy, Code of Professional Conduct, and the SAICA By Laws. Members who are selected for monitoring are requested to provide their reflective plan as evidence, demonstrating adherence to the CPD policy. The reflective plan is reviewed to ensure its relevance in achieving the required professional competencies. Ethics is a compulsory core competency requirement that all members should demonstrate on a daily basis. Cases of non-compliance are referred to SAICA's Legal & Disciplinary division for further investigation.

SAICA continuously fosters the importance of ethical behaviour amongst members. Members are constantly made aware of their compliance and ethical obligations through presentations and training, webinars, SAICA newsletters, ASA magazine, the website, SAICA's social media platforms, and e-mail communication. We encourage members to engage with our Ethics content on our various platforms.

8. How do you see the old CA(SA) generation and the new and upcoming CAs(SA) staying relevant? Not just digitally, but in a world so overloaded with information that it is sometimes difficult to even comprehend how much there is to know.

SAICA has for some time considered the increasing volume of knowledge and information on hand for both prospective and existing members and associates. This was specifically addressed through the CA2025 project which will reach its conclusion as a project in 2025/2026. This project identified this specific challenge and as a result, we concluded that there is no way everyone can know everything. It is for that reason the CA2025 framework placed more emphasis on the following:

- a. Development of skills that can be applied within the technical knowledge context
- b. Skills include:
 - i. Adopting an attitude of ongoing and lifelong learning
 - ii. Decision-making skills
 - iii. Business acumen skills
 - iv. Digital acumen skills
 - v. Relational acumen skills

SAICA's CPD policy also emphasises the need for each member to take responsibility for their own learning and development and continue to develop their professional competence (knowledge, skills, attitudes, and values) in the context of their specific roles.

- 9. I'd like to know what SAICA's policy or thoughts are about those members who have subscribed to independent service providers' portals where we log our CPD (reflections, plan, assessment etc.) and how that can potentially integrate or link up with the SAICA Learning Management System (LMS). I certainly hope that we won't be forced to redo all we have done on the other site on the new SAICA LMS / CPD recording site. I am eager to hear about guidance for CAPtR.**

SAICA will be launching its learner management system "eVolve" in early May 2023.

Members who have subscribed to independent service providers' portals for their CPD may continue using these portals for their CPD needs and reporting. We would however encourage such members to visit our new eVolve platform as there will be several learning activities that may also suit your needs. In terms of annual reporting (when you are called upon to provide details of your learning reflection plan), the SAICA compliance team will accept reports from these service providers, provided they demonstrate the "Plan, Do, Review" and reflection process in addition to records maintained on the eVolve platform.

Further resources will be provided and webinars will be held to engage members on all the changes and happenings in the post-qualification learning and development space.

In this regard, SAICA has also launched a bi-monthly newsletter that specifically focuses on Learning and Development, in an effort to support members in the CPD process. We encourage members to read this newsletter.

RELEVANCE AND REPUTATION

- 10. Are we not crumbling the foundations of a great profession by not being more aggressive in sanctioning rogue CAs(SA)?**

SAICA's two independent disciplinary committees decide on the appropriate sanctions to be imposed on members who are found guilty of punishable conduct. In 2022, four members were excluded/cancelled as members of SAICA, and in the first quarter of 2023, one additional member was excluded from membership with significant fines also being imposed.

It should further be noted that SAICA's disciplinary committees follow a proper legal process, where evidence is gathered before decisions are made. These matters, as in all legal matters, take time. Given that SAICA does not have rights to search or subpoena, we rely heavily on our stakeholder relationships with prosecutorial authorities to ensure we have sufficient evidence before findings are made against so-called 'rogue' members.

11. Why is SAICA not advocating for the government to hire qualified accountants in CFO positions?

SAICA continuously engages with the government to promote the employment of qualified accountants in CFO positions through the promotion of the professionalisation of the public sector. This includes advocacy through media platforms.

SAICA has also improved its approach to promoting and supporting members in the public sector in an effort to encourage members to apply for CFO positions in the public sector. Some key projects include:

- Career Mobility: educating the public sector and private sector on the competence of CAs(SA) and promoting members for both the public and private sector.
- Ethics and Intimidation: supporting members by providing information and guidance on ethical dilemmas, advocating for an enabling environment for members who serve in the public sector, and identifying support for members on whistleblowing.

12. The AGSA's Accountability Culture 2030 refers. Please advise why no pressure is placed on National Treasury to implement GRAP Standards in the Provincial and National Departments. Modified Cash Standards presently applied in these departments lack the principle of accountability.

SAICA has a key initiative in its public sector projects referred to as "*Advocating for accrual accounting for National and Provincial Departments*". Through SAICA's submission to National Treasury on the 2022-23 Modified Cash Standards, SAICA advocated for the move to accrual accounting and the importance thereof. SAICA received acknowledgement of the letter, however, no input was received on the status or the plan for accrual accounting.

SAICA will continue advocating through consistent engagements with National Treasury and other stakeholders to promote accrual accounting for the national and provincial government.

13. Please give an update on the Professionalising of the Public Sector framework? Is this ever going to happen under the rule of the ANC or do we have to wait for a possible change in Government in 2024?

The government approved the *National Framework towards the Professionalisation of the Public Sector* in the last quarter of 2022 and is currently in the process of implementation.

SAICA is monitoring the implementation of the Framework and will continue to advocate to ensure the success of its implementation.

In addition, SAICA has engagements with various stakeholders within the government, including national, and provincial government, to promote the professionalisation of finance officials.

SAICA has also revisited its approach to promote the professionalisation of the public sector as follows:

- Accrediting public sector training officers



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- Academic programme updated to include public sector
- Advocating for professionalisation
- Public sector member profiling
- Public sector members as ambassadors

14. Why is SAICA not taking a stand publicly on the Phala Phala matter? Silence is often considered a lack of ethics.

SAICA is a membership body and a professional accountancy body. SAICA is not a political party and therefore does not take any political positions. Our mandate from members relates to areas that affect the profession directly. Through platforms such as *Courageous Conversations*, SAICA allows opportunities for various stakeholders to present a view on areas affecting the profession directly.

15. What are the continued efforts to protect and ignite the CA(SA) brand?

SAICA annually implements an ongoing integrated relevance and reputation communications strategy. Since 2018, SAICA's marketing and communications priority has focused on protecting the reputation of the profession by rebuilding trust in the profession (#trustleadership) considering the ongoing revelations of alleged CA(SA) malfeasance in several widely published cases and several members implicated in the findings of the Zondo Commission.

The strategy also aims to build the relevance of the profession by promoting it as a profession of national value (#aprofessionofnationalvalue).

The trust reconstruction strategy positions the profession's leaders as brand ambassadors using the Difference Makers organising concept that was launched in 2021 through thought leadership and member profile articles. The Difference Makers organising concept is a global promotional effort, run by Chartered Accountants Worldwide.

Regular updates on the outcome of SAICA's disciplinary processes are also critical in rebuilding trust in the reputation of the profession.

SAICA further builds and maintains relationships with the media, including regular meetings between prominent media editors and the SAICA CEO, to ensure balanced exposure in top-tier media such as print, broadcast (radio and television) and digital media. Further engagements include civil society organisations and communications include those with broader public interest, while retaining a member focus. Social media also remains a strong platform and SAICA is currently active on 15 social media channels with engagement levels well above published industry averages.

In terms of measurement of our efforts, SAICA monitors the market status of its designations through an annual independent brand survey conducted by Ask Afrika among business decision-makers across all sectors of the business market in South Africa. This provides insight into the impact of external market factors on the profession as well as the effectiveness of SAICA's reputation management as well as the reputation of the CA(SA) designation. Below is a results comparison of the last four years:



	Stakeholder	2022	2021	2020	2019
Brand strength of the CA(SA) designation					
• Spontaneous Awareness Index	Business decision makers	92%	94%	90%	87%
• Preference in Employees Index		75%	78%	74%	67%
• Net Promotor Score		34%	29%	37%	36%
• Trust Index		83%	83%	84%	80%
• Admiration Index		70%	73%	68%	68%

The important lead indicators of CA(SA) brand health have risen since 2019, despite ongoing historical and new negative publicity around the profession.

The Admiration Index, arguably the most important measure of the standing of the CA(SA) brand among business decision-makers, continues to be impacted by the ongoing negative publicity despite the positive trend in the other lead indicators and increased by 5% to 73% at the end of 2021.

The challenge SAICA had with the APC examination at the end of 2021 also contributed significantly to these scores. SAICA is currently implementing a Net Promoter Score (NPS) campaign, based on the value proposition of becoming a CA(SA), aimed at business decision-makers, parents and teachers, to promote chartered accountancy as a career, which will address the low numbers in the NPS index. This campaign should improve the NPS rating going forward.

While we believe our trust reconstruction promotion activities are effective in improving brand admiration over time, recovery is likely to continue to be affected by ongoing negative publicity implicating CAs(SA). Given the results from the survey mentioned above, the perception that the CA Profession in South Africa is slowly but surely losing its prestige as one of the best professions in the world, is not accurate. Yes, the profession has attracted negative exposure over the last few years, but our efforts to manage the brand's reputation are proving to be successful. The next Ask Afrika survey will be conducted at the end of 2023.

In addition, every two years SAICA takes part in the global brand trust survey with Chartered Accountants Worldwide (CAW), which is conducted independently by Edelman.

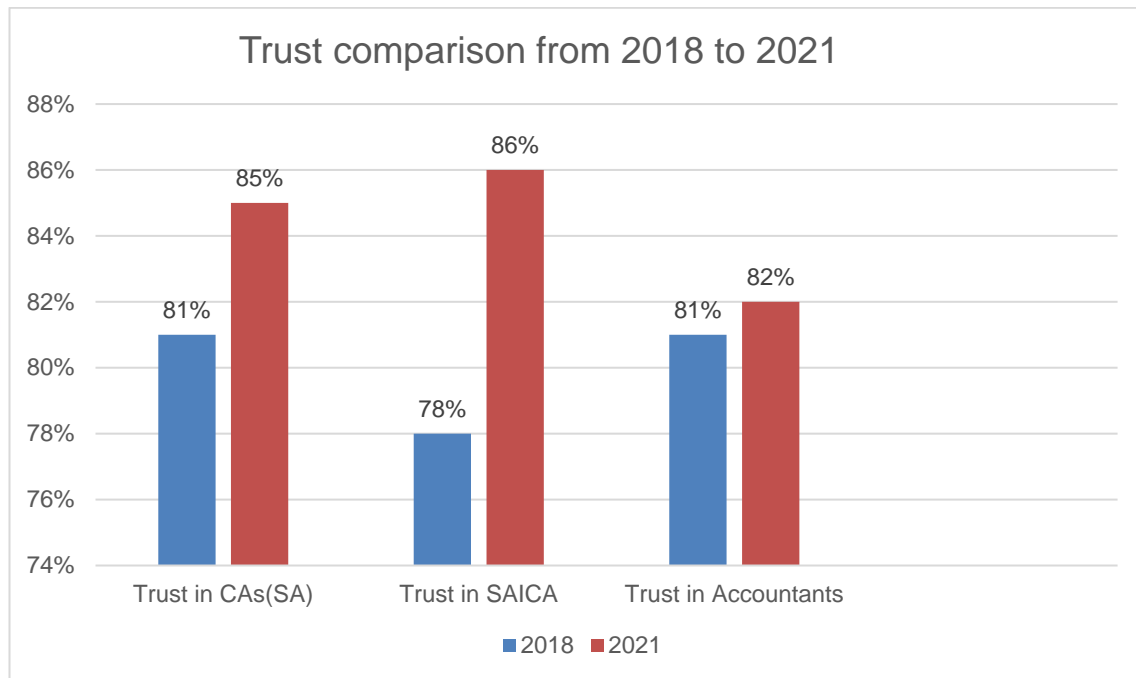
The most recent survey, conducted in 2021, showed the following:

Globally, South Africa was the strongest performing country compared to 14 other institutes who form part of CAW.

- **Trust in Chartered Accountants** proved more resilient than the profession more broadly, strengthening across most markets. The global average for trust in chartered accountants was 78%, while trust in South African CAs(SA) improved to 85% from 81% in 2018.



- **Trust in CA bodies** also remained high across markets, with a global average of 77% trust in CA bodies, with SAICA coming out on top with 86% (from 78% in 2018).



Note: SAICA did not take part in the 2019 survey and no survey was done in 2020.

The next Edelman survey will be conducted at the end of 2023.

Given the results from the surveys mentioned above, the perception that the CA Profession in South Africa is slowly but surely losing its prestige as one of the best professions in the world, is not accurate. Yes, the profession has attracted negative exposure over the last few years, but our efforts to manage the brand's reputation are proving to be successful. Trust reconstruction and reputation management, under the #difference-makers umbrella, will continue to be a core focus in the SAICA Strategy 2024-2026.

TRANSFORMATION AND GROWTH

16. Why is the post-accreditation visit so negative and focused on de-accrediting small black firms?

SAICA follows a rigorous and consistent process to accredit academic, professional and training providers. Our aim is to accredit all providers who meet the required standards as set out and assessed in the accreditation criteria. The purpose of a post-accreditation visit for a training office is to ascertain that the training office continues to meet the obligations it has committed to on paper when the office is accredited and to ensure that the office continues to provide the best support for the development of prospective CAs(SA).

17. The quality of articled clerks is very poor (certainly the crop I am dealing with over the past 10 years). What is SAICA doing to improve the traineeship program, going right back to the university level?



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SAICA would like to better understand this comment. What is meant by “poor quality”? The member is encouraged to reach out to Mandi Olivier (mandio@saica.co.za) so she can engage with the member on the matter and unpack this further. For example, what are the specific things trainees are or are not doing that lead the member to conclude that the quality is poor?

18. What is the view of the profession on SAICA exam standards? The SAICA training booking system remains a concern, what is the general view on the system? Is it subject to further improvement?

SAICA cannot comment on the profession’s view, however, SAICA’s view is that its professional examinations are of a high standard and internationally comparable. This was verified through the Independent Review done in 2021 and the 2022/2023 process of reviewing SAICA’s reciprocity agreements.

The concern regarding the booking system is discussed in the Organisational Sustainability section below.

19. How far is SAICA from meeting its transformation targets and how can this be used to deepen the dent in poverty?

SAICA believes that a great amount of work has been done to date and several achievements are worth mentioning in this regard:

- In 1980, there were only 8 African and coloured CAs(SA) in South Africa. Today, thanks in large part to Thuthuka, there are over 8 600 Africans and over 2 000 Coloured CAs(SA) registered with SAICA. Of these, 16 521 CAs(SA) are under the age of 35, with 4 393 being African and 1 013 being Coloured. This represents 33% of the total membership population under 35.
- Thuthuka is responsible for the creation of more than 3 000 African and coloured CAs(SA) with a further 2 000 or so aspiring CAs(SA) currently in the qualification pipeline.
- The Department of Higher Education is modelling its Ministerial Task Team’s Missing Middle Solution on Thuthuka’s highly effective bursary model. Today that project, the Ikusasa Student Financial Aid Programme (ISFAP), has given more than 1 800 students the chance to complete a tertiary degree in one of the 11 Occupations of High Demand, including chartered accountancy.
- With the help of Thuthuka, all six of South Africa’s Historically Disadvantaged Institutions (HDIs) have achieved SAICA accreditation for their undergraduate BCom CA-stream degrees. This means prospective CAs(SA) no longer have to move to other provinces to pursue a degree in chartered accountancy. Further efforts are in place to accredit the postgraduate degree of these HDIs through a combined accreditation project.
- SAICA also runs several initiatives aimed at the promotion of mathematics and assisting learners to improve their mathematics performance.

All these educational achievements contribute to the fight against unemployment. Yet, SAICA believes that more is still required in this regard. Representation is still not where it ought to be. The issue of mathematics in the country is a growing point of focus as mathematics is a gateway subject to several occupations in high demand.

Members can collaborate or participate in SAICA’s educational and transformation initiatives that contribute to improving the quality of education in the country and therefore contribute to the fight

against unemployment. Members can visit the Thuthuka page on the SAICA website for more information.

20. SAICA has been involved in community development and capacity-building projects such as the Schools Governing Bodies capacitation, matriculants' camps, maths and science interventions, etc. How does the organisation measure the impact of these initiatives? Is the ROI linked to a particular metric, for example, increased membership of SAICA designations or other professional bodies' qualifications/designations?

SAICA measures the impact of the school initiatives through surveys with first-year university accounting students. Students are asked how they came to know about the CA profession. This in turn contributes to the number of candidates writing the SAICA qualifying examinations, which in turn leads to potential members of SAICA.

It is important to also note that several of the mathematics promotion initiatives lead to learners choosing mathematics as a subject in high school and focus on initiatives that will help improve their performance in mathematics. This in turn leads to learners that can be accepted to a SAICA-accredited university programme.

It is also important to note that SAICA must contribute to the aspects considered to be national imperatives. This improves the reputation of the profession as the profession is seen to be contributing to the country and not just growing its own timber.

SAICA, in partnership with the provincial Departments of Education, also recognises top-performing students, and this results in learners being afforded the Thuthuka bursary. All these initiatives lead to growth in the CA pipeline.

ORGANISATIONAL SUSTAINABILITY

The response below is aimed at the following questions:

- 21. How can SAICA comment on the SARS webpage and eFile issues if SAICA has failed for +3 years to attend to their own disjointed webpage?**
- 22. Given that continued professional development and ongoing upskilling is such a pivotal cornerstone of being a successful Finance Business Partner, can SAICA ensure that the event booking site (and payment process) is more user-friendly? When members attempt to book SAICA-hosted events, it feels like the administration burden is more than it should be when hopping between emails, seminar events and finally booking / reserving a place? In today's age of technological advancement, members expect a smoother process for something as simple as reserving an interesting (and relevant) seminar / webinar / discussion.**
- 23. What progress has/is being made in sorting out the IT issues around the websites, which one is which and when this will be finalised?**



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24. The back-office administration requires major improvement. The event booking system is nonresponsive some of the time. Integritax quizzes should appear as soon as ASA is launched. I do feel that for the fees we pay we don't get value.

25. As a member of an institute that has global recognition, I am bitterly disappointed, and equally frustrated, by the lack of investment in technology. My specific issue relates to the SAICA events booking system. By comparison, every other webinar I register for with other service providers provide the ability to book your diary via the download of a calendar invite. This is a longstanding frustration. SAICA invested in a new website but unfortunately that did not include the booking system, which is a separate website.

SAICA has been on a journey to transform our digital ecosystem to make it fit-for-purpose, and better align it with fast-evolving market requirements (both internally and externally). Thus, enabling us to serve you, our members, better, and in turn drive organisational sustainability. This journey entails a rehaul of both our back-end technology as well as front-end user experience. In an ideal world, we would be able to execute both in parallel, however some of our current capabilities has dictated that these changes happen as a relay. We acknowledge that this has resulted in a lengthy process and continued member frustration.

This is how we've enhanced the experience to date:

- Ability to pay immediately with credit/debit card (This was previously not available)
- Automatic receipt of invoices.
- Ability to book for a full event series or a specific selection of events within the series (Members previously had to book one by one).
- Ability to add a guest for social events without having to load their full profile on the system (Previously, a full profile had to be created for guests for social events e.g., dinners, golf days etc. and it took a day or two for this profile to be approved, which caused a delay in booking).
- From a front-end user-experience perspective; we redesigned the content part of the website as well as optimised the search functionality. We asked some of our members to assist with the redesign process by testing it, and the response has been very positive. We are in the process of reviewing the rest of the front-end user interface and we will continue to optimise it to ensure that our members have an overall positive SAICA digital experience.

This is what you can expect in Quarter 2 of 2023:

- We are in the final stages of delivering an enhanced seminars and events experience on the website. This will eliminate the need to bounce between two websites as well as a more stable events booking system.

From an "Ushintsho" perspective; there has been great progress in our digital transformation journey, and we are on course to deliver the below Member Benefits in 2023:

- Easy access of billing and account information online.
- New accounts query management feature for members to track progress (i.e., refunds, penalties, etc.).
- Enhanced digitised user journey for member applications that includes practice registrations, tax practitioner registrations, etc.

- Experience a new mobile app to access functionality that is currently on the Member Portal (power apps).
- Exam candidates will be able to register for examinations, cancel registrations, request refunds, and obtain copies of admission letters online.
- Exam candidates will have access to a single system to apply for special concessions and receive feedback.

And these Internal Business Unit Benefits:

- Automated finance processes (Auto creation of invoices, auto allocation of payments, auto matching of receipts, etc.)
- New and enhanced reporting (Exams, Finance, Membership and Committees)
- Minimised contact centre queries thanks to the availability of self-service options on the Member Portal
- New digitised exams management process (marking, booking, and analytics)

We acknowledge that the process is lengthy and frustrating, however, we trust that this is an indication that we are committed and are on the right track. We appreciate our members' continued patience and support during this digital transformation.

26. I need to understand why it is taking so long to get responses when I submit queries on the Member Portal? I can't phone the SAICA call centre every time I want to know something - surely the online queries should have a specific turnaround time? I've been waiting for some responses for weeks already.

SAICA is aware that during specific deadlines (for example, member subscription payments or CPD declarations), the query volumes do increase, which then results in a slower-than-desired response time to queries. SAICA is actively managing the query resolution turnaround time by attempting to address the reasons for the increase in volumes, to ultimately reduce the number of queries. The reasons for the queries vary and as such there is not necessarily a single solution that can reduce all the queries.

Each phase of the digitisation process improvement project is aimed at increasing the level of "self-service" functionality available to members, thereby reducing the number of queries that members need to log. This will further assist SAICA in maintaining the optimal turnaround time for query resolution.

We are continuously implementing solutions to address the need for the queries to be logged. SAICA is currently in the process of deploying the finance services functionality on our digital platform and, going forward, all members will be able to access their invoices directly from the Member Portal without needing to log a call.

We appreciate members' patience while we are optimising our services and we apologise for any inconvenience caused.