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PERSONNEL ADMINISTRATIVE MEASURES (PAM)

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**CONSOLIDATION OF THE TERMS AND CONDITIONS OF EMPLOYMENT OF
EDUCATORS DETERMINED IN TERMS OF SECTION 4 OF THE EMPLOYMENT OF
EDUCATORS ACT, 1998**

I, Angelina Matsie Motshekga, Minister of Basic Education, have in terms of section 4 of the Employment of Educators Act, 1998 determined and consolidated the terms and conditions of employment of educators as set out in the schedule below.



**MRS AM MOTSHEKGA, MP
MINISTER OF BASIC EDUCATION**

DATE: 13/07/2022

PERSONNEL ADMINISTRATIVE MEASURES (PAM)

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ACRONYMS

ABC	Activity-based costing
COLTS	Culture of learning, teaching and services
DBE	Department of Basic Education
DG	Director-General
EEA	Employment of Educators Act, 1998
EISP	Employee initiated severance package
ELRC	Education Labour Relations Council
EMD	Education management development
GPS	Global positioning system
GS	General Secretary of the ELRC
HoD	Head of Department
HPCSA	Health Professions Council of South Africa
ICT	Information and communication technology
INSET	In-service education for teachers
LIFO	Last in, first out
LRA	Labour Relations Act, 1995
LSEN	Learners with special education needs
MASP	Mutually agreed to severance package
MEC	Member of the Executive Council
MTEF	Medium term expenditure framework
NEPA	National Education Policy Act, 1996
NQF	National Qualifications Framework
OSD	Occupation Specific Dispensation
PAIA	Promotion of Access to Information Act, 2000
PAM	Personnel Administrative Measures
REQV	Relative education qualification value
RSA	Republic of South Africa
SACE	South African Council for Educators
SASA	South African Schools Act, 1996
SGB	School governing body
SMT	School management team
SRC	Student Representative Council
SS	Shop steward

*PERSONNEL ADMINISTRATIVE MEASURES (PAM)***CHAPTER A: POST PROVISIONING AND GRADING NORMS, WORKLOAD AND JOB DESCRIPTIONS**

- A.1 SCOPE OF APPLICABILITY**
- A.2 NORMS/GUIDELINES FOR THE PURPOSES OF ESTABLISHMENT DETERMINATION**
- A.3 GRADING OF INSTITUTIONS**
- A.4 WORKLOAD OF SCHOOL-BASED EDUCATORS**
- A.5 DUTIES AND RESPONSIBILITIES OF EDUCATORS**

ANNEXURE

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- Annexure A.2 Core duties and responsibilities: Teacher
- Annexure A.3 Core duties and responsibilities: Senior Teacher
- Annexure A.4 Core duties and responsibilities: Master Teacher
- Annexure A.5 Core duties and responsibilities: Departmental Head
- Annexure A.6 Core duties and responsibilities: Deputy Principal
- Annexure A.7 Core duties and responsibilities: Principal
- Annexure A.8 Job descriptions for office based educators

A.1 SCOPE OF APPLICABILITY

- A.1.1 This PAM is applicable to all educators as defined in the EEA.
- A.1.2 There may, in respect of the matters regulated in this PAM, be no deviation from the prescribed measures: Provided that should there be cases not covered in the measures contained herein or should there be any doubt as to the application of the provisions in individual cases, or should there be cases that could justify a deviation from a measure, particulars thereof shall be submitted to the DBE, with a view to a decision regarding such application or possible deviation by the Minister of Basic Education with the concurrence of the Minister of Finance in the event of an amendment or supplementation having a financial implication, after negotiation and agreement in terms of the LRA.

A.2 NORMS/GUIDELINES FOR THE PURPOSES OF ESTABLISHMENT DETERMINATION**A.2.1 Educator Personnel**

- A.2.1.1 The educator post establishment of the DBE consists of the posts created by the Minister.
- A.2.1.2 The educator post establishment of a provincial department of education consists of the posts created by the MEC responsible for education in terms of the measures set out in paragraph A.2.2.
- A.2.1.3 The educator post establishment of an education institution or office consists of the posts allocated to such an institution or office from the educator establishment of the provincial department of education by the head of such a department. The allocation of educator posts to schools by a HoD of a provincial department of education must be done in terms of the measures set out in paragraph A.2.3.

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A.2.2 Creation of Educator posts by a MEC Responsible for Education in a Province
(Government Gazette No 19627, dated 18 December 1998, as amended by Government Gazette No 24077, dated 15 November 2002) (Regulations regarding the terms and conditions of employment of educators (Schedule))

A.2.2.1 The MEC responsible for education in a province must determine the educator post establishment of the provincial department of education in terms of section 5(1)(b) of the EEA, in accordance with any applicable policy made in terms of NEPA.

A.2.2.2 In determining the post establishment of a provincial department of education, the MEC must –

A.2.2.2.1 Consult with the trade unions in that province which are members of the ELRC and governing body organisations which are active in that province.

A.2.2.2.2 Take into account –

- (a) The budget of the provincial department of education.
- (b) The effect that the post establishment will have on the employment security of educators.
- (c) The need for redress in the implementation and promotion of curriculum policy in keeping with the basic values and principles set out in section 195 of the Constitution of the Republic of South Africa.
- (d) The fact that the division between expenditure on personnel and non-personnel costs in the budget should be educationally and financially justifiable and in accordance with national policy that may exist in this regard.
- (e) The fact that the division between expenditure on educator and non-educator personnel costs in the budget should be educationally, administratively and financially justifiable and in accordance with national policy that may exist in this regard.

A.2.2.3 In determining the educator post establishment of the provincial department of education, the MEC must take into account the terms and conditions of employment of educators that may be affected by the post establishment, including provisions for leave, substitution and remuneration-related issues and may not vary any of these terms and conditions of employment.

A.2.3 Distribution of Educator Posts to Schools by a Head of Department
(Regulations regarding the terms and conditions of employment of educators (Schedule))

A.2.3.1 The HoD of a provincial department of education must, in terms of section 5(2) of the EEA, determine the educator post establishment of each public school in the province in question –

A.2.3.1.1 By applying the post distribution model set out in Annexure A.1.

A.2.3.1.2 By taking into account:

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- (a) The post establishment of the provincial department of education as contemplated in paragraph A.2.2.
- (b) The need for redress in the implementation and promotion of curriculum policy. The HoD of a provincial department of education must determine an annual programme in this regard after consultation with trade union parties to the ELRC and the governing body organisations that are active in that province.

A.2.4 Post Level Ratio Norms

- A.2.4.1 The distribution of personnel, that is, the provision of "posts" on the fixed establishment over the various post levels according to the post level ratio norm, must be based on full-time incumbents.
- A.2.4.2 Educators employed on a proportional basis, as well as part-time units who are paid on a per hour basis must be converted to full-time incumbent units. (This does not include full-time units remunerated for additional work.)
- A.2.4.3 For the purposes of the determining of the number of "posts" on the fixed establishment, substitutes on post level 1 must not be taken into account.
- A.2.4.4 The distribution of educators over post levels, including proportional appointments, must be monitored by the relevant provincial department of education every term.
- A.2.4.5 The distribution of educators over the various post levels in a particular reporting year, (excluding substitutes on post level 1), must conform to the prescribed post level ratio norms.
- A.2.4.6 Educators who hold lower post level gradings, but who are utilised on higher post levels and are remunerated on the higher post level must, for the purposes of the application of the formula be deemed to occupy posts on a higher level.
- A.2.4.7 The post level ratio norm shown in paragraph A.2.4.8 below is the most favourable distribution of educators (incumbents/full-time equivalent units) over post levels that can be applied. This means that the provision (number of incumbents) applicable to higher post levels that are not utilised, may be used as incumbent numbers on lower post levels.

A.2.4.8

<i>Post level</i>	<i>Ratio per 1 000 educators</i>
1	697,20
2	182,20
3	84,50
4	34,20
5	,95
6	,95

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Note: In the calculation of the number of educators at every post level, fractions must be omitted, e.g. 91.7 = 91. The fractions that are omitted must be added to the calculated provision of educators at post level 1.

A.2.5 Provision of Posts of Education Therapist (ELRC Resolution No. 5 of 1997)

A.2.5.1 Post provisioning norms for special schools in respect of education therapists are additional to post provisioning in respect of other categories of educators, namely those with teaching or psychological responsibilities.

A.2.5.2 The following post provisioning norms apply in respect of education therapists:

Disability of learners	Number of posts per learner
Cerebral palsied	0,050
Physically disabled	0,040
Specifically learning disabled	0,033
Visually impaired	0,010
Hearing impaired	0,010
Epileptic	0,020
Autistic	0,033
Severely intellectually impaired	0,010

A.2.5.3 In order to determine the number of therapist posts to be provided to a school, the number of learners in each disability category is multiplied by the applicable norm in paragraph A.2.5.2. Fractions of posts, which may occur after the calculated values in respect of all the categories of disability have been added together, are ignored. However, with regard to the provision of the first and only post to a school, a fraction of 0,5 or more will be rounded to a full post, unless the department concerned is able to render the required service by means of centrally based therapists.

A.2.5.4 Each learner may only be counted once even though they may be multiple disabled. Learners who are multiple disabled are counted under the category of disability that is, for purposes of post provisioning, more favourable.

A.2.5.5 For every multiple of 5 therapist posts, one post will be a supervisory post provided that at least 3 posts should be allocated in respect of a specific discipline of therapy (speech, physio- or occupational) for the allocation of a Chief Education Therapist post in respect of such discipline. Allocation of disciplines of therapy should be done in accordance with the specific needs of the school.

A.3 GRADING OF INSTITUTIONS (ELRC Collective Agreements No. 3 of 2006 and No. 1 of 2008)

A.3.1 The salary level of a principal of a school is determined by the grading of the school, which is done in accordance with the number of educator posts allocated to a school in terms of national norms. In respect of special schools (LSEN schools) the number of educator posts allocated to a school for this purpose, includes all educator posts allocated in terms of national norms (educators and therapists).

A.3.2 The grading of a school determines the salary range of the principal as indicated in the second column of the table below, and applies to a fully qualified principal.

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Educator posts on the departmental establishment of the school	Applicable salary range	Grading	Minimum posts required for up-grading	Number of posts to which the establishment must drop before the institution will be down-graded
1	Minimum notch code: 56 Maximum notch code: 138	One person school	2	-
2 – 3	Minimum notch code: 108 Maximum notch code: 186	P1	4	1
4 – 12	Minimum notch code: 126 Maximum notch code: 201	P2	13	2
13 – 24	Minimum notch code: 144 Maximum notch code: 215	P3	26	10
25 – 45	Minimum notch code: 159 Maximum notch code: 218	P4	47	22
46 +	Minimum notch code: 180 Maximum notch code: 221	P5	-	43

- A.3.3 A school is up-graded to a higher grading level if, for two consecutive years, the educator post allocation to the school reaches or exceeds the number of posts required for the up-grading of the school as indicated in the table above.
- A.3.4 A school is down-graded to a lower grading level if, for two consecutive years, the educator post allocation to the school drops to or below the number of posts that will effect such down-grading as indicated in the table.
- A.3.5 Re-grading of schools should be done on an annual basis and should be effective from 1 January, based on the school's post establishments of the previous year and of the current year. The higher salary notch will apply from date of up-grading of the school.
- A.3.6 Where the enrolment of a school increases or decreases substantially, affecting the post allocation to the school substantially, and sufficient evidence exists that the new enrolment and accompanying post allocation will be maintained for a reasonable period, the HoD may immediately re-grade the school in accordance with the relevant post allocation.

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A.3.7 The HoD may grade a new school in accordance with the enrolment and accompanying post allocation that the school is expected to maintain for a reasonable period.

A.3.8 Measures Applicable at Implementation on 1 July 2005

A.3.8.1 These grading norms came into effect on 1 July 2005. All existing schools should have been graded with effect from 1 July 2005 in terms of these norms, based on the 2005 or 2006 post allocation to a school, whichever was more favourable.

A.3.8.2 Where the principal's salary was to be increased as a result of the implementation of the norms, it became effective on 1 July 2005 after implementation of the general salary adjustment and salary progression that might have taken place on the same date. An increase in a principal's salary as a result of the implementation of the new norms is not regarded as an upgrading of the post and would, therefore, not require any procedure that applies to filling of a new post or a waiting period, as is the case with the upgrading of schools.

A.3.9 Where the new norms had the effect that the salary applicable to the post was lower than the salary of the incumbent principal as on the day the agreement became effective, such a principal will retain his/her salary range for as long as the school maintains the 1 July 2005 grading. Such a principal will still be eligible for salary progression up to the maximum of his/her salary range. A subsequent grading of the school to below the level on which it was graded on 1 July 2005, will affect the principal's position in terms of the measures applicable to the re-grading of schools.

A.4 WORKLOAD OF SCHOOL-BASED EDUCATORS (*ELRC Resolution No. 7 of 1998*)

A.4.1 Introduction

A.4.1.1 These measures cover all full-time educators (including psychologists, therapists and counsellors) that are school based.

A.4.1.2 The work done by educators includes the following core duties covered during a *formal school day* (with or without contact with the learners) and outside the *formal school day*.

A.4.1.2.1 During the formal school day

- (a) Scheduled teaching time.
- (b) Relief teaching.
- (c) Extra and co-curricular duties.
- (d) Pastoral duties (ground, detention, scholar patrol, etc.).
- (e) Administration.
- (f) Supervisory and management functions.

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(g) Professional duties (meetings, workshops, seminars, conferences) etc.).

(h) Planning, preparation and evaluation.

A.4.1.2.2 Outside the formal school day

(a) Planning, preparation and evaluation.

(b) Extra and co-curricular duties.

(c) Professional duties (meetings, workshops, seminars, conferences).

(d) Professional development.

A.4.1.3 Each post level within a school has different duties and responsibilities, encompassing the core duties outlined in paragraph A.4.1.2 above, but to a varying degree.

A.4.1.4 There should be an equitable distribution of workload between the various post levels and within a post level to ensure that educators on a particular level or an individual educator is not overburdened.

A.4.1.5 The expectation is that every educator must be able to account for 1800 actual working hours per annum.

A.4.2. Workload Per Educator

A.4.2.1 All educators should be at school during the *formal school day*, which should not be less than 7 hours per day, except for special reasons and with the prior permission of the principal. The principal will exercise his/her discretion in this regard based on provincial policy.

A.4.2.2 The 7 hours per day includes the breaks and the period/s in which the learners are not at school.

A.4.2.3 *Scheduled teaching time* during the *formal school day* will be specified with time allocation per post level. The principal must determine the allocation of subjects, timetable and resultant scheduled teaching time after consultation with the educator staff.

A.4.2.4 All other duties are specified and allocated by the principal after consultation with the educator staff. Educators will be expected to perform the core duties, as outlined in paragraph A.5.2, both within and outside of the *formal school day*, and with the understanding that none of these may diminish the overall amount of *scheduled teaching time* or negatively impact upon the curriculum.

A.4.2.5 An educator shall, during his/her official duty, give his/her full attention to the duties entrusted to him/her and shall not without the consent of the head of the relevant institution or office be absent from his/her school or institution during his/her hours of official duty. (*Regulation 23, Regulations regarding the terms and conditions of employment in education*)

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A.4.2.6 All educators may be required by the employer to attend programmes for ongoing professional development, up to a maximum of 80 hours per annum. These programmes must be conducted outside the *formal school day* or during the vacations. The employer shall give at least one term notice of programmes to be conducted during the school vacations.

A.4.3 Scheduled Teaching Time per Post Level

A.4.3.1 The time allocated for teaching in respect of different post levels will differ according to the size of the school. In smaller schools, principals and their deputy principals are required to do more teaching than in large schools with bigger staff establishments. The actual hours must therefore be established in relation to the curriculum needs of the school, the timetable and staff establishment of the school. Scheduled teaching time is expressed as a percentage of the total time that learners in the particular grades are required to be taught.

A.4.3.2 The allocation of *scheduled teaching time* should be done in such a manner that it:
-

A.4.3.2.1 Maximises the individual abilities of all educators.

A.4.3.2.2 Optimises teaching and learning at the institutional level.

A.4.3.3 In general terms, the following may be considered as guidelines in determining the *scheduled teaching time*: -

Primary School	Ratio per 1 000 educators
Post level 1	Between 85% and 92%
Post level 2	Between 85% and 90%
Deputy Principal	60%
Principal	Between 10% and 92%, depending on his/her post level NB. Principals of one-person schools are expected to teach 100% of the scheduled teaching time.

Secondary School	Ratio per 1 000 educators
Post level 1	Between 85% and 90%
Post level 2	85%
Deputy Principal	60%
Principal	Between 5% and 60% depending on his/her post level

A.5 DUTIES AND RESPONSIBILITIES OF EDUCATORS (ELRC Resolution No. 8 of 1998)

A.5.1 Introduction

PERSONNEL ADMINISTRATIVE MEASURES (PAM)

- A.5.1.1 The ability of our education system to compete in an increasingly global economy depends on our ability to prepare both learners and educators for new or changing environments. This is in line with the mission in the corporate plan of the DBE to ensure that all South Africans receive flexible life-long learning and education and training of high quality.
- A.5.1.2 Management in education should be able to draw on the professional competencies of educators, build a sense of unity of purpose and reinforce their belief that they can make a difference. When and where appropriate, authorities need to allocate authority and responsibility that will ensure the building of human resource capacity.
- A.5.1.3 In addition to the core duties and responsibilities specified in this section, certain specialised duties and responsibilities may be allocated to staff in an equitable manner by the appropriate representative of the employer.

A.5.2 Core Duties and Job Descriptions

Refer to the following annexure:

- Annexure A.2: Core duties and responsibilities: Teacher
- Annexure A.3: Core duties and responsibilities: Senior Teacher
- Annexure A.4: Core duties and responsibilities: Master Teacher
- Annexure A.5: Core duties and responsibilities: Departmental Head
- Annexure A.6: Core duties and responsibilities: Deputy Principal
- Annexure A.7: Core duties and responsibilities: Principal
- Annexure A.8: Job descriptions for office based educators

Annexure A.1**POST DISTRIBUTION MODEL FOR THE ALLOCATION OF EDUCATOR POSTS TO SCHOOLS** (*Government Gazette No 19627, dated 18 December 1998, as amended by Government Gazette No 24077, dated 15 November 2002, as amended in 2008 per CEM decision (inclusion of new subjects)*)**PRINCIPLES ON WHICH THE MODEL IS BASED**

The model is based on the principle that available posts are distributed among schools, proportionally to their number of weighted learners.

The concept of “weighted learner”, instead of actual learner, is used to enable schools to compete on an equal footing for posts. As some learners and some learning areas require more favourable post allocations than others, each learner is given a certain weighting that reflects its relative need in respect of post provisioning. Other factors like the size of the school, the need to redistribute resources and the need to ensure equal access to the curriculum may require that additional weighted learners be allocated to some schools. A weighted learner enrolment for each school is determined, which, in relation to the total learner enrolment of the province, reflects its relative claim to the total pool of available posts in the province.

FACTORS THAT ARE BEING TAKEN INTO ACCOUNT IN DETERMINING THE POST PROVISIONING NEEDS OF SCHOOLS AND LEARNERS

Educational and administrative factors that impact differently on the post provisioning needs of learners and of schools for which specific provision is made in the model are the following:

- The maximum ideal class size applicable to a specific learning area or phase. This ideal maximum value also takes into account complicating factors that may apply, such as additional contact time required between educator and learner and the requirement to attend to learners in more than one place at the same time. Although the situation in South Africa is such that ideal maximum class sizes cannot be complied with, these ideal values form a basis of comparison between the requirements of all the learning areas and grades.
- Period load of educators. It is common practice that educators in the secondary school phases have a lower period load than educators in the primary school phases. This is mainly as a result of more complex time tables and subject combinations. A lower period load implies a more favourable overall learner-educator ratio. The norms used in this regard are based on average prevailing practices and do not represent workload policy.
- Need to promote a learning area. By providing a more favourable learner-educator ratio in respect of a learning area in grades 10 to 12, schools can be motivated to promote such a learning area. This may only be done in terms of national or provincial policy in this regard.
- The size of the school. The smaller a school, the more difficult it is to manage with a certain learner-educator ratio and the more favourable it should be. This matter is addressed by adding a certain constant number of weighted learners to each school. The constant additional number of weighted learners could be seen as providing for a school's principal post, or for part of it, independently from the number of learners. It could also be seen as providing for posts to deal with certain basic responsibilities that each school has, irrespective of its size.

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- The number of grades. Especially in respect of smaller schools, it is more complex to manage a school with a relatively large number of grades than a similar sized school with only a few grades. This matter is addressed by linking the additional number of weighted learners, referred to under the previous point, to the number of grades. A further increase in the number of weighted learners of a combined school is required to compensate for the management complexity of such a school.
- More than one language medium of instruction. In order to deal with this complicating factor, the number of weighted learners that is granted per grade in terms of the previous point, is increased if more than one language medium of instruction is used in the particular grade. A HoD may set a certain minimum number or percentage of the learners in a grade that must receive tuition in a second language before recognition is given in this way.
- Disabilities of learners. These learners require additional support from various categories of personnel. Norms with regard to the provisioning of educator posts, including teaching staff, therapists and psychologists still need to be determined. Until new norms have been determined, the norms for the allocation of educator (teaching staff) posts that applied in terms of the 1998 Post Provisioning Model, as published in Government Gazette No. 119627 on 18 December 1998, as well as the norms that applied in respect of therapist and psychologist posts, will continue to apply except in schools where the allocation is done in terms of a field testing of norms that are in the process of being developed. The weightings that apply to learners for purposes of allocating educator posts in terms of the Post Distribution Model are as follows:

Specifically Learning Disabled	3.0
Severely Intellectually Impaired	3.0
Epileptic	3.5
Cerebral Palsied	3.5
Physically Disabled	4.0
Severe Behaviour Problems	5.0
Hard of Hearing	5.0
Partially sighted	5.0
Blind	5.0
Deaf	5.0
Autistic	6.0

In accordance with specific circumstances in a department, each of the above weightings may be increased, after consultation with trade unions who are members of the ELRC, by between 0% and 20%. It is important to note that the weightings that apply to learners based on their curriculum, school phase, instruction media or the fact that both primary and senior secondary phases are provided for, do not apply to these learners.

Learners who are mildly to moderately learning disabled are weighted in terms of the curriculum they follow and not in terms of their disability. If they are accommodated in so-called special schools where they receive vocational training, they are counted as 2.5 weighted learners each.

- Access to the Curriculum. In order to ensure affordable and fair access of learners to the curriculum, the numbers of learners that are fully funded in respect of subjects that are more expensive to offer need to be regulated. (Certain subjects are more expensive than others because they require smaller classes and/or special equipment and facilities.) A HoD, therefore, may identify specific schools at which the offering of such subjects should take

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place as well as the maximum number of learners at such schools that should take the subjects concerned. This means that a maximum number (or percentage) of learners may be set in respect of a particular subject at a particular school. Should a school exceed such a limit, the excess learners will be funded in terms of the norms applicable to the least expensive subject. It is possible that the maximum number of learners that will be counted as taking a particular subject at a particular school may be specified as zero even though such a subject was considered for post provisioning purposes in the past. This would mean that all such learners taking such a subject would be counted as if they are taking the least expensive subject for purposes of post provisioning.

In order to assist a school to introduce such a subject, a certain minimum number of learners may be counted for post provisioning purposes during a phasing in period, even though the actual number of learners taking the subject is lower than this number. The implementation of these measures must be in accordance with a department's policy on redress in the implementation and promotion of the curriculum.

- Poverty. In order to compensate for the negative impact that poverty has on learning, the poverty grading of a school is also taken into account.
- Level of funding. Policy may require that different phases be funded at different levels. Currently, all grades are set at a 100% funding level while Grade R is set at a funding level of 0%. This is merely a tool that could be used if and when required.
- Ad Hoc factors. Certain factors that are not considered above, such as an unexpected growth in learner numbers, may exist at a particular school and may justify the allocation of additional posts to such a school. These posts must be allocated from an additional pool of posts that need to be created for this purpose.

WEIGHTING NORMS

The following norms and principles will apply in respect of all learners:

- (a) Grades 1 to 9:

Based on the principle that uniform curricula apply to learners in schools in all phases up to grade 9, the following formula is used to determine the weighting of a learner:

c divided by the ideal maximum class size, divided by the average prevailing period load, multiplied by the funding level.

$$(w = c/m/l \times f)$$

The value of c is set at 40 and refers to the highest ideal maximum class size in relation to which others are expressed.

Grade	Max Class size	Period load (%)	Funding level	Weight
	(m)	(l)	(f)	(w)
R	35	96	0	0
1 to 4	35	96	100	1,190
5 to 6	40	96	100	1,042
7	37	96	100	1,126

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Grade	Max Class size	Period load (%)	Funding level	Weight
8 to 9	37	87	100	1,2426

(b) Grades 10 to 12:

- In view of the variety of learning areas, each learner is weighted separately in terms of his or her curriculum.
- A total number of weighted learners (subject-learner weight or slw) is determined for the learners in a particular grade (10, 11 or 12) taking a particular subject by means of the following formula:

The number of learners taking the subject (l_s), multiplied by 40, divided by the ideal maximum class size, multiplied by the promotion factor (p), divided by the average period load (l), multiplied by the funding level (f), multiplied by the relevant weekly time allocation (t), divided by 27,5.

$$(slw = l_s \times 40/m \times p/l \times f \times t / 27,5)$$

In view of the fact that some subjects are compulsory for all learners and others may be limited in respect of the number of learners that will be recognized for post provisioning purposes, the following procedure needs to be followed:

- All learners are required to take 4 subjects from Group A as follows: 2 official languages, Mathematics or Mathematical Literacy and Life orientation. Therefore, the total weighting of all learners in a particular grade (l_g) in respect of the subjects in Group A is:

$$wl(A) = (2 \times (40/37 \times 1/0.84 \times 4.5/27.5) + (40/35 \times 1/0.84 \times 4.5/27.5) + (40/37 \times 1/0.84 \times 2/27.5)) \times l_g$$

$$= 0,7374 \times l_g$$

- In respect of Group B subjects, each learner may take any 3 subjects. Therefore, the maximum number of learner-subject combinations in respect of the various subjects in Group B (n_m), in respect of a particular grade in a school is 3 times the actual number of learners in that grade ($3 \times l_g$). The calculation of the total weighting of learners in a particular grade in respect of Group B subjects is done as follows:

In respect of each subject listed under Group B (excluding “all other Group B subjects”), calculate the weighted learners by means of the formula $slw = 40/m \times p/l \times f \times t/27,5 \times$ number of learners taking the subject. By adding the values of swl for all these subjects a value for $swl(1)$ is obtained.

If the total number of subject-learner combinations (n_t) used for the calculation in (a) is less than the maximum number of subject-learner combinations (n_m) that can apply, determine the value of $n_d = n_m - n_t$.

$$\text{Calculate } slw(2) = n_d \times 40/37 \times 1/0,84 \times 4/27,5 = n_d \times 0.1872.$$

The total number of weighted learners for the grade in respect of Group B subjects is $slw(B) = slw(1) + slw(2)$.

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If the total number of learner-subject combinations (n_t) used for the calculation in (a) is higher than the maximum number of learners (n_m) that can apply, adjust the value $swl(1)$ calculated in (a) above by multiplying it with n_d/n_m to obtain a value for $wl(B)$.

A total number of weighted learners for the particular grade is then determined as $wl(A) + wl(B)$.

The following norms apply:

Subject	Ideal (m)	Promot (p)	Period (l)	Time (t)	Funding (f)
Group A					
Official languages	37	1	84	4,5	100
Mathematics or Mathematical Literacy	35	1	84	4,5	100
Life Orientation	37	1	84	2,0	100
Group B					
Agricultural Management Practices	15	1	84	4	100
Agricultural Technology	15	1	84	4	100
Agricultural Science	37	1	84	4	100
Dance Studies	15	1	84	4	100
Design	12	1	84	4	100
Dramatic Arts	12	1	84	4	100
Music	6	1	84	4	100
Visual Arts	12	1	84	4	100
Civil Technology	15	1	84	4	100
Electrical Technology	20	1	84	4	100
Mechanical Technology	15	1	84	4	100
Engineering Graphics and Design	15	1	84	4	100
Computer Applications Technology	25	1	84	4	100
Information Technology	25	1	84	4	100
Life Sciences	32	1	84	4	100
Physical Sciences	30	1	84	4	100
Consumer Studies	25	1	84	4	100
Hospitality Studies	20	1	84	4	100
All other Group B subjects	37	1	84	4	100

Note: The values that appear in the table as promotion factors are all set as 1. This means that no provision is made in the table for the promotion of any of these subjects. Should provision be made in policy that a certain subject should be promoted by, say 7%, the value of "1" would become "1,07". The promotion factor per subject should be included in the provincial curriculum policy and would apply equally to all learners counted in the subject.

- (c) A further distinction between schools is made based on the size of the school, the number of grades and whether or not more than one language medium of instruction is used. Provision for this is made by adding a certain number of weighted learners to a school's weighted

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enrolment linked to each recognized language group (maximum of 2 language groups) and each grade provided for at the school. The following values apply:

A base number of weighted learners must be added to each school. Any value from 10 to 20, in accordance with a department's needs in this regard, will apply. A head of a provincial department must select a value that will ensure a proper balance in the allocation of posts to institutions of different sizes.

Additional weighted learners must be added in respect of each grade in which learners are enrolled. If learners in a particular grade are taught in more than one language medium, a further additional weighting will apply in respect of that grade. (A minimum number (or percentage) of learners in a particular grade receiving tuition in a second language may be specified before the additional provision applies. This additional weighting only applies once, irrespective of the number of additional languages that may apply):

Grades	1	2	3	4	5	6	7	8	9	10	11	12
Primary language group	2	2	2	2	2	2	2	3	3	3	3	3
Second language group	4	4	4	4	4	4	4	6	6	6	6	6

Any of the values in the table may be increased by a maximum of 2, provided that the head of a provincial department is satisfied that such an increase would lead to a more equitable allocation of posts.

In respect of a combined school, the base number of 10 to 20 weighted learners that is granted to a school in terms of paragraph (c), is granted in respect of both the primary school phase and the secondary school phase that the school has. For this purpose, the secondary school phase must include learners in any of grades 10 to 12.

(a) The total number of weighted learners in each school is then adjusted in terms of its poverty ranking.

The head of a provincial department must set aside a certain percentage of its available posts for poverty redress based on the department's relative level of internal inequality. The Minister may from time to time set the maximum percentage that provincial departments may use for this purpose. Until this limit is revised, it is set at 5%.

The redress posts are to be distributed to schools based on the relative poverty of the learners of a school, using an appropriate index within the framework of the indices utilized by the province in the National Norms and Standards for School Funding. The basis on which the redress posts are to be distributed among schools is as follows:

School quintiles	Allocation from redress pool or posts
Poorest 20%	30% of posts
Next 20%	27.5% of posts
Next 20%	22.5% of posts
Next 20%	15% of posts
Least poor 20%	5% of posts

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After the total number of weighted learners for each school has been determined, the number of posts to be allocated to a school is determined by means of the following formula:

Posts = Total number of posts available, multiplied by weighted learners of school,
divided by total weighted learners of all schools.

COMMUNICATION OF NEW POST ESTABLISHMENTS WITH SCHOOLS

Where a school's establishment is likely to change in any school year, the adjusted post establishment should, as far as possible, be communicated to the school on or before 30 September preceding the school year.

ROLE OF THE DBE

Provincial departments are required to adhere to the intent and spirit of these norms. Where a province deviates from any of these norms it needs to justify such deviation to the DBE. The DBE may require information from time to time from provinces in order to ensure that these norms are being implemented. Provinces are thus required to comply with these requests.

Annexure A.2**1. TEACHER**

JOB TITLE: Educator - public school

RANK: Teacher

POST LEVEL: 1

2. THE AIM OF THE JOB

To engage in class teaching, including the academic, administrative, educational and disciplinary aspects and to organise extra and co-curricular activities so as to ensure that the education of the learners is promoted in a proper manner.

3. CORE DUTIES AND RESPONSIBILITIES OF THE JOB

The duties and responsibilities of the job are individual and varied, depending on the approaches and needs of the particular school, and include, but are not limited to, the following:

3.1 Teaching

3.1.1 To engage in class teaching which will foster a purposeful progression in learning and which is consistent with the learning areas and programmes of subjects and grades as determined.

3.1.2 To be a class teacher.

3.1.3 To prepare lessons taking into account orientation, regional courses, new approaches, techniques, evaluation, aids, etc. in their field.

3.1.4 To take on a leadership role in respect of the subject, learning area or phase, if required.

3.1.5 To plan, co-ordinate, control, administer, evaluate and report on learners' academic progress.

3.1.6 To recognise that learning is an active process and be prepared to use a variety of strategies to meet the outcomes of the curriculum.

3.1.7 To establish a classroom environment which stimulates positive learning and actively engages learners in the learning process.

3.1.8 To consider and utilise the learners' own experiences as a fundamental and valuable resource.

3.2 Extra- & co-curricular

3.2.1 To assist the departmental head to identify aspects which require special attention and to assist in addressing them.

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- 3.2.2 To cater for the educational and general welfare of all learners in his/her care.
- 3.2.3 To assist the principal in overseeing learner counselling and guidance, careers, discipline and the general welfare of all learners.
- 3.3 Administrative**
- 3.3.1 To co-ordinate and control all the academic activities of each subject taught.
- 3.3.2 To control and co-ordinate stock and equipment which is used and required.
- 3.3.3 To perform or assist with one or more of other non-teaching administrative duties such as:
 - 3.3.3.1 Secretary to general staff meeting and/or others.
 - 3.3.3.2 Fire drill and first aid.
 - 3.3.3.3 Timetabling.
 - 3.3.3.4 Collection of fees and other monies.
 - 3.3.3.5 Staff welfare.
 - 3.3.3.6 Accidents.
- 3.4 Interaction with stakeholders**
- 3.4.1 To participate in agreed school/educator appraisal processes in order to regularly review their professional practice with the aim of improving teaching, learning and management.
- 3.4.2 To contribute to the professional development of colleagues by sharing knowledge, ideas and resources.
- 3.4.3 To remain informed of current developments in educational thinking and curriculum development.
- 3.4.4 To participate in the school's governing body if elected to do so.
- 3.5 Communication**
- 3.5.1 To co-operate with colleagues of all grades in order to maintain a good teaching standard and progress among learners and to foster administrative efficiency within the school.
- 3.5.2 To collaborate with educators of other schools in organising and conducting extra and co-curricular activities.
- 3.5.3 To meet parents and discuss with them the conduct and progress of their children.

PERSONNEL ADMINISTRATIVE MEASURES (PAM)

- 3.5.4 To participate in departmental committees, seminars and courses in order to contribute to and/or update one's professional views/standards.
- 3.5.5 To maintain contact with sporting, social, cultural and community organisations.
- 3.5.6 To have contacts with the public on behalf of the principal.

Annexure A.3

1. SENIOR TEACHER (*ELRC Collective Agreement No. 5 of 2006*)

JOB TITLE: Educator - public school

RANK: Senior Teacher

POST LEVEL: 1 (notch code 103)

2. THE AIM OF THE JOB

To engage in class teaching, including the academic, administrative, educational and disciplinary aspects and to organise extra and co-curricular activities so as to ensure that the education of the learners is promoted in a proper manner and act as mentor to less experienced teachers, students and intern (if and when applicable).

3. CORE DUTIES AND RESPONSIBILITIES OF THE JOB

The duties and responsibilities of the job are individual and varied, depending on the approaches and needs of the particular school, and include, but are not limited to, the following:

3.1 Teaching

- 3.1.1 To engage in class teaching which will foster a purposeful progression in learning and which is consistent with the learning areas and programmes of subjects and grades as determined.
- 3.1.2 To be a class teacher.
- 3.1.3 To prepare lessons taking into account orientation, regional courses, new approaches, techniques, evaluation, aids, etc. in their field.
- 3.1.4 To take on a leadership role in respect of the subject, learning area or phase, if required.
- 3.1.5 To plan, co-ordinate, control, administer, evaluate and report on learners' academic progress.
- 3.1.6 To recognise that learning is an active process and be prepared to use a variety of strategies to meet the outcomes of the curriculum.
- 3.1.7 To establish a classroom environment which stimulates positive learning and actively engages learners in the learning process.
- 3.1.8 To consider and utilise the learners' own experiences as a fundamental and valuable resource.

3.2 Extra & co-curricular

- 3.2.1 To assist the departmental head to identify aspects which require special attention and to assist in addressing them.
- 3.2.2 To cater for the educational and general welfare of all learners in his/her care.
- 3.2.3 To assist the principal in overseeing learner counselling and guidance, careers, discipline and the general welfare of all learners.
- 3.2.4 To share in the responsibilities of organising and conducting extra co-curricular activities.

3.3 Administrative

- 3.3.1 To co-ordinate and control all the academic activities of each subject taught.
- 3.3.2 To control and co-ordinate stock and equipment which is used and required.
- 3.3.3 To perform or assist with one or more of other non-teaching administrative duties such as:
 - 3.3.3.1 Secretary to general staff meeting and/or others.
 - 3.3.3.2 Fire drill and first aid.
 - 3.3.3.3 Timetabling.
 - 3.3.3.4 Collection of fees and other monies.
 - 3.3.3.5 Staff welfare.
 - 3.3.3.6 Accidents.

3.4 Interaction with stakeholders

- 3.4.1 To participate in agreed school/educator appraisal processes in order to regularly review their professional practice with the aim of improving teaching, learning and management.
- 3.4.2 To contribute to the professional development of colleagues by sharing knowledge, ideas and resources.
- 3.4.3 To remain informed of current developments in educational thinking and curriculum development.
- 3.4.4 To participate in the school's governing body if elected to do so.

3.5 Communication

- 3.5.1 To co-operate with colleagues of all grades in order to maintain a good teaching standard and progress among learners and to foster administrative efficiency within the school.
- 3.5.2 To collaborate with educators of other schools in organising and conducting extra and co-curricular activities.
- 3.5.3 To meet parents and discuss with them the conduct and progress of their children.
- 3.5.4 To participate in departmental committees, seminars and courses in order to contribute to and/or update one's professional views/standards.
- 3.5.5 To maintain contact with sporting, social, cultural and community organisations.
- 3.5.6 To have contacts with the public on behalf of the principal.

3.6 Mentoring

- 3.6.1 To act as mentor and coach for less experienced teachers.
- 3.6.2 When, and if required, to act a head of a subject, phase or grade as support to the relevant departmental head.

Annexure A.4

1. MASTER TEACHER (ELRC Collective Agreement No. 5 of 2006)

JOB TITLE: Educator - public school

RANK: Master Teacher

POST LEVEL: 1 (notch code 120)

2. THE AIM OF THE JOB

To engage in class teaching, including the academic, administrative, educational and disciplinary aspects and to organise extra and co-curricular activities so as to ensure that the education of the learners is promoted in a proper manner and act as mentor to less experienced teachers, students and intern (if and when applicable), to participate in and facilitate professional development activities and to provide management support to the management team of the school when and if required.

3. CORE DUTIES AND RESPONSIBILITIES OF THE JOB

The duties and responsibilities of the job are individual and varied, depending on the approaches and needs of the particular school, and include, but are not limited to, the following:

3.1 Teaching

3.1.1 To engage in class teaching which will foster a purposeful progression in learning and which is consistent with the learning areas and programmes of subjects and grades as determined.

3.1.2 To be a class teacher.

3.1.3 To prepare lessons taking into account orientation, regional courses, new approaches, techniques, evaluation, aids, etc. in their field.

3.1.4 To take on a leadership role in respect of the subject, learning area or phase, if required.

3.1.5 To plan, co-ordinate, control, administer, evaluate and report on learners' academic progress.

3.1.6 To recognise that learning is an active process and be prepared to use a variety of strategies to meet the outcomes of the curriculum.

3.1.7 To establish a classroom environment which stimulates positive learning and actively engages learners in the learning process.

3.1.8 To consider and utilise the learners' own experiences as a fundamental and valuable resource.

3.2 Extra- & co-curricular

- 3.2.1 To assist the departmental head to identify aspects which require special attention and to assist in addressing them.
- 3.2.2 To cater for the educational and general welfare of all learners in his/her care.
- 3.2.3 To assist the principal in overseeing learner counselling and guidance, careers, discipline and the general welfare of all learners.
- 3.2.4 To share in the responsibilities of organising and conducting extra co-curricular activities.

3.3 Administrative

- 3.3.1 To co-ordinate and control all the academic activities of each subject taught.
- 3.3.2 To control and co-ordinate stock and equipment which is used and required.
- 3.3.3 To perform or assist with one or more of other non-teaching administrative duties such as:
 - 3.3.3.1 Secretary to general staff meeting and/or others.
 - 3.3.3.2 Fire drill and first aid.
 - 3.3.3.3 Timetabling.
 - 3.3.3.4 Collection of fees and other monies.
 - 3.3.3.5 Staff welfare.
 - 3.3.3.6 Accidents.
- 3.3.4 To engage in management tasks in support of the school management team.

3.4 Interaction with stakeholders

- 3.4.1 To participate in agreed school/educator appraisal processes in order to regularly review their professional practice with the aim of improving teaching, learning and management.
- 3.4.2 To contribute to the professional development of colleagues by sharing knowledge, ideas and resources.
- 3.4.3 To remain informed of current developments in educational thinking and curriculum development.
- 3.4.4 To participate in the school's governing body if elected to do so.

3.5 Communication

- 3.5.1 To co-operate with colleagues of all grades in order to maintain a good teaching standard and progress among learners and to foster administrative efficiency within the school.
- 3.5.2 To collaborate with educators of other schools in organising and conducting extra and co-curricular activities.
- 3.5.3 To meet parents and discuss with them the conduct and progress of their children.
- 3.5.4 To participate in departmental committees, seminars and courses in order to contribute to and/or update one's professional views/standards.
- 3.5.5 To maintain contact with sporting, social, cultural and community organisations.
- 3.5.6 To have contacts with the public on behalf of the principal.

3.6 Mentoring

- 3.6.1 To act as mentor and coach for less experienced teachers.
- 3.6.2 When, and if required, to act a head of a subject, phase or grade as support to the relevant departmental head.
- 3.6.3 To collaborate with and support teachers regarding instructional procedures and personal growth.

Annexure A.5

1. DEPARTMENTAL HEAD

JOB TITLE: Educator - public school

RANK: Departmental Head

POST LEVEL: 2

2. THE AIM OF THE JOB

To engage in class teaching, be responsible for the effective functioning of the department and to organise relevant/related extra-curricular activities so as to ensure that the subject, learning area or phase and the education of the learners is promoted in a proper manner.

3. CORE DUTIES AND RESPONSIBILITIES OF THE JOB

The duties and responsibilities of the job are individual and varied, depending on the approaches and needs of the particular school, and include, but are not limited to, the following:

3.1 Teaching

3.1.1 To engage in class teaching as per workload of the relevant post level and the needs of the school.

3.1.2 To be a class teacher if required.

3.1.3 To assess and to record the attainment of learners taught.

3.2 Extra- & co-curricular

3.2.1 To be in charge of a subject, learning area or phase.

3.2.2 To jointly develop the policy for that department.

3.2.3 To co-ordinate evaluation/assessment, homework, written assignments, etc. of all the subjects in that department.

3.2.4 To provide and co-ordinate guidance:

3.2.4.1 On the latest ideas on approaches to the subject, method, techniques, evaluation, aids, etc. in their field, and effectively conveying these to the staff members concerned.

3.2.4.2 On syllabi, schemes of work, homework, practical work, remedial work, etc.

3.2.4.3 To inexperienced staff members.

3.2.4.4 On the educational welfare of learners in the department.

- 3.2.5 To control:
 - 3.2.5.1 The work of educators and learners in the department.
 - 3.2.5.2 Reports submitted to the principal as require.
 - 3.2.5.3 Mark sheet.
 - 3.2.5.4 Test and examination papers as well as memoranda.
 - 3.2.5.5 The administrative responsibilities of staff members.
 - 3.2.5.6 To share in the responsibilities of organising and conducting extra and co-curricular activities.

3.3 Personnel

- 3.3.1 To advise the principal regarding the division of work among the staff in that department.
- 3.3.2 To participate in agreed school/educator appraisal processes in order to regularly review their professional practice with the aim of improving teaching, learning and management.

3.4 General/administrative

- 3.4.1 To assist with the planning and management of:
 - 3.4.1.1 School stock, text books and equipment for the department.
 - 3.4.1.2 The budget for the department.
 - 3.4.1.3 Subject work schemes.
- 3.4.2 To perform or assist with one or more non-teaching administrative duties, such as:
 - 3.4.2.1 Secretary to general staff meeting and/or others.
 - 3.4.3.2 Fire drill and first aid.
 - 3.4.2.3 Timetabling.
 - 3.4.2.4 Collection of fees and other monies.
 - 3.4.3.5 Staff welfare.
 - 3.4.2.6 Accidents.
- 3.4.3 To act on behalf of the principal during her/his absence from school if the school does not qualify for a deputy principal or in the event both of them are absent.

3.5 Communication

- 3.5.1 To co-operate with colleagues in order to maintain a good teaching standard and progress among the learners and to foster administrative efficiency within the department and the school.
- 3.5.2 To collaborate with educators of other schools in developing the department and conducting extra-curricular activities.
- 3.5.3 To meet parents and discuss with them the progress and conduct of their children.
- 3.5.4 To participate in departmental and professional committees, seminars and courses in order to contribute to and/or update one's professional views/standards.
- 3.5.5 To co-operate with further and higher education institutions in relation to learners' records and performance and career opportunities.
- 3.5.6 To maintain contact with sporting, social, cultural and community organisations.
- 3.5.7 To have contacts with the public on behalf of the principal.

Annexure A.6

1. DEPUTY PRINCIPAL

JOB TITLE: Educator - public school

RANK: Deputy Principal

POST LEVEL: 3

2. THE AIM OF THE JOB

2.1 To assist the principal in managing the school and promoting the education of learners in a proper manner.

2.2 To maintain a total awareness of the administrative procedures across the total range of school activities and functions.

3. CORE DUTIES AND RESPONSIBILITIES OF THE JOB

The duties and responsibilities of the job are individual and varied, depending on the approaches and needs of the particular school, and include, but are not limited to, the following:

3.1 General/administrative

3.1.1 To assist the principal in his/her duties and to deputise for the principal during his/her absence from school.

3.1.2 To assist the principal, or, if instructed to be responsible for:

3.1.2.1 School administration e.g. duty roster, arrangements to cover absent staff, internal and external evaluation and assessment, school calendar, admission of new learners, class streaming, school functions; and/or

3.1.2.2 School finance and maintenance of services and buildings e.g. planning and control of expenditure, allocation of funds/resources, the general cleanliness and state of repairs of the school and its furniture and equipment, supervising annual stock-taking exercises.

3.2 Teaching

3.2.1 To engage in class teaching as per workload of the relevant post level and needs of the school.

3.2.2 To assess and to record the attainment of learners taught.

3.3 Extra- & co-curricular

3.3.1 To be responsible for school curriculum and pedagogy e.g. choice of textbooks, coordinating the work of subject committees and groups, timetabling, "INSET" and developmental programmes, and arranging teaching practice.

- 3.3.2 To assist the principal in overseeing learner counselling and guidance, careers, discipline, compulsory attendance and the general welfare of all learners.
- 3.3.3 To assist the principal to play an active role in promoting extra and co-curricular activities in school and in the participation in sports and cultural activities organised by community bodies.
- 3.3.4 To participate in departmental and professional committees, seminars and courses in order to contribute to and/or update one's professional views/standards.

3.4 Personnel

- 3.4.1 To guide and supervise the work and performance of staff and, where necessary, discuss and write or countersign reports.
- 3.4.2 To participate in agreed school/educator appraisal processes in order to regularly review their professional practice with the aim of improving teaching, learning and management.

3.5 Interaction with stake-holders

- 3.5.1 To supervise/advise the Representative Council of Learners.

3.6 Communication

- 3.6.1 To meet with parents concerning learners' progress and conduct.
- 3.6.2 To liaise on behalf of the principal with relevant government departments.
- 3.6.3 To maintain contact with sporting, social, cultural and community organisations.
- 3.6.4 To assist the principal in liaison work with all organisations, structures, committees, groups, etc. crucial to the school.

Annexure A.7**1. PRINCIPAL**

JOB TITLE: Educator - public school

RANK: Principal

POST LEVEL: 4

2. THE AIM OF THE JOB

2.1 To ensure that the school is managed satisfactorily and in compliance with applicable legislation, regulations and personnel administration measures as prescribed.

2.2 To ensure that the education of the learners is promoted in a proper manner and in accordance with approved policies.

3. CORE DUTIES AND RESPONSIBILITIES OF THE JOB

The duties and responsibilities of the job are individual and varied, depending on the approaches and needs of the particular school, and include, but are not limited to, the following:

3.1 General/administrative

3.1.1 To be responsible for the professional management of a public school as contemplated in section 16A(3) of SASA, and to carry out duties which include, but are not limited to –

3.1.1.1 The implementation of all the educational programmes and curriculum activities;

3.1.1.2 The management of all educators and support staff;

3.1.1.3 The management of the use of learning support material and other equipment;

3.1.1.4 The performance of functions delegated to him or her by the HoD in terms of SASA;

3.1.1.5 The safekeeping of all school records; and

3.1.1.6 The implementation of policy and legislation. (*SASA, section 16A(2)(a)(i) – (vi)*)

3.1.2 To give proper instructions and guidelines for timetabling, admission and placement of learners.

3.1.3 To have various kinds of school accounts and records properly kept and to make the best use of funds for the benefit of the learners in consultation with the appropriate structures.

3.1.4 To ensure a school journal containing a record of all-important events connected with the school is kept.

- 3.1.5 To make regular inspections of the school to ensure that the school premises and equipment are being used properly and that good discipline is being maintained.
- 3.1.6 To be responsible for the hostel and all related activities including the staff and learners, if one is attached to the school.
- 3.1.7 To ensure that departmental circulars and other information received which affect members of the staff are brought to their attention as soon as possible and are stored in an accessible manner.
- 3.1.8 To handle all correspondence received at the school.

3.2 Personnel

- 3.2.1 To provide professional leadership within the school.
- 3.2.2 To guide, supervise and offer professional advice on the work and performance of all staff in the school and, where necessary, to discuss and write or countersign reports on teaching, support, non-teaching and other staff.
- 3.2.3 To ensure that workloads are equitably distributed among the staff.
- 3.2.4 To be responsible for the development of staff training programmes, both school-based, school-focused and externally directed, and to assist educators, particularly new and inexperienced educators, in developing and achieving educational objectives in accordance with the needs of the school.
- 3.2.5 To participate in agreed school/educator appraisal processes in order to regularly review their professional practice with the aim of improving teaching, learning and management.
- 3.2.6 To ensure that all evaluation/forms of assessment conducted in the school are properly and efficiently organised.
- 3.2.7 To assist the HoD in handling disciplinary matters pertaining to educators and support staff employed by the HoD. (*SASA, section 16A(2)(e)*).

3.3 Academic performance of the school (*SASA, section 16A(1) (b)(i) – (iv)*)

- 3.3.1 To prepare and submit to the HoD an annual report in respect of –
 - 3.3.1.1 The academic performance of that school in relation to minimum outcomes and standards and procedures for assessment determined by the Minister in terms of section 6A of SASA; and.
 - 3.3.1.2 The effective use of available resources.
- 3.3.2 The principal of a public school identified by the HoD in terms of section 58B of SASA must annually, at the beginning of the year, prepare a plan setting out how academic performance at the school will be improved. The academic performance improvement plan must be –

- 3.3.2.1 Presented to the HoD on a date determined by him/her; and
- 3.3.2.2 Tabled at an SGB meeting.
- 3.3.3 The HoD may approve the academic performance improvement plan or return it to the principal with such recommendations as may be necessary in the circumstances.
- 3.3.4 If the HoD approves the academic performance improvement plan the principal must, by 30 June, report to the HoD and the governing body on progress made in implementing the plan. The HoD may extend the date on good cause shown.

3.4 Teaching

- 3.4.1 To engage in class teaching as per the workload of the relevant post level and the needs of the school.
- 3.4.2 To be a class teacher if required.
- 3.4.3 To assess and to record the attainment of learners taught.

3.5 Extra- & co-curricular

- 3.5.1 To serve on recruitment, promotion, advisory and other committees as required.
- 3.5.2 To play an active role in promoting extra and co-curricular activities in the school and to plan major school functions and to encourage learners' voluntary participation in sports, educational and cultural activities organised by community bodies.

3.6 Interaction with stakeholders

- 3.6.1 School governing body
 - 3.6.1.1 To serve on the governing body of the school and render all necessary assistance to the SGB in the performance of their functions in terms of SASA.
 - 3.6.1.2 To represent the HoD in the governing body when acting in an official capacity. (SASA, section 16A(1)(a)).
 - 3.6.1.3 The principal must – (SASA, section 16A(2)(b, c, d, f and (3))
 - (a) Attend and participate in all meetings of the governing body.
 - (b) Provide the governing body with a report about the professional management relating to the public school;
 - (c) Assist the governing body in handling disciplinary matters pertaining to learners; and
 - (d) Inform the governing body about policy and legislation.

- (e) Assist the governing body in the performance of its functions and responsibilities, but such assistance or participation may not be in conflict with –
 - (i) Instructions of the HoD;
 - (ii) Legislation or policy;
 - (iii) An obligation that he/she has towards the HoD, the MEC or the Minister; and
 - (iv) Provisions of the EEA and the PAM, determined in terms of the EEA.

3.6.2 To participate in community activities in connection with educational matters and community building.

3.7 Communication

3.7.1 To co-operate with members of the school staff and the school governing body in maintaining an efficient and smooth running school.

3.7.2 To liaise with the circuit/regional office, supplies section, personnel section, finance section, etc. concerning administration, staffing, accounting, purchase of equipment, research and updating of statistics in respect of educators and learners.

3.7.3 To liaise with relevant structures regarding school curricula and curriculum development.

3.7.4 To meet parents concerning learners' progress and conduct.

3.7.5 To co-operate with the school governing body with regard to all aspects as specified in SASA.

3.7.6 To liaise with other relevant government departments, e.g. Department of Health, Public Works, etc., as required.

3.7.7 To co-operate with universities, colleges and other agencies in relation to learners' records and performance as well as INSET and management development programmes.

3.7.8 To participate in departmental and professional committees, seminars and courses in order to contribute to and/or update professional views/standards.

3.7.9 To maintain contacts with sports, social, cultural and community organisations.

Annexure A.8**JOB DESCRIPTIONS FOR OFFICE BASED EDUCATORS****1. CHIEF EDUCATION SPECIALIST (CES)****A. JOB PURPOSE**

To provide strategic and managerial leadership as well as coordinate the implementation of programmes within the area of responsibility. This includes managing the DCEs and SESs.

B. KEY PERFORMANCE AREAS (KPA's)

- a) Provide professional leadership through the establishment and implementation of systems and structures that allow for effective management. These will include the following:
 - Mechanisms for quality assurance;
 - Effective utilisation of human resources; and
 - Monitoring and oversight.
- b) Establish clear channels of communication with relevant stakeholders;
- c) Manage information by collecting, analysing and translating data into knowledge for planning, decision making and reporting;
- d) Provide management and support in line with approved Strategic and Annual Performance Plans;
- e) Facilitate policy formulation, analysis and implementation;
- f) Undertake research and development with a view to improve service delivery;
- g) Manage the effective utilisation of finances and other resources;
- h) Ensure proper record keeping, control and reporting; and
- i) Any other reasonable function assigned by the employer within the job function.

C. COMPETENCIES:

- a) Monitoring and evaluation
- b) Performance Management
- c) Decision making and initiating action

- d) Adhering to principles and values
- e) Analysis and interpreting
- f) Writing and reporting
- g) Creating, conceptualising and innovating
- h) Organising and executing
- i) Coping with pressures and setbacks
- j) Time management

D. KNOWLEDGE AND SKILLS

- a) Knowledge of the Constitution as well as other relevant Acts and Policies.
- b) Experience in research on the latest developments related to curriculum transformation.
- a) A good understanding of Matrix management.
- c) Knowledge and understanding of ICT in Education, as it relates to teaching and learning in the classroom.
- b) A sound understanding of curriculum transformation issues and capacity building processes in education.
- d) Interpret, analyse and apply current legislation and departmental policies
- e) Supervisory, organizational and interpersonal skills.
- f) Proven written and verbal skills.
- g) Attention to details and a high level of accuracy, effective public relations and public speaking skills.
- h) Computer Literacy - MS Word, Ms Excel, MS Power Point and MS Outlook.

Additional KPAs:

1.1 CES: Curriculum Support and Delivery

- a) Manage the development and support of Subject Advisors at the Education District.
- b) Facilitate the multi-disciplinary team approach within the Curriculum component.
- c) Ensure efficient and effective provisioning of LTSM for all institutions.

1.2 CES: Institutional Management Governance and Support

- a) Provide support to circuit managers as well as education management and governance development (EMGD) teams. Ensure the implementation of school safety measures at institutions.
- b) Support, Supervise, monitor and guide the effective and efficient implementation of Performance Management Systems (e.g. IQMS and PMDS).
- c) Support the undertaking of School Self Evaluation (SSE) processes and subsequent development and implementation of School Improvement Plans (SIPs).
- d) Support the use of Information and Communications Technology (ICT) where necessary.

1.3 CES: District Learner Support / Inclusive Education Services

Manage the implementation of the following support programmes in the district:

- a) Inclusive education;
- b) Therapeutic services;
- c) Psychological services;
- d) Co- curricular services (Sports, Music, Values in Education and HIV AIDS); and
- e) Library services.

1.4 CES: Whole School Evaluation (WSE)

To coordinate Whole School Evaluation (WSE) processes that includes the following:

- a) Manage the day-to-day operations of the WSE programme in the province;
- b) Manage and support the WSE team in the execution of its functions;
- c) To quality assure reports that go to schools and collate these to compile provincial reports to the HoD; and
- d) To communicate gaps identified in evaluated schools to the relevant specialists for support services.

2. CIRCUIT MANAGER

A. JOB PURPOSE

To ensure the effective supervision, management functionality and performance of schools, in relation to administration, governance and curriculum delivery through professional and educational leadership, guidance and development.

B. KEY PERFORMANCE AREAS (KPA's)

- a) Supervision and management of school principals in curriculum delivery and administration of schools;
- b) Support school principals, school management teams and school governing bodies in the management and governance of schools;
- c) Conduct performance reviews and appraisals of principals;
- d) Monitor and support the implementation of performance management systems in schools;
- e) Provide support for professional growth of educators in line with the Circuit Improvement Plan (CIP);
- f) Evaluate the physical infrastructure of schools and communicate to the relevant section of the Department in terms of the needs of schools;
- g) Assist the circuit and the district in ensuring that examinations and assessments are implemented according to plan;
- h) Assist schools in maintaining a fair labour environment;
- i) Manage selection processes especially the appointment of principals in schools;
- j) Guide the process of school establishment, rationalisation and extension of curriculum in the circuit;
- k) Develop a profile of all schools allocated to him/her as per the required format;
- l) Moderate examination schedules;
- m) Facilitate and coordinate the effective running of examinations;
- n) Drive the implementation of relevant teaching and learning initiatives in the districts in line with departmental objectives;
- o) Advise Principals and school management teams on the Departments strategic plans so as to assist them with the development of school improvement plans in order to achieve the desired objectives;

- p) Analyse and identify professional, education and resource needs of districts (including physical, human and financial resources); and
- q) Ensure that Principals manage their budgets in line with the South African Schools Act and maintain financial records for audit purposes

C. COMPETENCIES:

- a) Monitoring and evaluation
- b) Performance Management
- c) Decision making and initiating action
- d) Adhering to principles and values
- e) Analysis and interpreting
- f) Writing and reporting
- g) Creating, conceptualising and innovating
- h) Organising and executing
- i) Coping with pressures and setbacks
- j) Time management

D. KNOWLEDGE AND SKILLS

- a) Knowledge of the constitution as well as other relevant Acts and Policies.
- b) Experience in research on the latest developments related to curriculum transformation.
- c) Knowledge and understanding of ICT in Education, as it relates to teaching and learning in the classroom.
- d) A sound understanding of curriculum transformation issues and capacity building processes in education.
- e) Interpret, analyse and apply current legislation and departmental policies
- f) Supervisory, organizational and interpersonal skills.
- g) Proven written and verbal skills.
- h) Attention to details and a high level of accuracy, effective public relations and public speaking skills.
- i) Computer Literacy - MS Word, Ms Excel, MS Power Point and MS Outlook.

3. DEPUTY CHIEF EDUCATION SPECIALIST (DCES)

A. JOB PURPOSE

To monitor, facilitate and support teachers on the implementation of programmes in their area of responsibility.

(**NB:** DCESs are field workers and are also managers accountable to the CES for their operations).

B. KEY PERFORMANCE AREAS (KPAs)

- a) Provide professional leadership through the implementation of systems and structures that allow for effective management. These will include the following:
- Conduct regular on-site support visits to schools/offices;
 - Represent the district at provincial and other relevant forums;
 - Coordinate and manage national, provincial and district priorities and projects;
 - Ensure effective and efficient utilisation of resources and information services; and
 - Work collaboratively to improve learner performance.
- b) Establish clear channels of communication by liaising with schools;
- c) Facilitate correct interpretation and ensure effective planning, implementation, monitoring and evaluation of policies;
- d) Conduct analysis of data collected in order to inform and improve teaching and learning;
- e) Facilitate and arrange workshops and training sessions on behalf of their sections/area of responsibility; and
- f) Any other reasonable function assigned by the employer within the job function.

C. COMPETENCIES:

- a) Monitoring and evaluation
- b) Performance Management
- c) Decision making and initiating action
- d) Adhering to principles and values
- e) Analysis and interpreting

- f) Writing and reporting
- g) Creating, conceptualising and innovating
- h) Organising and executing
- i) Coping with pressures and setbacks
- j) Time management

D. KNOWLEDGE AND SKILLS

- a) Knowledge of the constitution as well as other relevant Acts and Policies.
- b) Experience in research on the latest developments related to curriculum transformation.
- c) A good understanding of Matrix Management.
- d) Knowledge and understanding of ICT in Education, as it relates to teaching and learning in the classroom.
- e) Interpret, analyse and apply current legislation and departmental policies
- f) Supervisory, organizational and interpersonal skills.
- g) Proven written and verbal skills.
- h) Attention to details and a high level of accuracy, effective public relations and public speaking skills.
- i) Computer Literacy - MS Word, Ms Excel, MS Power Point and MS Outlook.

Additional KPAs:

3.1 DCES: Curriculum Support and Delivery

- a) Institutionalise the multi-disciplinary team approach within the Curriculum component;
- b) Ensure efficient and effective provisioning of LTSM for all institutions;
- c) Facilitate the management of the implementation of the curriculum;
- d) Support underperforming schools on NSC and School Based Assessment; and
- e) Assist in the application of Information and Communications Technology (ICT) and e-education.

3.2 DCES: Institutional Management Governance and Support

- a) Provide support to school principals, School Management Teams (SMTs) Governing Bodies (SGB) as well as education management and governance development (EMGD) unit;

- b) Ensure the implementation of school safety measures and other policies in institutions;
- c) Support, supervise, monitor and guide the effective and efficient implementation of Performance Management Systems (e.g. IQMS and PMDS); and
- d) Facilitate School Self Evaluation (SSE) processes and subsequent development and implementation of School Improvement Plans (SIPs).

3.3 DCES: Inclusive Education, Therapeutic and Learning Support

Facilitate and sustain the implementation of the following support programmes in schools with specific focus on:

- a) Inclusive education;
- b) Therapeutic services;
- c) Psychological services;
- d) Co-curricular services (Sports, Music, Values in Education and HIV AIDS);
- e) National School Nutrition Programme (NSNP); and
- f) Learner transport, and Oversee the administration of boarding bursaries in all boarding facilities of the circuit.

3.4 DCES: Management

- a) Monitor effective management, administration and governance of schools;
- b) Facilitate curriculum delivery through support in various ways;
- c) Facilitate performance management of school principals;
- d) To support e-education and administrative support to institutions; and
- e) Conduct focused school monitoring visits to facilitate compliance with national / provincial policies.

3.5 DCES: Whole School Evaluation (WSE)

To coordinate Whole School Evaluation (WSE) processes that includes the following:

- a) Carry out whole-school evaluations in districts;
- b) To provide training on School Self-Evaluations (SSE) and School Improvement Planning (SIP);
- c) Monitor schools on implementation of recommendations in the School Improvement Plan;

- d) Monitor the support provided by districts on implementation of recommendations in the SIP; and
- e) Retrieve information from school evaluation reports that can be used to compile provincial reports to the HoD.

4. SENIOR EDUCATION SPECIALIST (SES)

A. JOB PURPOSE

To clarify, monitor, implement policies in schools and render support and development to educators that fall under their area of responsibility.

(NB: SESs are field workers and are accountable to the DCES for their operations).

B. KEY PERFORMANCE AREAS (KPA's)

- a) Provide professional guidance through the implementation of systems and structures that allow for effective management. These will include the following:
 - Conduct regular on-site support visits to teachers in schools;
 - Represent the district at other relevant forums;
 - Coordinate and manage district priorities and projects;
 - Ensure effective and efficient utilisation of resources and information services; and
 - Work collaboratively with schools to improve learner performance.
- b) Facilitate correct interpretation and ensure effective planning, implementation, monitoring and evaluation of policies;
- c) Conduct analysis of data collected in order to inform and improve teaching and learning;
- d) Facilitate workshops and training sessions on behalf of their sections/area of responsibility;
- e) Collate and compile reports based on visits and provide feedback to learning institutions;
- f) Report to line managers regarding interventions and progress at learning schools; and any other reasonable function assigned by the employer within the job function.

C. COMPETENCIES:

- a) Monitoring and evaluation

- b) Adhering to principles and values
- c) Analysis and interpreting
- d) Writing and reporting
- e) Organising and executing
- f) Coping with pressures and setbacks
- g) Time management

D. KNOWLEDGE AND SKILLS

- a) Knowledge of the constitution as well as other relevant Acts and Policies.
- b) Knowledge and understanding of ICT in Education, as it relates to teaching and learning in the classroom.
- c) Interpret, analyse and apply current legislation and departmental policies
- d) Organizational and interpersonal skills.
- e) Written and verbal skills.
- f) Attention to details and a high level of accuracy.
- g) Computer Literacy - MS Word, Ms Excel, MS Power Point and MS Outlook.

Additional KPAs:

4.1 SES: Curriculum Support and Delivery (Subject Advisors - all phases)

- a) Monitor and support the implementation of the curriculum in the relevant subject;
- b) Ensure that educators have all the requisite curriculum and assessment documents for the subject;
- c) Guide and support educators in effectively delivering the curriculum in the classroom;
- d) Support teachers in strengthening their content knowledge and organising relevant/related co-curricular activities;
- e) Moderate school based assessment including School Based Assessment;
- f) Keep, analyse and interpret examination results (assessment of learners' and educators' progress) and draw up intervention strategies to provide professional guidance to educators/learners;
- g) Have a thorough knowledge and understanding of the relevant subject/phase Curriculum Assessment Policy Statements (CAPS); and

- h) Build CAPS knowledge and understanding among educators and Keep files/records regularly updated with recent and relevant subject policy documents and ensure that educators in schools have the same.

4.2 SES: Governance and Support

- a) Provide guidance to school principals, School Management Teams (SMTs) Governing Bodies (SGB).
- b) Facilitate the implementation of school safety measures and other policies in institutions.
- c) Support and guide the effective and efficient implementation of Performance Management Systems.
- d) Support School Self Evaluation (SSE) processes and subsequent development and implementation of School Improvement Plans (SIPs). Intervene on learner disciplinary matters.

4.3 SES: Special Institutional (LSEN) and Psychological Services

Facilitate the implementation of the following support programmes in LSEN and main stream schools:

- a) Inclusive Education;
- b) Therapeutic services;
- c) Psychological services; and
- d) Co- curricular services (Sports, Music, Values in Education and HIV AIDS)

5. LABOUR RELATIONS: CES/DCES/SES

A. Communication and Information Management

- a) Communicate with stakeholders on labour and other related issues (e.g. conditions of service) keeping them abreast on policies and collective agreements; and
- b) Strive to ensure a fair and equitable approach to labour relations with a view to achieving a stable employee – employer relationship.

B. Planning and Organising

- a) Support the development and implementation of labour relations policies / procedures;

- b) Plan and organise workshops regarding terms and conditions of service of employees;
and
- c) Develop a risk management plan to prevent labour disputes.

C. Developing Others

- a) Promotes constructive employee relations;
- b) Advises and works with Human Resources staff and other managers to maintain stability in the work environment; and
- c) Provides support on the interpretation of policies and collective agreements.

D. Managing Interpersonal Conflict and Resolving Problems

- a) Manages grievance procedures and complaints that may result to disputes;
- b) Anticipates, diffuses and resolves disagreements, confrontations, tensions and complaints in a practical and constructive manner;
- c) Leads negotiations by representing the employer in interaction with stakeholders (e.g. employee organisations); and
- d) Assists management in the administration of disciplinary processes.

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CHAPTER B: APPOINTMENTS, TRANSFER OF EDUCATORS IN TERMS OF OPERATIONAL REQUIREMENTS, POST STRUCTURE, SALARY AND QUALIFICATION RELATED MATTERS

- B.1 RELATIVE EDUCATION QUALIFICATION VALUE (REQV)**
- B.2 POST STRUCTURE**
- B.3 APPOINTMENTS IN EDUCATION**
- B.4 POSSIBLE CAREER PATH OPPORTUNITIES AND REQUIREMENTS FOR APPOINTMENT/UPGRADE/PROMOTION**
- B.5 ADVERTISING AND FILLING OF EDUCATOR POSTS**
- B.6 TRANSFER OF SERVING EDUCATORS IN TERMS OF OPERATIONAL REQUIREMENTS**
- B.7 POSITION OF A PRINCIPAL IN A CASE WHERE A SCHOOL IS REGRADED (UPGRADED OR DOWNGRADED)**
- B.8 SALARIES APPLICABLE TO EDUCATOR POSTS**
- B.9 SALARY ADJUSTMENTS**
- B.10 RECOGNITION FOR IMPROVEMENT IN REQV**
- B.11 DATES ON WHICH SALARIES OF EDUCATORS EMPLOYED AT AN INSTITUTION COMMENCE AND TERMINATE**
- B.12 INCORRECTLY GRANTED REMUNERATION**
- B.13 UNAUTHORISED REMUNERATION**

ANNEXURE

- Annexure B.1 Salary adjustments: December 1984 to July 1995
- Annexure B.2 Implementation of the broad band salary system on 1 July 1996
- Annexure B.3 Implementation of the new post and salary structure on 1 April 2003 per post level
- Annexure B.4 Educator salary scales July 1996 to July 2007 and OSD translation tables January 2008 (basic salaries)
- Annexure B.5 OSD key salary scale for institution-based and office-based educators (January 2008 -)
- Annexure B.6 OSD inclusive remuneration packages for office-based educators
- Annexure B.7 Educator non-OSD salary scales: July 2008 to May 2012
- Annexure B.8 Office-based educator non-OSD inclusive remuneration packages July 2005 – May 2012
- Annexure B.9 OSD salary scales for education therapists, psychologists and counsellors, post class codes and job title codes
- Annexure B.10 OSD rank and salary codes for institution-based and office-based educators
- Annexure B.11 July 2018 Equalisation Scale
- Annexure B.12 OSD Educator Salary Notches with Effect from 1 July 2019 for Full-Time Employees
- Annexure B.13 Minimum and Maximum Notches – With Effect from 1 July 2019

B.1 RELATIVE EDUCATION QUALIFICATION VALUE (REQV)**B.1.1 Definition**

A relative value is attached to an approved qualification or combination of qualifications in accordance with the measures as set out in the policy document *“Criteria for the*

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Evaluation and Recognition of Qualifications for Employment in Education obtainable from DBE.

Note: The recognition of diplomas for salary purposes is restricted to not more than two recognized post Grade 12 diplomas, to a maximum of REQV 15.

B.1.2 Requirements in Respect of REQV

REQV	Educational Value
10	Grade 12 or lower without a teacher's qualification
11	Grade 8, 9,10 or 11 plus a teacher's qualification of at least two years relevant training
12	Grade 12 plus one or two years relevant training
13	Grade 12 plus three years relevant training
14	Grade 12 plus four years relevant training
15	Grade 12 plus five years relevant training
16	Grade 12 plus six years relevant training. Only professionally qualified educators can be classified as REQV 16, provided such persons are in possession of a recognised completed degree.
17	Grade 12 plus seven years relevant training. To be regarded as having an REQV 17, a candidate must, in addition to the requirements for classification under REQV 16, also be in possession of at least a recognised master's degree or an approved NQF level 8- qualification.

B.2 POST STRUCTURE**B.2.1 Educator Posts (OSD for Institution and Office-Based Educators) (ELRC Collective Agreement 1 of 2008)**

B.2.1.1	School-based Educators	Post level
B.2.1.1.1	School-based Educator: General Classroom Teacher	
	Teacher REQV 13	1
	Teacher REQV 14 ⁺	1
	Senior Teacher REQV 13	1
	Senior Teacher REQV 14 ⁺	1
	Master Teacher REQV 13	1
	Master Teacher REQV 14 ⁺	1
B.2.1.1.2	School-based Educator: Manager	
	Departmental Head	2
	Deputy Principal	3
	Principal	4 (Excluding a principal of a one-person school who is on post level 1 and receives an allowance)
B.2.1.2	Office-based Educators: Specialists	
	Education Specialist	2
	Senior Education Specialist	3

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	Deputy Chief Education Specialist	5
	Chief Education Specialist	6

B.2.2 Implementation Date

The OSD post structure was implemented on 3 April 2008.

B.3 APPOINTMENTS IN EDUCATION

B.3.1 The concept 'appointment' includes the following:

B.3.1.1. Appointment in a full-time or part-time capacity. This includes employment in a shared capacity where more than one educator is appointed to a post.

B.3.1.2 The first appointment of a person as an educator by a department of education.

B.3.1.3 Appointment to a post on a higher post level than the post the educator occupied (promotion).

B.3.1.4 Appointment to a graded principal post refers to a P1, P2, P3, P4 or P5 principal post. Graded posts are posts on the same post level (post level 4), with different salary ranges applicable to each post.

A principal post can be upgraded/downgraded in terms of the school grading norms. A principal can also apply for another principal post on a higher or lower grade. Refer to paragraph B.7 and B.8.6 for the position of a principal when the school is up or downgraded and how his/her salary is determined.

B.3.1.5 The transfer of an educator to a higher, an equal or a lower post level within the same department or from one department to another.

B.3.1.6 The re-appointment, after a break in service, of an educator by a department of education.

B.3.1.7 The appointment of an educator can be in a permanent or temporary capacity. If the appointment is in a temporary capacity, it is for a fixed period. Appointment in a temporary capacity can either be to a substantive vacant post or as a substitute for another educator who is temporarily not occupying his/her post. (*Government Gazette No 22594, dated 24 August 2001*)

B.3.1.8 The HoD may, after consultation with the SGB of a public school, convert the temporary appointment of an educator to a post on the educator establishment of the public school into a permanent appointment in that post without the recommendation of the SGB. (*Section 6B of the EEA, 1998*)

B.3.1.9 An educator who is appointed in a temporary capacity (fixed term) or as a substitute for a period of more than 6 months, will receive the same benefits as a permanent educator (for example pension, medical aid subsidy, housing and service bonus). (*PSCBC resolution 1 of 2007, Government Gazette No. 30232, dated 29 August 2007*)

An educator who is appointed in a temporary capacity (fixed term) or as a substitute for a period of less than 6 months, will receive an amount equal to 37% of his/her basic salary

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in lieu of benefits. (*PSCBC resolution 1 of 2007, Government Gazette No. 30232, dated 29 August 2007*)

B.3.2 Minimum Requirements for Appointment for Institution-Based and Office-Based Educators

B.3.2.1 Educational qualifications, statutory requirements and experience

The educational qualifications, statutory requirements and experience required for appointment in education are as follows:

JOB TITLE	EDUCATIONAL QUALIFICATION	STATUTORY REQUIREMENTS	COMPETENCIES AND SKILLS		EXPERIENTIAL COMPETENCY	
			FUNCTIONAL FIELD	GENERIC		
3.2.1.1	School-based Educators					
(a)	School-based Educator: General Classroom Teacher					
	Teacher (REQV 13)	A recognised three-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	Basic knowledge of subject/ programme/ phase as provided for in the professional qualification.	<ol style="list-style-type: none"> Teaching and assessment skills. Extra- and co-curricular skills. Administrative skills. Able to interact with stakeholders. Communication skills. 	12 months probation
	Teacher (REQV 14 ⁺)	A recognised four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	Basic knowledge of subject/ programme/ phase as provided for in the professional qualification.	<ol style="list-style-type: none"> Teaching and assessment skills. Extra- and co-curricular skills. Administrative skills. Interaction with stakeholders. Communication skills. 	12 months probation
	Senior Teacher (REQV 13)	A recognised three-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	Experienced educator with good knowledge of subject/ programme/ phase as provided for in the professional qualification.	<ol style="list-style-type: none"> Good teaching and assessment skills. Extra- and co-curricular skills. Administrative skills. Interaction with stakeholders. Good communication skills. Is able to give guidance. 	Becomes a Senior Teacher once he/she reaches notch code 103.
	Senior Teacher (REQV 14 ⁺)	A recognised four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	Experienced educator with good knowledge of subject/ programme/ phase as provided for in the professional qualification.	<ol style="list-style-type: none"> Good teaching and assessment skills. Extra- and co-curricular skills. Administrative skills. Interaction with stakeholders. Good communication skills. Is able to give guidance. 	Becomes a Senior Teacher once he/she reaches notch code 103.

JOB TITLE	EDUCATIONAL QUALIFICATION	STATUTORY REQUIREMENTS	COMPETENCIES AND SKILLS		EXPERIENTIAL COMPETENCY
			FUNCTIONAL FIELD	GENERIC	
Master Teacher (REQV 13)	A recognised three-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	Experienced educator with good knowledge of subject/programme/phase as provided for in the professional qualification.	<ol style="list-style-type: none"> 1. Good teaching and assessment skills. 2. Extra- and co-curricular skills. 3. Administrative skills. 4. Interaction with stakeholders. 5. Good communication skills. 6. Is able to give guidance. 	Becomes a Master Teacher once he/she reaches notch code 120.
Master Teacher (REQV 14)	A recognised four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	Experienced educator with good knowledge of subject/programme/phase as provided for in the professional qualification.	<ol style="list-style-type: none"> 1. Good teaching and assessment skills. 2. Extra- and co-curricular skills. 3. Administrative skills. 4. Interaction with stakeholders. 5. Good communication skills. 6. Is able to give guidance. 	Becomes a Master Teacher once he/she reaches notch code 120.

(b) School-based Educator: Manager					
Departmental Head	A recognised three- or four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	Advanced knowledge of teaching as provided for in the professional qualification.	<ol style="list-style-type: none"> 1. Good teaching and assessment skills. 2. Good extra- and co-curricular skills. 3. Good people management skills. 4. Good administrative skills. 5. Good communication skills. 	3 years of actual teaching experience.
Deputy Principal	A recognised three- or four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	<ol style="list-style-type: none"> 1. Advanced knowledge of teaching as provided for in the professional qualification. 2. Good management skills. 3. Leadership. 	<ol style="list-style-type: none"> 1. Good teaching and assessment skill. 2. Good extra- and co-curricular skills. 3. Good people management skills. 4. Good administrative skills. 5. Good communication skills. 	5 years of actual teaching experience.

JOB TITLE	EDUCATIONAL QUALIFICATION	STATUTORY REQUIREMENTS	COMPETENCIES AND SKILLS		EXPERIENTIAL COMPETENCY
			FUNCTIONAL FIELD	GENERIC	
Principal	A recognised three- or four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	<ol style="list-style-type: none"> Good knowledge of teaching as provided for in the professional qualification. Good management skills. Good leadership skills. 	<ol style="list-style-type: none"> Good co-curricular skills. Good people management skills. Good administrative skills. Good communication skills. Good knowledge of applicable educator legislation, regulations and policies. 	7 years of actual teaching experience.

3.2.1.2 Office-based Educators						
a) Office-based Educator: Specialist						
Education Specialist	A recognised three- or four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.	<ol style="list-style-type: none"> Leader Communicator Financial planner and manager Strategic planner and transformer Policy developer Researcher Curriculum developer Staff developer Organiser 	Roles of: <ol style="list-style-type: none"> Leader Communicator Financial planner and manager Strategic planner and transformer Policy developer Researcher Curriculum developer Staff developer Organiser 	Generic Skills: <ol style="list-style-type: none"> Leadership Communication Financial planning and management Strategic planning and transformation Policy development Researching Curriculum developing Staff developing Organising 	3 years' experience in the educational field.
Senior Education Specialist	A recognised three- or four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.			5 years' experience in the educational field.	
Deputy Chief Education Specialist	A recognised three- or four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.			8 years' experience in the educational field.	
Chief Education Specialist	A recognised three- or four-year qualification, which includes professional teacher education.	Registration with SACE as professional educator.			9 years' experience in the educational field.	

- B.3.2.1.3 Notwithstanding the requirements set out in paragraph B.3.2.1.1 and B.3.2.1.2, a person appointed to anyone of the following posts, is not required to be a qualified educator but must comply with the relevant requirements for appointment as set out in the document “*Criteria for the Evaluation and Recognition of Qualifications for Employment in Education*”.
- (a) Agricultural Technology
 - (b) Civil Technology
 - (c) Computer Applications Technology
 - (d) Dance Studies
 - (e) Design
 - (f) Dramatic Arts
 - (g) Education Psychologists
 - (h) Electrical Technology
 - (i) Engineering Graphics and Design
 - (j) Equine Studies
 - (j) Hospitality Studies
 - (k) Information Technology
 - (l) Maritime Economics
 - (m) Mechanical Technology
 - (n) Music
 - (o) Nautical Science
 - (p) Occupational Therapists
 - (q) Psychologists
 - (r) School Social Workers
 - (s) Vocational fields in Special Needs Education
 - (t) Physiotherapists
 - (u) Speech Therapists
 - (v) Visual Arts
- B.3.2.1.4 Notwithstanding the requirements set out in paragraph B.3.2.1.2, the Minister may approve the appointment, to office-based educator posts, of persons who have not been trained as educators in cases where such training is not a pre-requisite to perform the duties attached to the specific educator post, but who are otherwise suitably qualified to perform such duties. The total number of such appointments to posts in provincial departments of education, as well as DBE, may not exceed 100.
- B.3.2.1.5 Notwithstanding the requirements set out in paragraph B.3.2.1.1, a person with REQV 11 or 12 and who is already employed as an educator in terms of previous measures that provided for his/her appointment, may retain his/her employment status in terms of the measures that applied when he/she was appointed. (*ELRC Resolution 4 of 2001*)
- B.3.2.1.6 With the exception of persons appointed to posts referred to in paragraphs B.3.2.1.3, a person who is appointed from outside education and who is not appropriately qualified, may only be appointed in a temporary capacity. These appointments are regarded as individual relaxations of the requirements.
- B.3.2.1.7 A person who qualifies for appointment in a permanent capacity in terms of paragraphs B.3.2.1.1 to B.3.2.1.8, may also be promoted to an appropriate post on a higher post level.
- B.3.2.1.8 Notwithstanding the provisions in paragraphs B.3.2.1.3 to B.3.2.1.7, preference should be given in all cases to appropriately qualified applicants for any educator post.

B.3.2.2 Registration with SACE (*South African Council for Educators Act, Act No 31 of 2000*)

- B.3.2.2.1 In order to qualify for appointment as an educator, a person must be registered with SACE.
- B.3.2.2.2 Notwithstanding the requirements set out in paragraph B.3.2.1.2, the Minister may approve the appointment of office-based educators who have not been trained as educators, but who are otherwise suitably qualified to perform the required duties (refer to paragraph B.3.2.1.4) and who are not registered with SACE.

B.3.3 Appointment on probation (*Regulation 3 of the Regulations regarding the terms and conditions of employment of educators*)

- B.3.3.1 An educator's first appointment to education in a permanent capacity will be on probation for a period of 12 months, which may be extended, on good cause shown, for a further period not exceeding 12 months. An educator must be informed in writing of the intention to extend his/her probation period.
- B.3.3.2 An employer may approve the secondment, transfer or promotion during his/her period of probation, provided that the educator remains on probation for a total period, including the period served in the former post, of at least 12 months.
- B.3.3.3 If deemed necessary, the employer may require that the appointment of an educator to a promotion level to be on probation, provided that the conditions in paragraphs B.3.3.1 and B.3.3.2 apply.
- B.3.3.4 If the performance of an educator on probation complies with the relevant requirements as set out in the performance management system, his/her permanent appointment may be confirmed.
- B.3.3.5 An educator's permanent appointment will only become effective once he/she is informed in writing by the employer to that effect. The employer must inform the educator within 6 months after expiry of the probation period or extended probation period of the educator's permanent appointment or otherwise.

B.3.4 Re-appointment of Educators**B.3.4.1 Educators who have retired or have retired prematurely**

- B.3.4.1.1 Subject to the general policy prescriptions applicable to the appointment of educators, every re-appointment of an educator who has retired or has been retired on pension before reaching his/her retirement age must be approved by the HoD or by the person to whom he/she has delegated such authority. Re-appointment means any form of re-employment in a full-time or part-time capacity of an educator who has retired or has been retired on pension prematurely in terms of any of the approved measures.
- B.3.4.1.2 The principles referred to below must be taken into account in considering such re-appointments. The HoD or the person to whom he/she has delegated the responsibility, will decide on the re-appointment concerned after he/she has considered the following principles and the extent to which they have been complied with:

- (a) Whether the re-appointment of persons who have, at their own request, retired prematurely on reduced pension benefits, may be deemed to be in the interest of the State
- (b) The only consideration must be the interests of education, which includes the interests of the department of education, the learner, the school and the State.
- (c) Other applicants who comply with the prescribed requirements for appointment, and young entrants to the profession in particular, must be given preference over persons who have already had the opportunity of an extensive career in education.

B.3.4.2 Educators whose services have been terminated due to rationalisation/re-organisation prior to 31 May 1996

B.3.4.2.1 Subject to the general policy prescriptions applicable to the appointment of educators, every re-appointment of an educator whose service has been terminated due to rationalisation/re-organisation must be approved by the HoD or by the person to whom he/she has delegated such authority. Re-appointment means any form of re-employment in a full-time or part-time capacity of an educator whose services have been terminated due to rationalisation/re-organisation.

B.3.4.2.2 In considering a person whose services have been terminated due to rationalisation/re-organisation and who has not been given the option of appointment to another suitable post, the termination of his/her services will not prejudice him/her being considered for re-appointment.

B.3.4.2.3 In the absence of sound reasons, the re-appointment of persons whose services have been terminated owing to rationalisation/re-organisation and who have been given the opportunity of being transferred to another suitable post, but who have nevertheless exercised the choice of retiring on pension prematurely, will be deemed not to be in the interest of the State.

Note: "Suitable post" in this regard means a post of a grading at least equal to the one from which the educator concerned has been retired and which, given all the relevant circumstances of the person concerned, is such that he/she may reasonably be expected to accept appointment to such position.

B.3.4.3 Educators who have retired on grounds of permanent incapacity

B.3.4.3.1 The application for re-appointment of persons who have retired on pension prematurely on grounds of permanent incapacity and whose state of health has improved to such an extent that the prescribed health requirements are met, will be considered, bearing in mind the principles in paragraph B.3.4.1.1 and B.3.4.1.2.

B.3.4.4 Educators who have taken a Voluntary Severance Package (VSP) (Government Gazette No 17226, dated 31 May 1996), or an Employee Initiated Severance Package (EISP) (Government Gazette No 29056, dated 21 July 2006) or a Mutually Agreed to Severance Package (MASP) (PSCBC Resolution 12 of 2000)

B.3.4.4.1 The principles contained in paragraphs B.3.4.1.1 and B.3.4.1.2 apply.

- B.3.5 Occupation Specific Dispensation (OSD) for education therapists, psychologists, counsellors and psychometrists: Career paths, remuneration and post structure, appointment requirements, recognition of experience, grade progression opportunities and requirements** (*ELRC Collective Agreement 1 of 2012: Occupation Specific Dispensation for Education Therapists, Psychologists and Counsellors in Public Education*)
- B.3.5.1 All the provisions in Chapter B are applicable to education therapists, psychologists, counsellors and psychometrists, except for career paths, remuneration and post structure, appointment requirements, recognition of experience and progression, which are dealt with in this section (paragraph 3.5).
- B.3.5.2 These measures are applicable retrospectively to 1 July 2010.

B.3.5.3 OSD FOR EDUCATION THERAPISTS EMPLOYED IN PUBLIC EDUCATION, CAREER PATHS, REMUNERATION AND POST STRUCTURE, APPOINTMENT REQUIREMENTS, RECOGNITION OF EXPERIENCE, GRADE PROGRESSION OPPORTUNITIES AND REQUIREMENTS

A three or four-year tertiary educational qualification (REQV 13 or REQV 14⁺) plus registration with the Health Professions Council of South Africa, as well as registration with the South African Council for Educators (SACE) (where applicable), is a minimum requirement for employment.

CAREER STREAM: SCHOOL-BASED EDUCATION THERAPIST						
Post	Salary levels and scales	Appointment requirements			Recognition of experience on appointment	Grade progression requirement/measures
		Qualifications	Registration	Experience		
CAREER PATH						
Education Therapist Grade 1	2010 (Notch) 173,949 176,562 179,211 181,899 184,632 187,398 190,212 193,062 195,957 198,894	Appropriate qualification that allows for the required registration with the HPCSA.	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA). Registration with the South African Council for Educators (SACE). 	<ul style="list-style-type: none"> None after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified therapists who performed Community Service, as required in South Africa. One year relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified therapists, of whom it is not required to perform 	Not applicable.	Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements, as well as the following experiential competency: Grade progression: Satisfactory performance: <ul style="list-style-type: none"> Ten (10) years actual service and/or recognizable experience after compliance with the appointment requirements for this Grade.

CAREER STREAM: SCHOOL-BASED EDUCATION THERAPIST					
	Salary levels	Appointment requirements	Recognition of	Grade progression	
		Community Service, as required in South Africa.		<ul style="list-style-type: none"> ▪ Grade progression shall become effective on the 1st day of the month following the date on which the Education Therapist met all the requirements. ▪ Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service and/or recognizable experience after compliance with the appointment requirements in the grade, with at least four (4) annual assessment ratings of good performance in Grade 1. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Therapist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012. 	
Education Therapist	(Notch)	<ul style="list-style-type: none"> • Registration with the Health Professions • A minimum of ten (10) years relevant experience 	Not applicable.	Compliance with the educational qualifications, statutory requirements,	

CAREER STREAM: SCHOOL-BASED EDUCATION THERAPIST			
Grade	Salary levels	Appointment requirements	Recognition of
Grade 2	204,906 207,981 211,101 214,272 217,485 220,749 224,061 227,421 230,832 234,297	registration with the HPCSA. with the Council of South Africa (HPCSA). • Registration with the South African Council for Educators (SACE). • Minimum of eleven (11) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified therapists, of whom it is not required to perform Community Service, as required in South Africa.	prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency: Grade progression: Satisfactory performance: <ul style="list-style-type: none"> ▪ Ten (10) years actual service and/or recognizable experience after compliance with the appointment requirements for this Grade. ▪ Grade progression shall become effective from the 1st day of the month following the date on which the Education Therapist met all the requirements. ▪ Grade progression shall be effective from 1 January 2012. Accelerated grade progression: Good performance <ul style="list-style-type: none"> ▪ Five (5) years actual service and/or recognizable experience after compliance with the appointment requirements in the grade, with at least four (4) annual assessment ratings of good performance in Grade 2.

CAREER STREAM: SCHOOL-BASED EDUCATION THERAPIST					
	Salary levels	Appointment requirements	Recognition of	Grade progression	
Education Therapist Grade 3	(Notch) 241,374 244,998 248,673 252,402 256,188 260,031 263,934 267,894 271,914 275,988 280,131 284,331 288,600 292,926	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA). Registration with the South African Council for Educators (SACE). 	<ul style="list-style-type: none"> A minimum of twenty (20) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified therapists who performed Community Service, as required in South Africa. Minimum of twenty-one (21) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified therapists, of whom it is not required to perform Community Service, as required in South Africa. 	<ul style="list-style-type: none"> Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Therapist met all the requirements. Accelerated grade progression shall be effective from 1 January 2012 	<ul style="list-style-type: none"> Accelerated pay progression 2 notches per assessment cycle. Based on assessment of good performance. Limited to maximum of 20% per annum of the number of education therapists on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> Promotion to higher vacant advertised post.
	(Notch)	Registration with the Health Professions Council for Education	Not applicable.	Compliance with the educational qualifications, statutory requirements,	

CAREER STREAM: SCHOOL-BASED EDUCATION THERAPIST				
Post	Salary levels	Appointment requirements	Recognition of	Grade progression
Chief Education Therapist Grade 1	256,188 260,031 263,934 267,894 271,914 275,988 280,131 284,331	registration with the Health Professions Council of South Africa (HPCSA) in the relevant profession (where applicable) Council of South Africa (HPCSA) in the relevant profession • Registration with the South African Council for Educators (SACE),		prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency: Grade progression: Satisfactory performance: <ul style="list-style-type: none"> ▪ Eight (8) years actual service in the position of Chief Education Therapist Grade 1. ▪ Grade progression shall become effective from the 1st day of the month following the date on which the Chief Education Therapist met all the requirements. ▪ Grade progression shall be effective from 1 January 2012. Accelerated grade progression: Good Performance <ul style="list-style-type: none"> ▪ Five (5) years actual service in the position of Chief Education Therapist Grade 1, with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Chief

CAREER STREAM: SCHOOL-BASED EDUCATION THERAPIST					
	Salary levels	Appointment requirements		Recognition of	Grade progression
					Education Therapist met all the requirements. <ul style="list-style-type: none"> Accelerated grade progression shall be effective from 1 January 2012.
Chief Education Therapist Grade 2	(Notch) 292,926 297,321 301,779 306,306 310,902 315,567 320,301 325,104	No direct appointment on this Grade	No direct appointment on this Grade	No direct appointment on this Grade	Not applicable. Accelerated pay progression <ul style="list-style-type: none"> 2 notches per assessment cycle. Based on assessment of good Performance. Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <u>Promotion</u> <ul style="list-style-type: none"> Promotion to higher vacant advertised post

CAREER STREAM: OFFICE-BASED EDUCATION THERAPIST					
Post	Salary levels and scales	Appointment requirements		Recognition of experience on appointment	Grade progression requirement/measures
		Registration	Experience		

CAREER STREAM: OFFICE-BASED EDUCATION THERAPIST					
Post	Salary levels and	Qualifications	Appointment requirements	Recognition of experience on	Grade progression requirement/measures
CAREER PATH					
2010					
Chief Education Therapist Grade 1	(Notch) 256,188 260,031 263,934 267,894 271,914 275,988 280,131 284,331	Appropriate qualification that allows for the required registration with the HPCSA.	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) in the relevant profession. Registration with the South African Council for Educators (SACE), (where applicable) 	<ul style="list-style-type: none"> A minimum of 3 years' appropriate experience after registration with the Health Professions Council of South Africa (HPCSA) in the relevant profession (where applicable) 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service in the position of Chief Education Therapist Grade 1. Grade progression shall become effective from the 1st day of the month following the date on which the Chief Education Therapist met all the requirements. Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p>

CAREER STREAM: OFFICE-BASED EDUCATION THERAPIST					
Post	Salary levels and	Appointment requirements	Recognition of experience on	Grade progression requirement/measures	
Chief Education Therapist Grade 2	(Notch) 292,926 297,321 301,779 306,306 310,902 315,567 320,301 325,104	No direct appointment on this Grade	No direct appointment on this Grade	<ul style="list-style-type: none"> ▪ Five (5) years actual service in the position of Chief Education Therapist Grade 1, with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Chief Education Therapist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012. 	
Education Therapist Specialist Grade 1	(Notch) 284,331 288,600	Appropriate qualification that allows for the required registration with the HPCSA.	Registration with the Health Professions Council of South Africa	<ul style="list-style-type: none"> ▪ A minimum of three (3) years appropriate experience after registration with the Health Professions 	<p>Accelerated pay progression</p> <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle. ▪ Based on assessment of good Performance. Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> ▪ Promotion to higher vacant advertised post <p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment</p>

CAREER STREAM: OFFICE-BASED EDUCATION THERAPIST					
Post	Salary levels and	Appointment requirements		Recognition of experience on	Grade progression requirement/measures
	292,926 297,321 301,779 306,306 310,902 315,567	(HPCSA) in the relevant profession with the South African Council for Educators (SACE) (where applicable).	Council of South Africa (HPCSA) in the relevant profession.		<p>requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> ▪ Eight (8) years actual service in the position of Education Therapist Specialist Grade 1. ▪ Grade progression shall become effective from the 1st day of the month following the date on which the Education Therapist Specialist met all the requirements. ▪ Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service in the position of Education Therapist Specialist Grade 1, with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the

CAREER STREAM: OFFICE-BASED EDUCATION THERAPIST					
Post	Salary levels and	Appointment requirements	Recognition of experience on	Grade progression requirement/measures	
Education Therapist Specialist Grade 2	(Notch) 325,104 329,979 334,926 339,951 345,048 350,226 355,479 360,810	No direct appointment on this grade.	No direct appointment on this grade.	Education Therapist Specialist met all the requirements. <ul style="list-style-type: none"> Accelerated grade progression shall be effective from 1 January 2012. 	<p>Accelerated pay progression</p> <ul style="list-style-type: none"> 2 notches per assessment cycle. Based on assessment of good performance. Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> Promotion to higher vacant advertised post
Senior Education Therapist Specialist Grade 1	(Package) 475,806 482,943 490,191 497,544 505,005 512,583 520,269 528,072	Registration with the Health Professions Council of South Africa (HPCSA) in the relevant profession <ul style="list-style-type: none"> Registration with the South African Council for Educators (SACE) (where applicable). 	<p>Not applicable.</p> <ul style="list-style-type: none"> A minimum of three (3) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in the relevant profession. 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service in the position of Senior 	

CAREER STREAM: OFFICE-BASED EDUCATION THERAPIST					
	Post	Salary levels and	Appointment requirements	Recognition of experience on	Grade progression requirement/measures
					<p>Education Therapist Specialist Grade 1.</p> <ul style="list-style-type: none"> ▪ Grade progression shall become effective from the 1st day of the month following the date on which the Senior Education Therapist Specialist met all the requirements. ▪ Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service in the position of Senior Education Therapist Specialist Grade 1, with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Senior Education Therapist Specialist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012.

CAREER STREAM: OFFICE-BASED EDUCATION THERAPIST						
Post	Salary levels and	Appointment requirements		Recognition of experience on	Grade progression requirement/measures	
Senior Education Therapist Specialist Grade 2	(Package) 544,035 552,195 560,475 568,881 577,413 586,077 594,870 603,792 612,849 622,041	No direct appointment on this grade.	No direct appointment on this grade.	No direct appointment on this grade.	Not applicable.	<p>Accelerated pay progression</p> <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle. ▪ Based on assessment of good performance. ▪ Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> ▪ Promotion to higher vacant advertised post

B.3.5.4 OSD FOR COUNSELLORS/PsYCHOMETRISTS EMPLOYED IN PUBLIC EDUCATION, CAREER PATHS, REMUNERATION AND POST STRUCTURE, APPOINTMENT REQUIREMENTS, RECOGNITION OF EXPERIENCE, GRADE PROGRESSION OPPORTUNITIES AND REQUIREMENTS

CAREER STREAM: SCHOOL-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST					
Post	Salary levels and scales	Appointment requirements		Recognition of experience on appointment	Grade progression requirement/measures
		Qualifications	Registration		
CAREER PATH 2010					
Education Counsellor/ Psychometrist Grade 1	(Package) 318,312 323,068 327,933 332,853 337,845 342,912 348,051 353,274	Appropriate qualification that allows registration with the HPCSA as Counsellor or Psychometrist.	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. Registration with the South African Council for Educators (SACE). 	<ul style="list-style-type: none"> None after registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements, as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service and/or recognisable experience after compliance with the appointment requirements in the Grade Grade progression shall become effective from the 1st day of the month following the date on which the Education Counsellor or Psychometrist met all the requirements.

CAREER STREAM: SCHOOL-BASED EDUCATION COUNSELLOR / PSYCHOMETRIST						
	Salary levels	Appointment requirements	Recognition of	Grade progression		
				<ul style="list-style-type: none"> ▪ Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service and/or recognisable experience after compliance with the appointment requirements in the Grade with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Counsellor or Psychometrist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012. 		
Education Counsellor/ Psychometrist	(Package) 363,954	<ul style="list-style-type: none"> • Registration with the Professions Council of Health Practitioners 	None	Compliance with the educational qualifications, statutory requirements, prescribed training and competencies	<ul style="list-style-type: none"> • A minimum of eight (8) years appropriate experience as Counsellor 	

CAREER STREAM: SCHOOL-BASED EDUCATION COUNSELLOR / PSYCHOMETRIST					
Grade	Salary levels	Appointment requirements	Recognition of	Grade progression	
Grade 2	369,411 374,952 380,577 386,266 392,079 397,962 403,932	<p>Counsellor or Psychometrist.</p> <p>South Africa (HPCSA) as Counsellor or Psychometrist.</p> <ul style="list-style-type: none"> Registration with the South African Council for Educators (SACE). <p>after registration with the Health Professions Council for South Africa (HPCSA) as Counsellor or Psychometrist.</p>		<p>for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual and/or recognisable experience after compliance with the appointment requirements in the Grade Grade progression shall become effective from the 1st day of the month following the date on which the Education Counsellor or Psychometrist met all the requirements. Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> Five (5) years actual service and/or recognisable experience after compliance with the appointment requirements in the Grade, with at least four (4) annual 	

CAREER STREAM: SCHOOL-BASED EDUCATION COUNSELLOR / PSYCHOMETRIST					
	Salary levels	Appointment requirements	Recognition of	Grade progression	
				assessment ratings of good performance. <ul style="list-style-type: none"> ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Counsellor or Psychometrist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012. 	
	(Package) 416,142 422,382 428,718 435,147 441,672 448,299 455,022 461,847			Accelerated pay progression <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle. ▪ Based on assessment of good performance. ▪ Limited to maximum of 20% per annum of the number of education therapists on this Grade in the provincial department of education. <u>Promotion</u> <ul style="list-style-type: none"> ▪ Promotion to higher vacant advertised post. 	
	(Package)		None		

CAREER STREAM: SCHOOL-BASED EDUCATION COUNSELLOR / PSYCHOMETRIST					
	Salary levels	Appointment requirements	Recognition of	Grade progression	
Chief Education Counsellor/ Psychometrist Grade 1	416,142 422,382 428,718 435,147 441,671 448,299 455,022 461,847	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. Registration with the South African Council for Educators (SACE), where applicable. 	<ul style="list-style-type: none"> A minimum of three (3) years appropriate experience as Counsellor after registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service in the position of Chief Education Counsellor Grade 1. Grade progression shall become effective from the 1st day of the month following the date on which the Chief Education Counsellor or Chief Education Psychometrist met all the requirements. Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> Five (5) years actual service in the position of Chief Education Counsellor Grade 	

CAREER STREAM: SCHOOL-BASED EDUCATION COUNSELLOR / PSYCHOMETRIST						
	Salary levels	Appointment requirements	Recognition of	Grade progression		
				<p>or Chief Education Psychometrist Grade 1 with at least four (4) annual assessment ratings of good performance.</p> <ul style="list-style-type: none"> ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Chief Education Counsellor or Chief Education Psychometrist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012. 		
Chief Education Counsellor/ Psychometrist Grade 2	(Package) 475,806 482,943 490,191 497,544 505,005 512,583 520,269 526,072 535,995	No direct appointment on this Grade	None	<p>Accelerated pay progression</p> <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle. ▪ Based on assessment of good performance. ▪ Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p>		

CAREER STREAM: SCHOOL-BASED EDUCATION COUNSELLOR / PSYCHOMETRIST			
Post	Salary levels	Appointment requirements	Recognition of experience on appointment
			<p>Grade progression</p> <ul style="list-style-type: none"> Promotion to higher vacant advertised post

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR / PSYCHOMETRIST				
Post	Salary levels and scales	Appointment requirements		Recognition of experience on appointment
		Qualifications	Registration	
Education Counsellor/ Psychometrist Grade 1	2010 (Package) 318,312 323,068 327,933 332,853 337,845 342,912 348,051 353,274	Appropriate qualification that allows registration with the HPCSA as Counsellor or Psychometrist.	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. Registration with the South African 	<ul style="list-style-type: none"> None after registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist.
CAREER PATH	2010			<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements, as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p>

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST				
Post	Salary levels and	Appointment requirements	Recognition of	Grade progression
		Council for Educators, (SACE), where applicable.		<p>Eight (8) years actual service and/or recognisable experience after compliance with the appointment requirements in the Grade</p> <p>Grade progression shall become effective from the 1st day of the month following the date on which the Education Counsellor or Psychometrist met all the requirements.</p> <p>Grade progression shall be effective from 1 January 2012.</p> <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service and/or recognisable experience after compliance with the appointment requirements in the Grade with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST					
Post	Salary levels and	Appointment requirements	Recognition of	Grade progression	Education
				<p>Counsellor or Psychometrist met all the requirements.</p> <ul style="list-style-type: none"> ▪ Accelerated grade progression shall be effective from 1 January 2012. 	
Education Counsellor/ Psychometrist Grade 2	(Package) 363,954 369,411 374,952 380,577 386,266 392,079 397,962 403,932	<ul style="list-style-type: none"> • Registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. • Registration with the South African Council for Educators (SACE), where applicable. 	None	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> ▪ Eight (8) years actual and/or recognisable experience after compliance with the appointment requirements in the Grade <p>Grade progression shall become effective from the 1st day of the month following the date on which the Education Counsellor or Psychometrist met all the requirements.</p>	<ul style="list-style-type: none"> • A minimum of eight (8) years appropriate experience as Counsellor after registration with the Health Professions Council for South Africa (HPCSA) as Counsellor or Psychometrist.

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST					
	Description	Salary levels and	Appointment requirements	Recognition of	Grade progression
					<p>Grade progression shall be effective from 1 January 2012.</p> <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service and/or recognisable experience after compliance with the appointment requirements in the Grade, with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Counsellor or Psychometrist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012.
	Education Counsellor/ Psychometrist Grade 3	(Package) 416,142 422,382 428,718 435,147			<p>Accelerated pay progression</p> <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle. ▪ Based on assessment of good performance.

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CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST					
	Salary levels and	Appointment requirements		Recognition of	Grade progression
	441,672 448,299 455,022 461,847				<ul style="list-style-type: none"> Limited to maximum of 20% per annum of the number of education therapists on this Grade in the provincial department of education. <p>Promotion</p> <ul style="list-style-type: none"> Promotion to higher vacant advertised post.
Chief Education Counsellor/ Psychometrist Grade 1	(Package) 416,142 422,382 428,718 435,147 441,671 448,299 455,022 461,847	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. Registration with the South African Council for Educators (SACE), where applicable. 	<ul style="list-style-type: none"> A minimum of three (3) years appropriate experience as Counsellor after registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. 	None	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service in the position of Chief Education Counsellor Grade 1. Grade progression shall become effective from the 1st day of the month following the date on which the Chief Education Counsellor or Chief Education Psychometrist met all the requirements.

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST						
	Salary levels and	Appointment requirements	Recognition of	Grade progression		
				<ul style="list-style-type: none"> ▪ Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service in the position of Chief Education Counsellor Grade 1 or Chief Education psychometrist Grade 1 with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Chief Education Counsellor or Chief Education Psychometrist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012. 		
	(Package) 475,806 482,943	No direct appointment on this Grade	No direct appointment on this Grade	No direct appointment on this Grade	None	<p>Accelerated pay progression</p> <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle.
	Chief Education Counsellor/ Psychometrist					

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST				
	Salary levels and	Appointment requirements	Recognition of	Grade progression
Grade 2	490,191 497,544 505,005 512,583 520,269 526,072 535,995			<ul style="list-style-type: none"> ▪ Based on assessment of good performance. ▪ Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> ▪ Promotion to higher vacant advertised post
Senior Education Counsellor/ Psychometrist Specialist Grade 1	(Package) 512,583 520,269 526,072 535,995 544,035 552,195 560,475 568,881	<ul style="list-style-type: none"> • Registration with the Health Professions Council of South Africa (HPCSA) as Counsellor or Psychometrist. • Registration with the South African Council for Educators (SACE), where applicable. 	Not applicable.	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> ▪ Eight (8) years actual service in the position of Senior Education Counsellor Specialist Grade 1 or Senior Education Psychometrist Specialist Grade 1 ▪ Grade progression shall become effective from the 1st day of the month following the date on which the Senior Education Counsellor

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST					
	Salary levels and	Appointment requirements	Recognition of	Grade progression	
				<p>Specialist or Senior Education Psychometrist Specialistmet all the requirements.</p> <ul style="list-style-type: none"> ▪ Grade progression shall be effective from 1 January 2012. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service in the position of Senior Education Counsellor Specialist Grade 1, or Senior Education Psychometrist Specialist Grade 1 with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Senior Education Counsellor Specialist or Senior Education Psychometrist Specialistmet all the requirements. ▪ Accelerated grade progression shall be 	

CAREER STREAM: OFFICE-BASED EDUCATION COUNSELLOR /PSYCHOMETRIST						
	Post	Salary levels and	Appointment requirements	Recognition of	Grade progression	
	Senior Education Counsellor/ Psychometrist Specialist Grade 2	(Package) 586,077 594,870 603,792 612,849 622,041 631,371 640,842	No direct appointment on this grade.	No direct appointment on this grade.	No direct appointment on this grade.	<p>Grade progression effective from 1 January 2012.</p> <p>Accelerated pay progression</p> <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle. ▪ Based on assessment of good performance. Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> ▪ Promotion to higher vacant advertised post

B.3.5.5 OSD FOR PSYCHOLOGISTS EMPLOYED IN PUBLIC EDUCATION, CAREER PATHS, REMUNERATION AND POST STRUCTURE, APPOINTMENT REQUIREMENTS, RECOGNITION OF EXPERIENCE, GRADE PROGRESSION OPPORTUNITIES AND REQUIREMENTS

CAREER STREAM: SCHOOL-BASED EDUCATION PSYCHOLOGIST						
Post	Salary levels and scales	Appointment requirements			Recognition of experience on appointment	Grade progression requirement/measures
		Qualifications	Registration	Experience		
CAREER PATH						
	2010					
Education Psychologist Grade 1	(Package) 392,079 397,962 403,932 409,992 416,142 422,382 428,718 435,147	Appropriate qualification that allows registration with the HPCSA as Psychologist in a relevant registration category.	Registration with the Health Professions Council of South Africa (HPCSA) as Psychologist in a relevant registration category. <ul style="list-style-type: none">Registration with the South African Council for Educators (SACE), where applicable.	<ul style="list-style-type: none"> None after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified Psychologist who performed Community Service, as required in South Africa. One (1) year relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified psychologists, of whom it is not required to perform Community Service, as required in South Africa. 	None	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements, as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service and/or recognizable experience after compliance with the appointment requirements for this Grade. Grade progression shall become effective from the 1st day of the month following the date on which the Education Psychologist met all the requirements.

CAREER STREAM: SCHOOL-BASED EDUCATION PSYCHOLOGIST					
	Salary levels	Appointment requirements	Recognition of	Grade progression	
Education Psychologist Grade 2	(Package) 461,547 468,777 475,806 482,943 490,191 497,544 505,005	<ul style="list-style-type: none"> Appropriate qualification that allows registration with the HPCSA as Psychologist in a relevant registration category. Registration with the Health Professions Council of South Africa (HPCSA) as a psychologist in a relevant registration category. Minimum of eight (8) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified psychologist who performed Community Service, as required in South Africa. 	None	<ul style="list-style-type: none"> Grade progression shall be effective from 1 January 2011. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> Five (5) years actual service and/or recognisable experience after compliance with the appointment requirements in the grade, with at least four (4) annual assessment ratings of good performance. Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Psychologist met all the requirements. Accelerated grade progression shall be effective from 1 January 2012. 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements, as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p>

CAREER STREAM: SCHOOL-BASED EDUCATION PSYCHOLOGIST				
	Salary levels	Appointment requirements	Recognition of	Grade progression
	512,583	<ul style="list-style-type: none"> Registration with the South African Council for Educators (SACE), where applicable. Minimum of nine (9) years' relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified psychologists, of whom it is not required to perform Community Service, as required in South Africa. 		<ul style="list-style-type: none"> Eight (8) years actual service and/or recognisable experience after compliance with the appointment requirements for this Grade. Grade progression shall become effective from the 1st day of the month following the date on which the Education Psychologist met all the requirements. Grade progression shall be effective from 1 January 2011. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> Five (5) years actual service and/or recognisable experience after compliance with the appointment requirements in the grade, with at least four (4) annual assessment ratings of good performance. Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Psychologist met all the requirements.

CAREER STREAM: SCHOOL-BASED EDUCATION PSYCHOLOGIST				
Post	Salary levels and scales	Appointment requirements		Recognition of experience on appointment
		Registration	Experience	
Education Psychologist Grade 3	(Package) 535,995 544,035 552,195 560,475 568,881 577,413 586,077 594,870 603,792 612,849 622,041 631,371	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as Psychologist in a relevant registration category. Registration with the South African Council for Educators (SACE), where applicable). 	<ul style="list-style-type: none"> Minimum of sixteen (16) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified Psychologist who performed Community Service, as required in South Africa. Minimum of seventeen (17) years' relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified psychologists, of whom it is not required to perform Community Service, as required in South Africa. 	<p>Grade progression</p> <ul style="list-style-type: none"> Accelerated grade progression shall be effective from 1 January 2012.. <p>Accelerated pay progression</p> <ul style="list-style-type: none"> 2 notches per assessment cycle. Based on assessment of good performance. Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> Promotion to higher vacant advertised post

CAREER STREAM: OFFICE-BASED EDUCATION PSYCHOLOGIST				
Post	Salary levels and scales	Appointment requirements		Recognition of experience on appointment
		Registration	Experience	

CAREER STREAM: OFFICE-BASED EDUCATION PSYCHOLOGIST			
Post	Salary levels and	Appointment requirements	Grade progression
		Qualifications	Recognition of experience on
CAREER PATH			
2010			
Education Psychologist Grade 1	(Package) 392,079 397,962 403,932 409,992 416,142 422,382 428,718 435,147	<ul style="list-style-type: none"> Appropriate qualification that allows registration with the HPCSA as Psychologist in a relevant registration category. Registration with the Health Professions Council of South Africa (HPCSA) as Psychologist in a relevant registration category.. Registration with the South African Council for Educators (SACE), where applicable. 	<p>None</p>
		<ul style="list-style-type: none"> None after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified Psychologist who performed Community Service, as required in South Africa. One (1) year relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified psychologists, of whom it is not required to perform Community Service, as required in South Africa. 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements, as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service and/or recognizable experience after compliance with the appointment requirements for this Grade. Grade progression shall become effective from the 1st day of the month following the date on which the Education Psychologist met all the requirements. Grade progression shall be effective from 1 January 2011. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> Five (5) years actual service and/or recognisable experience

CAREER STREAM: OFFICE-BASED EDUCATION PSYCHOLOGIST					
Post	Salary levels and	Appointment requirements	Recognition of experience on	Grade progression	
Education Psychologist Grade 2	(Package) 461,547 468,777 475,806 482,943 490,191 497,544 505,005 512,583	<p>Appropriate qualification that allows registration with the HPCSA as Psychologist in a relevant registration category.</p> <ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as psychologist in a relevant registration category. Registration with the South African Council for Educators (SACE), where applicable. 	<p>None</p> <ul style="list-style-type: none"> Minimum of eight (8) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified psychologist who performed Community Service, as required in South Africa. Minimum of nine (9) years' relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified psychologists, of whom it is not required to perform 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements, as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service and/or recognizable experience after compliance with the appointment requirements for this Grade. Grade progression shall become effective from the 1st day of the month following the 	<p>after compliance with the appointment requirements in the grade, with at least four (4) annual assessment ratings of good performance.</p> <ul style="list-style-type: none"> Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Psychologist met all the requirements. Accelerated grade progression shall be effective from 1 January 2012.

CAREER STREAM: OFFICE-BASED EDUCATION PSYCHOLOGIST				
Post	Salary levels and	Appointment requirements		Grade progression
		Community Service, as required in South Africa.		<p>Psychologist met all the requirements.</p> <ul style="list-style-type: none"> Grade progression shall be effective from 1 January 2011. <p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> Five (5) years actual service and/or recognisable experience after compliance with the appointment requirements in the grade, with at least four (4) annual assessment ratings of good performance. Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Education Psychologist met all the requirements. Accelerated grade progression shall be effective from 1 January 2012..
Education Psychologist Grade 3	(Package) 535,995 544,035 552,195 560,475 568,881 577,413	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as Psychologist in a relevant registration category. 	<ul style="list-style-type: none"> Minimum of sixteen (16) years relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of RSA qualified Psychologist who perfor- 	<p>Accelerated pay progression</p> <ul style="list-style-type: none"> 2 notches per assessment cycle. Based on assessment of good performance. Limited to maximum of 20% per annum of the number of employees

CAREER STREAM: OFFICE-BASED EDUCATION PSYCHOLOGIST				
Post	Salary levels and	Appointment requirements		Grade progression
		Recognition of experience on		
	586,077 594,870 603,792 612,849 622,041 631,371	<ul style="list-style-type: none"> Registration with the South African Council for Educators (SACE), where applicable). 	<ul style="list-style-type: none"> Minimum of seventeen (17) years' relevant experience after registration with the Health Professions Council of South Africa (HPCSA) in respect of foreign qualified psychologists, of whom it is not required to perform Community Service, as required in South Africa. 	<p>on this Grade in the provincial department of education.</p> <p>Promotion</p> <ul style="list-style-type: none"> Promotion to higher vacant advertised post
Senior Education Psychologist Grade 1	(Package) 568,881 577,413 586,077 594,870 603,792 612,849 622,041 631,371	<ul style="list-style-type: none"> Registration with the Health Professions Council of South Africa (HPCSA) as Psychologist. Registration with the South African Council for Educators (SACE), where applicable. 	<ul style="list-style-type: none"> A minimum of 3 years' appropriate experience as Psychologist after registration with the Health Professions Council for South Africa (HPCSA) as Psychologist 	<p>Compliance with the educational qualifications, statutory requirements, prescribed training and competencies for the grade contained in the appointment requirements as well as the following experiential competency:</p> <p>Grade progression: Satisfactory performance:</p> <ul style="list-style-type: none"> Eight (8) years actual service on this Grade. Grade progression shall become effective from the 1st day of the month following the date on which the Senior Education Psychologist met all the requirements. Grade progression shall be effective from 1 January 2011.

CAREER STREAM: OFFICE-BASED EDUCATION PSYCHOLOGIST					
Post	Salary levels and	Appointment requirements		Recognition of experience on	Grade progression
Senior Education Psychologist Grade 2	(Package) 650,454 660,210 670,113 650,163 690,366 700,722 711,231 721,899 732,726 743,721	No direct appointment on this Grade	No direct appointment on this Grade	None	<p>Accelerated grade progression: Good Performance</p> <ul style="list-style-type: none"> ▪ Five (5) years actual service in the position of Senior Education Psychologist Grade 1, with at least four (4) annual assessment ratings of good performance. ▪ Accelerated grade progression shall become effective on the 1st day of the month following the date on which the Senior Education Psychologist met all the requirements. ▪ Accelerated grade progression shall be effective from 1 January 2012. <p>Accelerated pay progression</p> <ul style="list-style-type: none"> ▪ 2 notches per assessment cycle. ▪ Based on assessment of good performance. ▪ Limited to maximum of 20% per annum of the number of employees on this Grade in the provincial department of education. <p><u>Promotion</u></p> <ul style="list-style-type: none"> ▪ Promotion to higher vacant advertised post

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CAREER STREAM: OFFICE-BASED EDUCATION PSYCHOLOGIST				
Post	Salary levels and	Appointment requirements	Recognition of experience on	Grade progression

B.4 POSSIBLE CAREER PATH OPPORTUNITIES AND REQUIREMENTS FOR APPOINTMENT/UPGRADE/PROMOTION

	JOB TITLE		PROMOTION/ UPGRADING OF POST/APPOINTMENT	CAREER PATH/ STREAM	CRITERIA
	From	To			
B.4.1	School-based Educators				
B.4.1.1	School-based Educator: General Classroom Teacher				
	Teacher (Post level 1)	Senior Teacher (Post level 1)	By means of salary progression.	General Classroom Teacher	Compliance with the educational qualifications, statutory requirements, competencies and skills, experiential competency of the post or on the required salary notch (in the case of Senior and Master Teacher).
		Master Teacher (Post level 1)	By means of salary progression.	General Classroom Teacher	
		Departmental Head (Post level 2)	Apply for vacancy (promotion)	School-based Manager	
		Office-based post	Apply for vacancy (promotion)	Office-based Specialist	
	Senior Teacher (Post level 1)	Master Teacher (Post level 1)	By means of salary progression	General Classroom Teacher	Compliance with the educational qualifications, statutory requirements, competencies and skills, experiential competency of the post or on the required salary notch (in the case of a Master Teacher).
		Departmental Head (Post level 2)	Apply for vacancy (promotion)	School-based Manager	
		Office-based post	Apply for vacancy (promotion)	Office-based Specialist	
	Master Teacher (Post level 1)	Departmental Head (Post level 2)	Apply for vacancy (promotion)	School-based Manager	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post.
		Office-based post	Apply for vacancy (promotion)	Office-based Specialist	
B.4.1.2	School-based Educator: Manager				
	Departmental Head (Post level 2)	Deputy Principal (Post level 3)	Apply for vacancy (promotion)	School-based Manager	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post
		Principal (Post level 4) (P1 to P5)	Apply for vacancy (promotion)	School-based Manager	
		Senior Education Specialist (Post level 3)	Apply for vacancy (promotion)	Office-based Specialist	
		Office-based post on a higher post level	Apply for vacancy (promotion)	Office-based Specialist	

Deputy Principal (Post level 3)	Principal (Post level 4) (P1 to P5) Office-based promotion post	Apply for vacancy (promotion)	School-based Manager	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post
Principal 1 (Post level 4)	Principal P2 to P5 (Post level 4) Deputy Chief Education Specialist (Post level 5) Chief Education Specialist (Post level 6)	Apply for vacancy (promotion) Apply for vacancy (upgrade)	Office-based Specialist School-based Manager Office-based Specialist Office-based Specialist	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post
Principal 2-5 (Post level 4) <i>Note: A principal's post can also be upgraded in terms of ELRC Collective Agreement 5 of 2006.</i>	P3 to P5 (Post level 4) Deputy Chief Education Specialist (Post level 5) Chief Education Specialist (Post level 6)	Apply for vacancy (upgrade) Apply for vacancy (promotion) Apply for vacancy (promotion)	School-based Manager Office-based Specialist Office-based Specialist	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post

B.4.2	Office-based Educators			
B.4.2.1	Office-based Educator: Specialist			
	Education Specialist (post level 2)	Apply for vacancy (promotion)	Office-based Specialist	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post
	Senior Education Specialist (Post level 3)	Apply for vacancy (promotion)	Office-based Specialist	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post
	Deputy Chief Education Specialist (Post level 5)	Apply for vacancy (promotion)	Office-based Specialist	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post
	Deputy Chief Education Specialist (Post level 5) Chief Education Specialist (Post level 6)	Apply for vacancy (promotion) Apply for vacancy (promotion)	Office-based Specialist Office-based Specialist	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post
	Chief Education Specialist (Post level 6)	Apply for vacancy (promotion)	Office-based Specialist	Compliance with the educational qualifications, statutory requirements, competencies and skills and experiential competency of the post

- B.5 ADVERTISING AND FILLING OF EDUCATOR POSTS (*ELRC Resolution 5 of 1998*)
- B.5.1 General (school-based and office-based educator posts)
- B.5.1.1 In the making of any appointment or the filling of any post on any educator establishment due regard must be given to equality, equity and the other democratic values and principles which are contemplated in section 195(1) of the Constitution and which include the following factors, namely:
- B.5.1.1.1 The ability of the candidate.
- B.5.1.1.2 The need to redress the imbalances of the past in order to achieve broad representation. (*Section 7, EEA, 1998*)
- B.5.1.2 Any appointment or transfer to any post on the educator establishment of a public school may only be made on the recommendation of the SGB (unless the relevant SGB has not been established yet). (*Section 6(3)(a) and (m) of the EEA*)
- B.5.2 Advertising (school-based and office-based educator posts)**
- B.5.2.1 The advertisement of vacant posts for educators must:
- B.5.2.1.1 Be self-explanatory and clear and must include: -
- (a) Minimum requirements.
 - (b) Procedure to be followed for application.
 - (c) Names and telephone numbers of contact persons.
 - (d) Preferable date of appointment.
 - (e) Closing date for the receipt of applications.
- B.5.2.1.2 Be accessible to all who may qualify or are interested in applying for such post(s).
- B.5.2.1.3 Be non-discriminatory and in keeping with the provisions of the Constitution of the RSA.
- B.5.2.1.4 Clearly state that the State is an equal opportunity employer.
- B.5.2.2 All vacancies in public schools are to be advertised in a gazette, bulletin or circular, the existence of which must be made public by means of an advertisement in the public media both provincially and nationally. The information to be furnished in the latter advertisement must include offices and addresses where the gazette, bulletin or circular is obtainable. The gazette, bulletin or circular must be circulated to all educational institutions within the province.
- B.5.2.3 Office-based educator posts must be advertised both in the national and provincial media and by circular to all schools in the relevant province, ensuring that the provisions of paragraph B.5.2.1 above are met.
- B.5.3 Sifting (school-based and office-based educator posts)
- B.5.3.1 The employing department must acknowledge receipt of all applications by:

- B.5.3.1.1 Informing all applicants in writing of receipt.
- B.5.3.1.2 Clearly indicating whether the application is complete or not.
- B.5.3.1.3 Indicating whether the applicant meets the minimum requirements for the post and that such applications have been referred to the institutions concerned.
- B.5.3.2 The employing department must handle the process of eliminating applications of those candidates who do not comply with the requirements for the post(s) as stated in the advertisement.
- B.5.3.3 Trade union parties to the ELRC will be given a full report, at a formal meeting, on:-
 - B.5.3.3.1 Names of educators who have met the minimum requirements for post(s) in terms of the advertisement.
 - B.5.3.3.2 Names of educators who have not met the minimum requirements for the post/s in terms of the advertisement.
- B.5.3.4.2 Other relevant information that is reasonably incidental thereto.
- B.5.4 Short-listing and Interviews (school-based educator posts)**
 - B.5.4.1 Interview Committees must be established at educational institutions where vacancies are advertised.
 - B.5.4.2 The Interview Committee must comprise:
 - B.5.4.2.1 One departmental representative (who may be the school principal), as an observer and resource person.
 - B.5.4.2.2 The principal of the school (if he/she is not the departmental representative), except in the case where he/she is an applicant.
 - B.5.4.2.3 Members of the SGB, excluding educator members who are applicants to the advertised post/s.
 - B.5.4.3.4 One union representative per union that is a party to the provincial chamber of the ELRC. The union representatives will be observers to the shortlisting, interviews and the drawing up of a preference list.
 - B.5.4.3 Each Interview Committee must appoint from amongst its members a chairperson and a secretary.
 - B.5.4.4 All applications that meet the minimum requirements and provisions of the advertisement must be handed over to the SGB responsible for that specific institution.
 - B.5.4.5 The SGB is responsible for the convening of the Interview Committee and they must ensure that all relevant persons/trade unions are informed at least 5 working days

prior to the date, time and venue for the shortlisting, interviews and the drawing up of the preference list.

- B.5.4.6 Where the principal of the institution is an applicant, a departmental official may assist the SGB.
- B.5.4.7 In considering the applications, the Interview Committee must ensure that the principles of equity, redress and representivity are complied with and they must adhere to: (*Section 6(b) (i – v), EEA*)
- B.5.4.7.1 The democratic values and principles referred to in paragraph B.5.1.1.
- B.5.4.7.2 The procedures stipulated in paragraph B.5.
- B.5.4.7.3 The minimum requirements for appointment with regard to educational qualifications, statutory and experiential requirements stipulated in paragraph B.3.2.1.
- B.5.4.7.4 Procedures that would ensure that the recommendation is not obtained through undue influence on the members of the SGB.
- B.5.4.8 The Interview Committee must also consider:
- B.5.4.8.1 The curricular needs of the institution.
- B.5.4.8.2 The obligations of the employer towards serving educators.
- B.5.4.9 The list of short-listed candidates for interview purposes should not exceed five per post. An educator, who has been acting in the advertised post for 12 months or more and has applied for the post, must be shortlisted.
- B.5.4.10 The interviews will be conducted according to agreed-upon guidelines and procedures. These are to be jointly agreed upon by the parties to the provincial chamber.
- B.5.4.11 All interviewees must receive similar treatment during the interviews.
- B.5.4.12 At the conclusion of the interviews the Interview Committee must rank the candidates in order of preference, together with a brief motivation, and submit this to the SGB for their recommendation to the relevant employing department.
- B.5.4.13 The SGB must, after having ensured that the principles and processes stipulated in paragraph B.5.4 have been adhered to, submit in order of preference to the HoD, a list of -
- B.5.4.13.1 At least three names of recommended candidates; or
- B.5.4.13. Fewer than three candidates in consultation with the HoD. (*Section 6(c), EEA, 1998*)

B.5.5 Appointment (school-based educator posts)

- B.5.5.1 When the HoD considers the recommendation contemplated in paragraph B.5.4.13, he/she must, before making the appointment, ensure that the SGB has met the requirements in paragraph B.5.4.7.
- B.5.5.2 If the SGB has not met the requirements in paragraph B.5.4.13 the HoD must decline the recommendation.
- B.5.5.3 Despite the order of preference (paragraph B.5.4.13) and subject to paragraph B.5.5.1, the HoD may appoint any suitable candidate on the list. If the HoD declines a recommendation, he/she must –
- B.5.5.3.1 Consider all the applications submitted for the post.
- B.5.5.3.2 Apply the requirements in paragraph B.5.4.7, appoint a suitable candidate temporarily or re-advertise the post.
- B.5.5.4 The SGB may appeal to the MEC against the decision of the HoD regarding the temporary appointment.
- B.5.5.4.1 The appeal must be lodged within 14 days of receiving the notice of appointment.
- B.5.5.4.2 The appeal must be finalized by the MEC within 30 days.
- B.5.5.4.3 If no appeal is lodged within 14 days, the HoD may convert the temporary appointment into a permanent appointment as contemplated in paragraph B3.1.8. (*Section 6(d – k), EEA*)
- B.5.5.4.3 The employer will inform all unsuccessful candidates in writing within eight weeks of an appointment being made.
- B.5.6 Short-listing and Interviews (office-based educator posts)**
- B.5.6.1 The DG/HoD will establish Interview Committees for shortlisting and interviews in respect of educator posts.
- B.5.6.2 The Chairperson must be at least one post level higher and members of the Committee should be on an equivalent of higher post level/ranking than the post for which the shortlisting is done and interviews conducted.
- B.5.6.3 One union representative per trade union that is a party to the ELRC must be invited to act as observer. The union representatives will be observers to the shortlisting, interviews and the drawing up of a preference list.
- B.5.6.4 All applications that meet the minimum requirements and provisions of the advertisement must be handed to the responsible Interview Committee.
- B.5.6.5 The employing department is responsible for convening the Interview Committee and must ensure that all relevant persons/trade unions are informed at least 5 working days prior to the date, time and venue for the shortlisting, interviews and the drawing up of the preference list.

- B.5.6.6 In considering the applications, the Interview Committee must ensure that the principles of equity, redress and representivity are complied with and they must adhere to:
- B.5.6.6.1 The democratic values and principles referred to in paragraph B.5.1.1.
- B.5.6.6.2 The applicable procedures stipulated in paragraph B.5.
- B.5.6.6.3 The minimum requirements for appointment with regard to educational qualifications, statutory and experiential requirements stipulated in paragraph B.3.2.1.
- B.5.6.6.4 Agreed upon procedures that would ensure that the recommendation is not obtained through undue influence on the members of the Interview Committee.
- B.5.6.7 The list of short-listed candidates for interview purposes should not exceed five per post. An educator who has been acting in the advertised post for 12 months or more and has applied for the post, must be shortlisted.
- B.5.6.8 The interviews will be conducted according to agreed-upon guidelines.
- B.5.6.9 All interviewees must receive similar treatment during the interviews.
- B.5.6.10 At the conclusion of the interviews the Interview Committee must rank the candidates in order of preference, together with a brief motivation, and submit this to the relevant line functionary. The line functionary must ensure that the Interview Committee has met the requirements set out in paragraph B.5.
- B.5.6.11 If provisions and procedures were not adhered to, the recommendation must be referred back to the Interview Committee for rectification before submission to the DG/HoD.

B.5.7 Appointment (office-based educator posts)

- B.5.7.1 The DG/HoD must consider the recommendation for approval.
- B.5.7.2 The employer will inform all unsuccessful candidates in writing within eight weeks of an appointment being made.

B.5.8 Records

The employer must ensure that accurate records are kept of proceedings dealing with the interviews, decisions and motivations relating to the preference list submitted by school governing bodies and other such structures.

B.6 TRANSFER OF SERVING EDUCATORS IN TERMS OF OPERATIONAL REQUIREMENTS

- B.6.1 Operational requirements for education institutions are based on, but not limited to the following:
- B.6.1.1 Change in learner enrolment.

- B.6.1.2 Curriculum changes or a change in learners' involvement in the curriculum.
- B.6.1.3 Change to the grading or classification of an institution.
- B.6.1.4 Merging or closing of institutions.
- B.6.1.5 Financial constraints.
- B.6.2 Subject to regulations on post provisioning, a Head of a Provincial Department of Education must, from time to time, inform each institution of its new educator post establishment. As a result of operational requirements the new staff establishment may provide for fewer posts than the existing staff establishment or the skills requirements of the new establishment may not match the skills profile of the incumbent educators. As a result, some serving educators may be in addition to the new establishment.
- B.6.3 Each principal must inform his/her staff of the institution's new educator post establishment and of the procedure, as set out in the next paragraph, that will be followed in identifying educators who cannot be accommodated on the new establishment. This information must be accessible to all members of staff.
- B.6.4 The procedure for the identification of serving educators in addition to the establishment as a result of operational requirements need not be performed on an annual basis, but must be performed at least once every 36 months, and shall be:
- B.6.4.1 The Principal, after consulting with the educator staff of the institution at a formal staff meeting, may recommend that educators who may be declared in addition, be absorbed in vacancies that exist or will exist in the near future (not longer than six months) at that education institution.
- Vacancies that will exist in the near future refers to vacancies as a result of educators, at the particular institution, leaving as a result of retirement, boarding, resignation, promotion and employer initiated discharges, where the date of exit is known.
- B.6.4.2 After considering B.6.4.1 above, the Circuit/District Manager together with the Principal shall identify the educators in addition, taking into account the following:
- B.6.4.2.1 The views of the educator staff of the institution as expressed at a formal meeting convened by the principal;
- B.6.4.2.2 The needs of the institution, more particularly in relation to its specific curriculum obligations, the number of classes, the timetable and the allocation of learners to classes;
- B.6.4.2.3 The Circuit/District Manager shall take cognizance of the fact that there is not necessarily a direct relation between the posts identified as in addition and an educator who will be declared in addition, as there may be more than one post with substantially the same duties attached to it;
- B.6.4.2.4 If a decision has to be taken regarding two or more educators competing for the same post, the principle of "last in, first out" (LIFO) shall be applied. An educator's

service period for the application of LIFO shall include all continuous service rendered at any public education institution.

- B.6.4.2.5 One representative per trade union party to the ELRC shall be invited by the District/Circuit Manager to observe the process.
- B.6.4.3 An educator who has been identified as in additional shall be so informed, in writing, by the Provincial Education Department concerned.
- B.6.5 The following procedure shall be followed in filling vacancies in cases where a department has educators in addition of a staff establishment:
- B.6.5.1 In terms of section 6 and/or section 8 of the Employment of Educators Act, (1998) the employer may transfer an educator who is in addition to another post in the department that matches his/her skills and experience.
- B.6.5.2 In terms of section 6(3) and/or section 8(2) of the Employment of Educators Act, the employer may only transfer an educator permanently to a school on the recommendation of the governing body of such school.
- B.6.5.3 The employer shall provide a list of vacancies and their profiles from which the educator additional to the post establishment would, as per the agreed management plan of the respective provincial department, make a choice relevant to his/her profile for transfer.
- B.6.5.4 In the event the educator fails to make a choice, the employer reserves the right to make a choice on behalf of such educator.
- B.6.5.5 The employer shall, after receiving the choices of the educators, submit such to the relevant school governing body for consideration and recommendation within 2 months of the request.
- B.6.5.6 The HoD may, in terms of section 8(5) of the Act, temporarily transfer an educator declared additional to the staff establishment without a recommendation of the school governing body for a stated period.
- B.6.5.7 In the event none of the educator's choices in terms of paragraph B.6.5.3 can be realised, the employer must first give the educator an opportunity to make written representations e.g. personal circumstances about the intended transfer to that specific school within 5 working days before a final decision is made.
- B.6.5.8 The opportunity to make representations must be given to the educator before a school governing body recommends the transfer of such educator to their school.
- B.6.5.9 Having made the final decision to transfer an educator to a specific school, the employer must give the educator reasonable notice of the date on which he or she must report for duty at the new place of work. Thirty school days will be considered reasonable notice for purposes of this clause.
- B.6.6 Notwithstanding the provisions contained above in sub-sections B.6.1 to B.6.4 and subject to the post provisioning model, educators declared additional to the staff establishment may be retained in their original schools.

- B.6.7 Notwithstanding paragraph B.6.4, staff establishments for schools, in line with the post provisioning model, will be issued annually by the Head of a Provincial Education Department.
- B.6.8 The time period of 36 months referred to in paragraph B.6.4, will not negatively affect the creation and/or filling of posts, the grading of schools or any other personnel related matter, in terms of relevant and applicable provisions, during that period.
- B.6.9 The Role of the Arbitrator in Respect to the Process Above:
- B.6.9.1 During any ELRC arbitration proceedings about the enforcement, interpretation or application of the measures outlined above, an arbitrator appointed by the ELRC shall have jurisdiction to set aside the decision of the employer to transfer an educator to a specific school and refer the decision back to the employer for a fresh decision if:
- B.6.9.1.1 The educator has not been given an opportunity to make representations about the specific school to which the employer intends to transfer the educator; or
- B.6.9.1.2 The educator has not been given reasonable notice of the date on which he/she must report for duty at a school to which he/she has been transferred; or
- B.6.9.1.3 The employer has failed to apply his/her mind to the representation e.g. personal circumstances that the educator has brought to the attention of the employer, or has otherwise acted irrationally in this regard. In determining whether the employer has acted irrationally in this regard the arbitrator shall amongst others consider the following:
- B.6.9.1.3.1 the fact that the operational requirements of the employer remain the ultimate and overriding factor to be considered when deciding on a transfer;
- B.6.9.1.3.2 the best interests of learners in the province;
- B.6.9.1.3.3 the extent of the remoteness of the school to which the educator has been transferred;
- B.6.9.1.3.4 the educator's situation of childcare or care for family members;
- B.6.9.1.3.5 the availability of any alternative means to care for a child or a family member left behind as a result of the transfer;
- B.6.9.1.3.6 the fact that an educator who has been declared in addition must be transferred to another place of work;
- B.6.9.2 An ELRC arbitrator who arbitrates a dispute about the interpretation, application or enforcement of the measures outlined above shall:
- B.6.9.2.1 not have any jurisdiction to determine where an educator shall be transferred to as this falls within the prerogative of the employer; and
- B.6.9.2.2 not have jurisdiction to award compensation

B.7 POSITION OF A PRINCIPAL IN A CASE WHERE A SCHOOL IS REGRADED (UPGRADED OR DOWNGRADED) (*Government Gazette No. 22594, dated 24 August 2001*)

B.7.1 When a school is regraded, the post of the principal is regarded as a new and, therefore, vacant post. Such a post must, subject to these measures, be filled in terms of paragraph B.5 without undue delay.

B.7.2 If the permanent incumbent of a principal post that has been upgraded, qualifies to be upgraded to the new level and the SGB recommends in writing that the person may be upgraded to the higher level, such appointment may be made without having to advertise the post. If the SGB does not make such a recommendation, the post must be advertised in which case the incumbent will be entitled to apply for the upgraded post and he/she must be short-listed.

B.7.3 If such a principal's application for appointment to the upgraded post is unsuccessful, he/she will be regarded as in addition to the establishment as a result of operational requirements and must be dealt with in terms of paragraph B.6.

B.7.4 A principal whose post has been downgraded, will retain his/her salary position against the downgraded post for a reasonable period up to a maximum of 2 years. Such a principal will continue to receive any form of salary progression applicable at that stage on condition that he/she continues to perform the functions of a principal at a satisfactory level. If circumstances warrant it, the HoD may extend this period. Circumstances that will determine what a reasonable period is include the probability for the post to be upgraded to its original level in the near future, the personal circumstances of the incumbent and the availability of suitable posts to which the person can be transferred. The person so in addition to the staff establishment may at any time, while occupying the downgraded post, exercise the option to be permanently appointed to the post concerned in which case his/her remuneration will be determined in terms of paragraph B.8.7. In such a case the post does not need to be advertised if it is in accordance with a recommendation of the SGB.

B.8 SALARIES APPLICABLE TO EDUCATOR POSTS

B.8.1 Post and Salary Structure for the Period 1 July 1996 to 31 March 2003 (*ELRC Resolution 3 of 1996*)

Refer to Annexure B.2 for the implementation of the broad band salary system and to Annexure B.4 for the salary adjustments for the period 1 July 1996 to 1 July 2002.

B.8.2 Post and Salary Structure for the Period 1 April 2003 to 31 December 2007 (*ELRC Collective Agreement 4 of 2003*)

Refer to Annexure B.3 for the translation tables and B.4 for the salary adjustments for the period 1 July 2003 to 1 July 2007.

B.8.3 OSD Salary Structure (*ELRC Collective Agreement 1 of 2008*)

B.8.3.1 The OSD salary structure consists of a **key scale** (single scale) with 221 **notches**. The difference between each notch is 1%, except for notch codes 26/27, 77/78, 117/118 and

154/155 where the difference is less than 1% due to the implementation of the 2009 inflation related salary increase based on a sliding scale.

The OSD salary structure was implemented on 1 January 2008.

Refer to Annexure B.4 for the OSD translation tables (1 January 2008), Annexure B.5 for the OSD key salary scale and annual salary adjustments and Annexure B.6 for the annual inclusive remuneration package adjustments.

B.8.3.2 Each post has a **salary range** that applies. A salary range refers to the minimum and maximum notches applicable to a particular post.

B.8.3.3 Salary ranges (minimum and maximum notches) applicable to educator posts

	Job title	Salary range	
		Minimum notch code	Maximum notch code
B.8.3.3.1	School-based Educator: General Classroom Teacher		
	Teacher (REQV 10, 11 and 12)	4	55 Note: REQV 10, 11 and 12 educators who qualified in terms of ELRC Collective Agreement 4 of 2009 were able to progress beyond notch 56 and were considered to be REQV 13 educators for salary purposes only. Refer to paragraph B.9.3.
	Teacher (REQV 13)	56	138
	Teacher (REQV 14 ⁺)	85	168
	Senior Teacher (REQV 13)	103	138
	Master Teacher (REQV 13)	120	138
	Senior Teacher (REQV 14 ⁺)	103	168
	Master Teacher (REQV 14 ⁺)	120	168
	School-based Educator: Manager		
	Departmental Head	108	201
	Deputy Principal	126	209

		Salary range	
	P1 Principal	108	186
	P2 Principal	126	201
	P3 Principal	144	215
	P4 Principal	159	218
	P5 Principal	180	221
B.8.3.3.2 Office-based Educator: Specialist			
	Education Specialist	108	201
	Senior Education Specialist	126	209
	Deputy Chief Education Specialist (non-inclusive remuneration package)	147	160
	Deputy Chief Education Specialist (inclusive remuneration package)	1	55
	Chief Education Specialist (inclusive remuneration package)	17	61

Note: Deputy Chief Education Specialists who are at notch code 160 and are eligible for salary progression to notch code 161 must translate to notch code 1 of the inclusive remuneration package.

B.8.4 Determination of Salaries of Educators

B.8.4.1 General principles

B.8.4.1.1 An educator is always appointed to the lowest salary notch of the salary range applicable to his/her qualifications (REQV) and the post to which he/she is appointed.

B.8.4.1.2 Subject to provisions to the contrary, no educator may be appointed or progress to a salary notch that is outside the salary range that applies to the post and the qualifications of the educator concerned.

B.8.4.2 Starting salary of post level 1 educators (ELRC Collective Agreement 1 of 2008)

B.8.4.2.1 The starting salary of a post level 1 educator with REQV 14, 15, 16 or 17 and who has no experience (neither in nor outside public education) is notch code 85.

B.8.4.2.2 The starting salary of a post level 1 educator with REQV 13 and who has no experience (neither in nor outside public education) is notch code 56.

B.8.4.2.3 The starting salary of a post level 1 educator with REQV 10, 11 or 12 and who has no experience (neither in nor outside public education) is notch code 4.

B.8.4.2.4 After having completed a 24-month employment period, an eligible first year educator will qualify for pay progression annually (*PSCBC Resolution 1 of 2012*).

B.8.4.3 Salary of an educator who has actual teaching or appropriate experience outside public education (ELRC Collective Agreements 5 of 2003 and 4 of 2003)

Note: Actual teaching experience outside public education includes, inter alia, experience gained in an independent school, as a SGB or college council employee, AET educator or teaching experience abroad.

Note: Appropriate experience refers to working experience, which in the opinion of the employer, developed the person directly or appositely in all respects regarding knowledge, skills and attitude, for holding an educator post.

Note: Paragraph B.8.4.3 does not refer to the determination of salaries of educators who have been employed by the state and are re-appointed after a break in service. Refer to paragraph B.8.5 in this regard.

B.8.4.3.1 Actual teaching or appropriate experience is recognised as follows:

(a) For purposes of determining the starting salary of an educator with experience outside public education, additional notches may be granted based on actual teaching and/or appropriate experience.

(b) Experience gained before 1 July 1996 (ELRC Collective Agreement 5 of 2003)

(i) The same recognition for experience gained outside public education must be given to educators appointed for the first time in public education after 1996, as for educators who were in public education at any period before 1 July 1996.

(ii) The salary position that would have been applicable to the person on 30 June 1996 as a result of the experience that he/she gained before 1 July 1996, in terms of the measures that applied at that stage, must be determined.

(iii) The salary scale that was applicable to educators in Category D (M0) will apply to an educator with a qualification of REQV 14 and higher.

(iv) The salary scales that applied on 30 June 1996 are as follows:

Post level 1

Qualification Category	Qualification Equivalent	Salary Scale
A2	REQV 10	20118 (Fixed)
A1 (M0)	REQV 11	20118 x 1854-27534 x 2271-29805
B (M0)	REQV 12	21972 x 1854-27534 x 2271-38889
C (M0)	REQV 13	29805 x 2271-38889 x 2709-49725
D (M0)	REQV 14+	34347 x 2271-38889 x 2709-49725 x 2964-55653

Post level 2

Qualification Category	Qualification Equivalent	Salary Scale
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A2	REQV 10	23826 (Fixed)
A1	REQV 11	29805 x 2271-36618
B	REQV 12	36618 x 2271-38889 x 2709-47016
C	REQV 13	49725 x 2964-61581 x 3318-64899
D	REQV 14+	55653 x 2964-61581 x 3318-71535

Post level 3

Qualification Category	Qualification Equivalent	Salary Scale
A2	REQV 10	27534 (Fixed)
A1	REQV 11	34347 x 2271-38889 x 2709-41598
B	REQV 12	41598 x 2709-49725 x 2964-52689
C	REQV 13	55653 x 2964-61581 x 3318-78171 x 3444-81615
D	REQV 14+	61581 x 3318-78171 x 3444-88503

Post level 4

Qualification Category	Qualification Equivalent	Salary Scale
A2	REQV 10	32076 (Fixed)
A1	REQV 11	38889 x 2709-47016
B	REQV 12	47016 x 2709-49725 x 2964-58617
C	REQV 13	61581 x 3318-78171 x 3444-88503
D	REQV 14+	68217 x 3318-78171 x 3444-95391

(v) All further adjustments, as well as translations, that took place on 1 July 1996, 1 April 2003 and 1 January 2008 must be effected in order to determine the applicable notch to which the person must be appointed (refer to paragraph 8.4.3.1(a) and (e) below).

(c) **Experience gained between 1 July 1996 and 31 March 2003** (*ELRC Resolution 3 of 1996*)

No experience is recognized.

(d) **Experience gained between 1 April 2003 and 31 December 2007** (*ELRC Collective Agreement 4 of 2003*)

For every twelve months of actual teaching or appropriate experience that an educator has gained, he/she will be granted one additional notch on the applicable salary level. Additional notches will only be granted up to the maximum of the applicable salary level.

(e) **Experience gained after 1 January 2008**

For every twelve months of actual teaching or appropriate experience that an educator has gained, he/she will be granted one additional notch (at least 1%) on the applicable salary range. Additional notches will only be granted up to the maximum of the applicable salary range.

Note: The provisions of ELRC Collective Agreement 4 of 2009 are not applied when a salary is determined.

Example:

Teacher A (post level 1 and REQV 14) has experience as SGB employee for the period 1 January 1990 to 30 June 2007. She is appointed to a departmental post on 1 January 2010.

Determination of salary:

Step 1: Apply the provisions of paragraph B.8.4.3.1 (b) (*ELRC Collective Agreement 5 of 2003*) for the period 1 January 1990 to 30 June 1996.

- 6 completed years' experience translates to R47016 (as on 30 June 1996).
- R47016 translates to notch 7.2 (R53487) (*ELRC Resolution 3 of 1996*) (Refer to Annexure B.3).

Step 2: No recognition for period 1 July 1996 to 31 March 2003.

Step 3: Apply the provisions of paragraph B.8.4.3.1 (d) (*ELRC Collective Agreement 4 of 2003*) for the period 1 April 2003 to 30 June 2007:

- Translate broad band notch 7.2 to notch 7.6 (*ELRC Collective Agreement 4 of 2003*)
- Add 4 additional notches for 4 complete years of experience (4 X 12 months) = notch 7.10

Step 4: Translate notch 7.10 to OSD salary scale (*ELRC Collective Agreement 1 of 2008*) = notch code 92 = R151611 (2009 salary scale).

8.4.4 Transfer of employee from a public service (PS) post to an educator post

8.4.4.1 An employee that occupies a public service post and is appointed to an equivalent educator post without a break in service, will retain his/her salary. The salary must be translated to the nearest higher notch on the applicable salary range.

8.4.4.2 The salary of an employee that occupies a public service post and is promoted/appointed to a post on a higher level, will be determined in terms of the provisions set out in paragraph B.8.6.

B.8.5 Salary Applicable to an Educator who is Re-Appointed After a Break in Service**B.8.5.1 General measures**

B.8.5.1.1 The applicable salary position to which an educator should be appointed after a break in service is always determined in terms of the salary position which he/she occupied before the break in service. This includes a situation where the person occupied a non-educator post in the public service before the break in service.

- (a) An equivalent salary position of a person who left the service before 1 July 1996 is determined by adjusting his/her last applicable salary in accordance with all the subsequent adjustment measures, including the measures applicable to salary adjustments on 1 July 1996, 1 April 2003 and 1 January 2008.
- (b) In order to compare the post level to which a person is re-appointed after 1 July 1996 with the post level he/she occupied before a break in service before 1 July

1996, the level of the new post must be compared with the equivalent post level of the previous post.

B.8.5.1.2 Educators may only be re-appointed to salary notches within the applicable salary range.

B.8.5.2 Educators who are reappointed after a break in service

B.8.5.2.1 An educator who is appointed after a break in service shall always be appointed to the entry level salary notch code of the salary band of the post to which he/she has been appointed under the following conditions:

- (a) Should an educator resign or retire and comes back in service on the same level and has more than 6 years of uninterrupted service on that particular post level, such an educator shall be awarded additional 6 notches to the minimum (entry) notch of the post which he/she is appointed.
- (b) Should an educator resign or retire and comes back in service on the lower post level and has more than 6 years of uninterrupted service on any post level, such an educator shall be awarded additional 6 notches to the minimum (entry) notch of the post which he/she is appointed.
- (c) Should an educator resign or retire and comes back in service on the same level and has less than 6 years of uninterrupted service on that particular post level, such an educator shall be appointed to the minimum (entry) notch of the applicable post.
- (d) Should an educator resign or retire and comes back in service on the lower level and has less than 6 years of uninterrupted service on that particular post level, such an educator shall be appointed to the minimum (entry) notch of the applicable post.

B.8.5.2.2 Recognition of actual experience for promotion purposes:

- (a) The educator's years of actual experience will still be considered for promotion purposes. E.G. If a deputy principal applies for a promotion post of deputy principal again after a break in service, his/her actual years of service will still be recognised for promotion purposes.

B.8.5.2.3 Appropriate experience obtained outside public education for determination of salary:

- (a) The provisions as outlined in Chapter B.8.4.3.1 relating to the above-mentioned in the determination of salary will not apply to educators who have resigned or retired and reappointed.

B.8.5.3 Re-appointment to a higher post level after a break in service

B.8.5.3.1 An educator who is re-appointed to a higher post level than the one he/she occupied before the break in service, is appointed to the lowest salary notch of the applicable salary range

which is higher than the salary position (or equivalent salary position) occupied by the educator before the break in service, provided that he/she at all times gains at least 6 notches (6%), irrespective of whether the previous notch code falls below or within the higher salary range.

If the educator has improved his/her REQV during the break in service which has the effect that a new salary range becomes applicable, the appointment must be to the minimum of the new salary range or the same salary position occupied before, whichever is more beneficial to the educator. If such educator who has improved his/her REQV during his/her break in service is appointed to the same salary position occupied before the break in service, he/she will be entitled to a cash bonus. Refer to paragraph B.10.

Example:

A former post level 2 educator was on notch code 124 when he/she resigned. After the break in service he/she is re-appointed to a post level 3 post (minimum notch = 126). The educator must be re-appointed to notch code 130.

- B.8.5.3.2 An educator, who is re-appointed to a graded post (principal post) with a higher grade than the post he/she occupied before the break in service, is appointed to the lowest applicable salary notch which is higher than the salary position (or equivalent salary position) occupied by the educator before the break in service, provided that he/she at all times gains at least 6 notches (6%), irrespective of whether the previous notch code falls below or within the higher salary range.

B.8.6 Salary Applicable to a Serving Educator who is Promoted or Appointed to a Graded Principal Post, which is on a Higher Grade than the Post he/she Occupied

- B.8.6.1 The salary of an educator who is promoted must be adjusted to the minimum notch of the salary range applicable to the higher post level, provided that the educator's salary is at all times increased by at least 6%, irrespective of whether the current notch code falls below or within the higher salary range.

- B.8.6.2 The salary of an educator who is appointed to a graded principal post, with a higher grade than his/her current post, must be adjusted to the minimum notch of the salary range applicable to the higher grade post, provided that the educator's salary is increased at all times by at least 6%, irrespective of whether the current notch code falls below or within the higher salary range.

Example:

A post level 1 educator on notch code 90 is promoted to a post level 2 post. The minimum notch code applicable to post level 2 is notch code 108. The educator is appointed to notch code 108.

Example:

A post level 1 educator on notch code 106 is promoted to a post level 2 post. As the educator's salary has to be increased by at least 6%, he/she is appointed to notch code 112.

Example:

A P3 Principal (post level 4) on notch code 190 applies for a P5 post (post level 4). The minimum notch code for a P5 post is 180. The principal should either move to the minimum notch or gain at least 6%. As he/she is already on a notch higher than the minimum of 180, he/she must be appointed to notch code 196.

- B.8.6.3 If an educator is appointed to a higher post level/ principal post with higher grade on the same date that he/she would have been eligible for progression, the progression will first be implemented after which his/her salary will be adjusted in terms of paragraph B.8.6.
- B.8.6.4 Promotion rule for the period 1 April 2003 to 31 March 2008: The salary of an educator who is promoted must be adjusted to the minimum notch of the salary range applicable to the higher post level, provided that the educator's salary is increased by at least 3% for each post level that the new post level is higher than his/her current post, irrespective of whether the current notch code falls within the higher salary range. (*ELRC Collective Agreement 4 of 2003*)
- B.8.6.5 Promotion rule for the period 1 July 1996 to 31 March 2003: The salary of an educator who is promoted must be adjusted to the minimum notch of the salary range applicable to the higher post level, provided that the educator will advance at least one salary position for each post level that the new post level is higher than his/her current post, irrespective of whether the current notch code falls within the higher salary range. (*Government Gazette No. 17226, dated 31 May 1996*)
- B.8.7 Salary applicable to an educator who is voluntary appointment to a lower post level/demotion/whose appointment is considered to be a downgrade from his/her current post (voluntary)**

The same provisions as in paragraph B.8.5.3 apply.

B.9 SALARY ADJUSTMENTS

B.9.1 Salary Progression

B.9.1.1 Salary progression as from 1 July 2010 (*ELRC Collective Agreement 4 of 2009*)

- B.9.1.1.1 One notch progression (at least 1%) on 1 July of each year.
- B.9.1.1.2 As the difference between notch codes 26/27, 77/78, 117/118 and 154/155 is less than 1%, qualifying educators on these notch codes must progress as follows:

notch code 26 progress to notch code 28
 notch code 77 progress to notch code 79
 notch code 117 progress to notch code 119
 notch code 154 progress to notch code 156.

B.9.1.2 Salary progression: 1 July 2009

Educators who were in service before 1 July 2009 for a period of at least 12 consecutive months received a once-off 3% salary progression as per ELRC Collective Agreement 4 of 2009.

B.9.1.3 1 July 2008: no salary progression

B.9.1.4 Salary progression, grade progression or accelerated salary progression: 1 July 2005, July 2006 and July 2007

As per ELRC Collective Agreement 5 of 2006, backdated to 1 July 2005.

B.9.1.5 Salary progression, grade progression and backlogs: 1 July 2004

As per ELRC Collective Agreements 4 of 2003 and 2 of 2005.

B.9.1.6 Salary progression: 1 July 2003

As per ELRC Collective Agreement 4 of 2003.

B.9.1.7 Salary progression: 1 July 1996 – 30 June 2003

No progression.

B.9.2 Once-Off Recognition of Experience (RoE) (ELRC Collective Agreement 4 of 2009)

On 1 July 2009 experience as a serving educator was recognised: For every three years' of continuous experience as an educator employed by the state, one additional notch was awarded. The new salary notch was calculated based on the educator's salary position as on 30 June 2009.

B.9.3 Salary Adjustment for REQV 10, 11 and 12 Educators (ELRC Collective Agreement 4 of 2009)

B.9.3.1 On 1 July 2009 all educators on REQV 10 to 12 who had been appointed permanently in line with ELRC Collective Agreement 4 of 2001 and who were below salary notch code 56 after the application of RoE and 3% salary progression, were moved to REQV 13 for salary purposes.

B.9.3.2 REQV 10 to 12 educators who were beyond notch code 56 were eligible for RoE and 3% salary progression on 1 July 2009.

B.9.4 Once-Off Cash Amount for Senior and Master Teachers (ELRC Collective Agreement 4 of 2009)

On 1 July 2009 a once-off cash amount equal to 3% of their annual salary was paid to post level 1 educators who, on 30 June 2009, were on salary notch codes 97 and 119. These educators would have qualified on 1 July 2008 to become Senior or Master Teachers in line with ELRC Collective Agreement 5 of 2006, had ELRC Collective Agreement 1 of 2008 not been implemented.

B.10 RECOGNITION FOR IMPROVEMENT IN REQV

B.10.1 General Measures:

- B.10.1.1 An educator who qualifies for a salary adjustment, must submit proof of such a qualification to his/her employer within 12 months of obtaining it in order to receive the salary adjustment with effect from the date on which it was obtained. Should an educator fail to submit the qualification within 12 months, he/she will only qualify for such salary adjustment with effect from the date on which the qualification was submitted. (*Government Gazette No 24948, dated 21 February 2003*)
- B.10.1.2 Qualifications will be recognized as from the date on which the educator meets all the requirements for obtaining the qualifications concerned, according to the written statement by the examining body concerned. In the absence of such a statement, a qualification will be recognized as from the date the certificate was issued.
- B.10.1.3 Recognition of an improvement of an educator's REQV can either be an adjustment to a higher salary notch or the payment of a once off cash bonus.
- B.10.1.4 Cash awards payable to educators in terms of these measures, are calculated in all cases as 10% of notch code 85. In respect of an educator who improves his/her qualifications while in service, the value of this salary notch as on the date on which the qualification was obtained, will apply. In respect of educators who enter the service and who qualify for a cash bonus due to a qualification that is higher than REQV 13, the value of this salary notch, as on the date on which the person qualifies for the cash award, will apply.
- B.10.1.4 The payment of such cash amounts came into effect on 1 July 1996, and may not be granted to an educator more than once for the same REQV improvement.

Note: The 12-month limitation referred to in paragraph B.10.1.1 is not applicable when an educator qualifies for a cash bonus.

B.10.2 Recognition for improvement in REQV**B.10.2.1 Educators on REQV 10, 11 or 12**

If a serving educator with REQV 10, 11 or 12 improves his/her education qualifications, which has the effect that his/her REQV improves to REQV 13, the educator's salary will adjust to notch code 56. If already on notch code 56 or beyond, he/she will receive a cash bonus equal to 10% of notch code 85.

B.10.2.4 Educators with REQV 13

If a serving educator with REQV 13 (or lower) on post level 1 or a principal receiving an allowance for performing the duties of principal improves his/her education qualifications, which has the effect that his/her REQV improves to REQV 14, such an educator's salary will adjust to notch code 85. If the educator is already on notch code 85 or beyond, he/she will receive a cash bonus equal to 10% of notch code 85.

- B.10.2.5 Educators on post level 1 with REQV 14 or higher and educators on post levels 2 to 5 with REQV 13 or higher

If a serving educator on post level 1 with REQV 14 or higher or an educator on post levels 2 to 5 with REQV 13 or higher improves his/her REQV such educators will receive a cash bonus equal to 10% of notch code 85.

B.10.3 Recognition of Qualifications that are Higher than the Minimum Required for Appointment to a Specific Post

B.10.3.1 First appointment

An educator with a REQV of 15, 16, or 17, who is appointed (first appointment) from outside education to post level 1 or an educator with a REQV of 14 to 17 who is appointed (first appointment) from outside education to post level 2 to 5, receives, after he/she has completed a period of one year of continuous service, a cash bonus, equal to 10% of notch code 85, for each REQV higher than 14 or 13 respectively.

B.10.3.2 Improvement of qualifications during a break in service

An educator who is re-appointed after a break in service and who improved his/her REQV during the break in service is appointed to the salary range that is applicable to the relevant post and the improved REQV. If such a re-appointment is to the same salary notch than what it would have been without the improved REQV, the educator will qualify for a cash bonus equal to 10% of notch code 85 after he/she has completed a period of one year of continuous service.

B.11 DATES ON WHICH SALARIES OF EDUCATORS EMPLOYED AT AN INSTITUTION COMMENCE AND TERMINATE (*Regulation 6 of the Regulations regarding the terms and conditions of employment of educators*)

B.11.1 An educator employed at an institution who is appointed during any term and who renders service for a continuous period of at least 30 days during such term will be paid a salary:

B.11.1.1 If such service begins on the first working day of the term, from the first day of the month in which he/she assumes duty and up to and including the last day he/she is so in service; or

B.11.1.2 If such service terminates on the last working day of the term, from the day such service begins up to and including the last day of the month concerned; or

B.11.1.3 If such service does not begin on the first working day of the term and also does not terminate on the last working day of the term, from the day such service begins up to and including the last day he/she is so in service.

B.11.2 If a school term commences within the same month in which the preceding term ends, salary will be paid under the circumstances referred to in B.11.1.1:

B.11.2.1 With effect from the first day following the closing date of the preceding term; or

B.11.2.2 With effect from the day following the date on which the services of the educator concerned terminated under any other department of education if he/she so served as an educator at an institution for a continuous period of at least 30 days, including the last working day of the preceding term.

- B.11.3 If a school term ends within the same month in which the following term commences, salary will, under the circumstances referred to in sub-paragraph B.11.1.2, be paid up to and including the last working day of the term in which the service of the educator concerned terminates at a school.
- B.11.4 An educator employed at an institution who is appointed during any term and who renders service for a period of less than 30 days during such term will be paid a salary from the day on which such service begins up to and including the last day the educator is so in service, irrespective of whether such service begins on the first working day of the term or terminates on the last working day of the term, provided that, if he/she renders service up to and including the last working day of the said term and renders service as from the first working day of the following term for a continuous period of at least 30 days, he/she will be paid a salary for the intervening holiday period.
- B.11.5 An educator employed at an institution who is appointed during any term and who renders service for a continuous period of at least 30 days, if such service terminates on the last working day of the last term of the year concerned, will be paid a salary up to and including the last day of such year.
- B.11.6 An educator whose resignation takes effect during any institution closure period or on the first working day for educators following upon such closure period, will, in the application of this measure be deemed to have terminated his/her service on the last day of the calendar month in which the previous term ended.
- B.11.7 An educator whose service terminate on any date by reason of his/her having reached the retiring age shall receive salary up to and including the day preceding such date, unless the services of such educator are retained beyond such date, in which event he/she shall receive salary up to and including the last day on which he/she remains in service, subject to the provisions of paragraph B.11.
- B.11.8 An educator whose services are terminated on the last day of a school term and who is reappointed and assumes duty within the first four school days for educators of the following school term and has rendered service for a continuous period of at least 30 days after assumption of duty, will, notwithstanding measures to the contrary, be entitled to receive salary in respect of the intervening school holiday for which he/she has not already received salary: Provided that if such an educator does not assume duty within the said first four school days and he/she has been granted leave with pay for a period including such four days, he/she will be deemed to have assumed duty within such first four days.
- B.12** **INCORRECTLY GRANTED REMUNERATION** (*Regulation 13 of the Regulations regarding the terms and conditions of employment of educators*)
- B.12.1 If an incorrect salary on appointment, or transfer or promotion or if an incorrect advancement of salary was awarded or granted to an educator, or if the correct salary was awarded or granted but at a time when or in circumstances under which it should not have been awarded or granted to him or her, the employer will correct the educator's salary with effect from the date on which the incorrect salary, or salary advancement commenced, notwithstanding the fact that the educator concerned was unaware that an error had been made in the case where the correction amounts to a reduction of his/her salary.

- B.12.2 If an educator referred to in paragraph B.12.1 has in respect of his/her salary, including any portion of any allowance or other remuneration or any other benefit calculated on his/her basic salary or salary, or awarded to him or her by reason of his/her basic salary.
- B.12.2.1 Been underpaid, an amount equal to the amount of the underpayment will be paid to him or her, and that other benefit which he/she did not receive, will be awarded to him or her as from a current date; or
- B.12.2.2 Been overpaid or received any such other benefit not due to him/her:
- B.12.2.2.1 An amount equal to the amount of the overpayment will be recovered from him or her by way of the deduction from his/her salary in instalments as may be determined by the employer, with due regard to the applicable Treasury Instructions by way of legal proceedings, or partly in the former manner and partly in the latter manner.
- B.12.2.2.2 That other benefit will be discontinued or withdrawn as from a current date, but the educator concerned will have the right to be compensated by the employer for any patrimonial loss which he/she has suffered or will suffer as a result of that discontinuation or withdrawal.
- B.12.3 With the approval of the Treasury the amount of an overpayment to be recovered may be remitted in whole or in part.
- B.13 UNAUTHORISED REMUNERATION** (*Regulation 14 of the Regulations regarding the terms and conditions of employment of educators*)
- B.13.1 In any remuneration, allowance or other reward is received by an educator in connection with the performance of his/her work with the employer other than in accordance with the provisions of the EEA or is received contrary to the provisions of the EEA, that educator shall pay into the relevant Provincial Revenue Fund an amount equal to the amount of such remuneration, allowance or other reward or, where it does not consist of money, the value thereof as determined by the employer, and if he/she does not do so, it shall be recovered by him/her by the employer by way of legal proceedings or in such a manner as the treasury may approve, and be paid into the relevant Provincial Revenue Fund.
- B.13.2 The educator concerned may appeal against such a determination by the employer to the MEC who may make such order as he/she may think fit: Provided that the educator may declare a dispute on grounds of such order in terms of the provisions of the LRA.
- B.13.3 The employer may, with the consent of National Treasury determine that the educator concerned may retain the whole or a portion of the remuneration, allowance or reward.
- B.13.4 If in the opinion of the employer an educator has received any remuneration, allowance or other reward in connection with the performance of his/her work with the employer other than in accordance with the provisions of the Act, and it is still in his/her possession or under his/her control or in the possession or under the control of any other person on his/her behalf, or, if it is money, has been deposited in any deposit-taking financial institution in his/her name or in the name of any other person on his/her behalf, the employer may in writing require that educator or person or that financial institution not to dispose thereof, or, if it is money, not to dispose of a corresponding sum of money, as

the case may be, pending the outcome of any legal steps for the recovery of that remuneration, allowance or reward or the value thereof.

B.13.5 Subject to the provisions of paragraph B.13.6 any salary, allowance, fee, bonus or honorarium which may be payable in respect of the services of an educator who has been made available to a national or provincial department or a council, institution, body or person contemplated in section 7 of the EEA, shall be paid into the Provincial Revenue Fund.

B.13.6 In circumstances regarded by the employer as exceptional, he may recommend to the Treasury the payment out of the Provincial Revenue Fund to the educator concerned of an amount equal to that salary, allowance, fee, bonus or honorarium, or a portion thereof.

B.14 APPOINTMENT AND CONVERSION OF TEMPORARY EDUCATORS TO POSTS ON THE EDUCATOR ESTABLISHMENT (ELRC Collective Agreement No.4 of 2018)

B.14.1 If a funded, substantive and vacant level 1 post needs to be filled urgently, then:

B.14.1.1 The school principal must obtain from the department's database the names of the following educators who are qualified and able to fill the post:

B.14.1.1.1 first-time applicant to whom the employer has a contractual obligation to appoint in terms of the bursary awarded to the applicant and who could act in the post;

B.14.1.1.2 any other first-time applicants; and

B.14.1.1.3 qualified unemployed educators.

B.14.1.2 Preference must be given to the educator in the order set out in paragraph 1.1.1 of Annexure A.

B.14.2 JUSTIFIABLE REASONS FOR THE APPOINTMENT OF TEMPORARY EDUCATORS

B.14.2.1 The employer may employ an educator in a temporary capacity if—

B.14.2.1.1 a temporary appointment is authorised or required by the Employment of Educators Act;

B.14.2.1.2 the work for which the educator is employed is of a limited or definite duration; or

B.14.2.1.3 there is any other justifiable reason for fixing the term of the employment contract.

B.14.2.2 A justifiable reason for employing an educator in a temporary capacity includes, but is not limited to, the following—

B.14.2.2.1 the educator substitutes another educator who is temporarily absent from work;

- B.14.2.2.2 the educator is employed on account of a temporary increase in the volume of work, which is not expected to endure beyond 12 months;
- B.14.2.2.3 the educator is a student or recent graduate who is employed for the purpose of being trained or gaining work experience in order to enter the teaching profession;
- B.14.2.2.4 the educator is employed to work exclusively on a specific project that has a limited or defined duration;
- B.14.2.2.5 the educator is neither a South African citizen nor a permanent resident and has been granted a work permit for a defined period;
- B.14.2.2.6 the educator is employed in a position which is funded by an external source for a limited period; or
- B.14.2.2.7 the educator has reached the retirement age.

B.14.3 RELEVANT FACTORS TO DETERMINE A REASONABLE EXPECTATION

In any dispute concerning whether an educator had an objectively reasonable expectation as contemplated in section 186 (1)(b) of the LRA, a person determining the dispute must take into account all relevant factors, including:

- B.14.3.1 the purpose of and reason for the temporary contract;
- B.14.3.2 the provisions of the employment contract and any other agreements;
- B.14.3.3 the conduct of the employer, including whether the employer has acted consistently, the nature of any undertakings by the employer and whether the undertakings were given by a person with the requisite authority;
- B.14.3.4 the law, practice or custom relating to the renewal of temporary contracts or the conversion of temporary contracts to permanent ones;
- B.14.3.5 the extent to which there have been repeated renewals;
- B.14.3.6 the availability of a post on the educator establishment;
- B.14.3.7 the rights and entitlements of the governing body of the public school;
- B.14.3.8 the public interest; and
- B.14.3.9 the nature and scale of undertaking the provision of public schooling.

B.14.4 THE CONVERSION OF TEMPORARY EDUCATORS TO PERMANENT EDUCATORS

B.14.4.1 Application

This paragraph applies to temporary educators who are appointed on a fixed-term contract to a funded, substantive and vacant level 1 post at a public school that is on

the approved educator establishment. It does **not** apply to temporary educators who substitute permanent educators who are, for whatever reason, absent from their posts.

B.14.4.2 Eligibility for Conversion

- B.14.4.2.1 A temporary educator may only be appointed permanently to funded, substantive and vacant level 1 post at a public school which is on the approved educator establishment if:
- B.14.4.2.2 the temporary educator has been employed in a temporary capacity for a continuous period of at least three months at the time of conversion;
- B.14.4.2.3 the temporary educator qualifies for the post in question;
- B.14.4.2.4 the temporary educator is registered with South African Council of Educators (SACE); and
- B.14.4.2.5 the temporary educator is a citizen or permanent resident of South Africa and is a fit and proper person as contemplated in the Immigration Act 13 of 2002, as amended and section 10 of the Public Service Act, 1994 (Proclamation No. 103 of 1994), as amended.

B.14.4.3 Requirements

- B.14.4.3.1 A temporary educator may only be appointed permanently to a funded, substantive and vacant level 1 post at a public school which is on the approved educator establishment.
- B.14.4.3.2 A temporary educator may only be appointed permanently to such a post if the post cannot be filled by a:
- (a) permanent educator who qualifies for the post and who is in addition of the educator establishment;
 - (b) first-time applicant to whom the employer has a contractual obligation to appoint in terms of the bursary awarded to the applicant; or
 - (c) any other first-time applicant; and
 - (d) the temporary educator is not excluded in terms of the provisions of paragraphs 0 to 0 of this Annexure.
- B.14.4.3.3 The conversion of temporary educator to a permanent educator may be refused if:
- (a) the conversion would result in a contravention of the principles of equity, redress and representivity and the democratic values and principles referred to in section 7 (1) of the Employment of Educators Act;

- (b) the Head of Department decides to follow the normal recruitment and selection processes;
- (c) the temporary educator's appointment was because of a temporary increase in the volume of work which is not expected to endure beyond 12 months; and
- (d) the procedures specified below have not been complied with.

B.14.4.3.4 Unless the Head of Department determines otherwise, a temporary educator may not be converted to a permanent educator if the temporary educator was previously employed as a permanent educator and the educator's permanent employment was terminated as a result of early retirement, ill health or voluntary retrenchment where the educator received a severance package.

B.14.4.3.5 The department may refuse to consider the conversion of a temporary educator to a permanent educator during the 90-day period following the department's determination of the educator establishment of public schools.

B.14.4.4 Conversion Procedures

B.14.4.4.1 The following procedure must be followed with regard to the conversion of a temporary educator to a permanent educator.

B.14.4.4.2 The school principal must submit in writing to the department's district office:

- (a) the profile of the funded, substantive and vacant level 1 post at the school which is occupied by a temporary educator who qualifies for conversion; and
- (b) all relevant information showing that the temporary educator qualifies for conversion.

B.14.4.4.3 The school principal and the governing body must submit written confirmation to the department's district office that there are no educators referred to in paragraph 0 of Annexure A who could be appointed to that post.

B.14.4.4.4 The department must then consider the conversion.

B.14.4.5 Non-favourable Treatment

Subject to the provisions of this collective agreement and Section 6B of the EEA, no educator shall be treated by Provincial Education Department less favourable than the others, in the conversion process of temporary appointment to a permanent appointment, unless there is an objective justifiable reason for such different treatment.

B.14.4.6 General

B.14.4.6.1 The normal 12-month probationary period applies to a temporary educator who is converted to a permanent educator.

- B.14.4.6.2 A first-time applicant for permanent appointment does not lose the status of a first-time applicant because he or she had been employed as a temporary educator.
- B.14.4.6.3 Temporary educators whose contracts have not expired as at the date of implementation of this agreement shall be considered for conversion to permanent educators in terms of this agreement.

Annexure B.2

IMPLEMENTATION OF THE BROAD BAND SALARY SYSTEM ON 1 JULY 1996

NOTE:

- (a) The salary adjustments on 1 July 1996, as set out in the following table, were in accordance with a person's salary as well as his/her post level as on 30 June 1996.
- (b) In instances where two post levels were combined to a new post level, two persons on equivalent salary positions but on two different post levels before 1 July 1996, may have adjusted to different salary positions.

Former qualification category	REQV	Salary notch as on 30 June 1996	Salary as on 1 July 1996	Salary position
Post level 1				
A2	10	20118	23526	3.1
A1	11	20118	23526	3.1
		21972	24615	3.2
		23826	26793	3.4
		25680	28905	4.2
		27534	30951	4.4
		29805	32988	5.1
		32076	35604	5.3
		34347	38220	5.5
		36618	40836	6.1(P)
B	12	21972	27882	4.1
		23826	27882	4.1
		25680	28905	4.2
		27534	30951	4.4
		29805	32988	5.1
		32076	35604	5.3
		34347	38220	5.5
		36618	40836	6.1
		38889	43344	6.2
		41598	45852	6.3
		44307	50868	7.1
		47016	53487	7.2
C	13	29805	40836	6.1
		32076	40836	6.1
		34347	40836	6.1
		36618	43344	6.2
		38889	43344	6.2
		41598	45852	6.3
		44307	50868	7.1
		47016	53487	7.2
		49725	56106	7.3
		52689	58725	7.4
		55653	61344	7.5
		58617	67509	8.2
D-G	14-17	34347	50868	7.1
		36618	50868	7.1
		38889	50868	7.1
		41598	53487	7.2
		44307	53487	7.2
		47016	53487	7.2
		49725	56106	7.2
		52689	58725	7.3
		55653	61344	7.4
		58617	67509	7.5
		61581	71055	8.2
		64899	74601	8.3
		68217	78141	8.4
		71535	81045	9.1(P)
		74853	81045	9.2(P)
			83949	9.3(P)
Post level 2				
A2	10	23826	32988	5.1
A1	11	29805	40836	6.1
		32076	40836	6.1
		34347	40836	6.1
		36618	43344	6.2
B	12	36618	50868	7.1
		38889	50868	7.1
		41598	50868	7.1
		44307	53487	7.2
		47016	53487	7.2
C	13	49725	63963	8.1
		52689	63963	8.1
		55653	63963	8.1
		58617	67508	8.2
		61581	71055	8.3
D-G	14-17	64899	74601	8.4
		55653	63963	8.1
		58617	67509	8.2
		61581	71055	8.3
		64899	74601	8.4
		68217	78141	9.1
		71535	81045	9.2
		74853	83949	9.3
78171	86853	9.4		

Former qualification category	REQV	Salary notch as on 30 June 1996	Salary as on 1 July 1996	Salary position
		81615	92661	9.6
Former post level 3 (new post level 3)				
A2	10	27534	40836	6.1
A1	11	34347	50868	7.1
		36618	50868	7.1
		38889	50868	7.1
		41598	53487	7.2
B	12	41598	63963	8.1
		44307	63963	8.1
		47016	63963	8.1
		49725	67509	8.2
		52689	67509	8.2
C	13	55653	78141	9.1
		58617	78141	9.1
		61581	78141	9.1
		64899	81045	9.2
		68217	81045	9.2
		71535	81045	9.2
		74853	83949	9.3
		78171	86853	9.4
		81615	92661	9.6
		85059	95565	9.7
88503	98463	10.1		
D – G	14 – 17	61581	78141	9.1
		64899	81045	9.2
		68217	81045	9.2
		71535	81045	9.2
		74853	83949	9.3
		78171	86853	9.4
		81615	92661	9.6
		85059	95565	9.7
		88503	98463	10.1
Former post level 4 (new post level 3)				
A1	11	38889	53487	7.2
		41598	53487	7.2
		44307	53487	7.2
		47016	56106	7.3
B	12	47016	67509	8.2
		49725	67509	8.2
		52689	67509	8.2
		55653	71055	8.3
		58617	71055	8.3
C	13	61581	81045	9.2
		64899	81045	9.2
		68217	81045	9.2
		71535	83949	9.3
		74853	83949	9.3
		78171	86853	9.4
		81615	92661	9.6
		85059	95565	9.7
		88503	98463	10.1
D – G	14 – 17	68217	81045	9.2
		71535	83949	9.3
		74853	83949	9.3
		78171	86853	9.4
		81615	92661	9.6
		85059	95565	9.7
		88503	98463	10.1
		91947	102702	10.2
		95391	106941	10.3
Former post level 5 (new post level 4)				
A1	11	44307	63963	8.1
		47016	63963	8.1
		49725	63963	8.1
		52689	67509	8.2
B	12	52689	78141	9.1
		55653	78141	9.1
		58617	78141	9.1
		61581	81045	9.2
		64899	81045	9.2
C	13	68217	98463	10.1
		71535	98463	10.1
		74853	98463	10.1
		78171	102702	10.2
		81615	102702	10.2
		85059	102702	10.2
		88503	106941	10.3
		91947	106941	10.3
		95391	106941	10.3
D – G	14 – 17	74853	98463	10.1
		78171	102702	10.2
		81615	102702	10.2
		85059	102702	10.2
		88503	106941	10.3
		91947	106941	10.3
		95391	106941	10.3
		98835	111180	10.4
		102279	115413	11.1
Former post level 6 (new post level 4)				
		102279	115413	11.1
		106272	123468	11.2
		110265	123468	11.2
Former post level 7 (new post level 5)				
		110265	139578	12.1
		114258	139578	12.1
		119058	139578	12.1
Former post level 8 (new post level 6)				
		131478	163260	13.1

Annexure B.3

**IMPLEMENTATION OF THE NEW POST AND SALARY STRUCTURE ON 1 APRIL 2003
PER POST LEVEL**

Post level 1					
REQV 10			REQV 11		
Position	Old notch	New Notch	Position	Old notch	New Notch
3.1	36630	36630	3.1	36630	36630
3.2	38235	38499	3.2	38499	38499
3.3	39927	40062	3.3	40062	40062
3.4	40836	40869	3.4	40869	40869
4.1	42990	42990P	4.1	42990	42990
4.2	44481	44736P	4.2	44481	44736
4.3	46062	46092P	4.3	46062	46092
4.4	46695	47019P	4.4	46695	47019
4.5	48237	48444P	4.5	48237	48444
			5.1	50859	50859
			5.2	52782	52926
			5.3	54798	55077
			5.4	55686	56187
			5.5	57663	57888
			5.6	59634	59634P
			6.1	62964	62964P
			6.2	66705	66840P
			6.3	70563	70953P
			6.4	72963	73104P
REQV 12			REQV 13+		
Position	Old notch	New Notch	Position	Old notch	New Notch
4.1	42990	42990	6.1	62964	62964
4.2	44481	44736	6.2	66705	66840
4.3	46062	46092	6.3	70563	70953
4.4	46695	47019	6.4	72963	73104
4.5	48237	48444	7.1	78429	78429
5.1	50859	50859	7.2	82311	82434
5.2	52782	52926	7.3	86337	86640
5.3	54798	55077	7.4	88158	88383
5.4	55686	56187	7.5	92100	92100
5.5	57663	57888	8.1	97407	97407
5.6	59634	59634P	8.2	102642	103401
6.1	62964	62964	8.3	108027	108678
6.2	66705	66840	8.4	111189	111972
6.3	70563	70953			
6.4	72963	73104			
7.1	78429	78429P			
7.2	82311	82434P			
7.3	86337	86640P			
7.4	88158	88383P			
7.5	92100	92100P			
Post level 2					
REQV 10			REQV 11		
Position	Old notch	New Notch	Position	Old notch	New Notch
5.1	50859	50859	6.1	62964	62964
5.2	52782	52926	6.2	66705	66840
5.3	54798	55077	6.3	70563	70953
5.4	55686	56187	6.4	72963	73104
5.5	57663	57888			
5.6	59634	59634P			
REQV 12			REQV 13+		
Position	Old notch	New Notch	Position	Old notch	New Notch
7.1	78429	78429	8.1	97407	97407
7.2	82311	82434	8.2	102642	103401
7.3	86337	86640	8.3	108027	108678
7.4	88158	88383	8.4	111189	111972
7.5	92100	92100P	9.1	116310	116310
8.1	97407	97407P	9.2	120636	121038
8.2	102642	102642P	9.3	124956	125958
8.3	108027	108027P	9.4	129282	129774
8.4	111189	111189P	9.5	133605	133707
			9.6	136236	136236P
			9.7	140502	140502P
			9.8		
			9.9		
Post level 3					
REQV 10			REQV 11		
Position	Old notch	New Notch	Position	Old notch	New Notch
6.1	62964	62964	7.1	78429	78429
6.2	66705	66840	7.2	82311	82434
6.3	70563	70953	7.3	86337	86640
6.4	72963	73104	7.4	88158	88383
			7.5	92100	92100P
REQV 12			REQV 13+		
Position	Old notch	New Notch	Position	Old notch	New Notch
8.1	97407	97407	9.1	116310	116310
8.2	102642	103401	9.2	120636	121038
8.3	108027	108678	9.3	124956	125958
8.4	111189	111972	9.4	129282	129774
9.1	116310	116310P	9.5	133605	133707
9.2	120636	121038P	9.6	136236	136236P
9.3	124956	125958P	9.7	140502	140502P
9.4	129282	129774P	10.1	145179	145179
9.5	133605	133707P	10.2	151431	152589
9.6	136236	136236P	10.3	157677	158787
9.7	140502	140502P	10.4	163461	163599
Post level 4					
REQV 11			REQV 12		
Position	Old notch	New Notch	Position	Old notch	New Notch
8.1	97407	97407	9.1	116310	116310
8.2	102642	103401	9.2	120636	121038

Post level 1			REQV 11		
REQV 10			REQV 11		
Position	Old notch	New Notch	Position	Old notch	New Notch
8.3	108027	108678	9.3	124956	125958
8.4	111189	111972	9.4	129282	129774
			9.5	133605	133707
			9.6	136236	136236P
			9.7	140502	140502P
REQV 13+			Post level 5		
10.1	145179	145179	REQV 13+		
10.2	151431	152589	12.1	203853	203853
10.3	157677	158787	12.2	215310	216393
10.4	163461	163599	12.3	226833	227433
11.1	169365	169365			
11.2	181182	181587			
11.3	193008	194691			

Annexure B.4

EDUCATOR SALARY SCALES: JULY 1996 TO JULY 2007 AND TRANSLATION TABLES JANUARY 2008

Broad band salary system: 1 July 1996 – 31 March 2003												New post and salary system: 1 April 2003 – 31 December 2007												OSD 1 January 2008 (Single scale consisting of 221 notches): Translation tables											
Nth	Jul 1996	Jul 1997	Jul 1998	Jul 1999	Jul 2000	Jul 2001	Jul 2002	Jul 2003	Jul 2003	Jul 2004	Jul 2005	Jul 2006	Jul 2007	Nth	REOV 10-13	Nth	REOV 14 PL 1	Nth	Dept Head	Nth	Dep Princ	Nth	Princ- pal	Nth	Office Based	Nth									
3.1	23526	25659	27444	29355	31407	33606	36630	36300	39744	42207	44148	46488	49974	3.1	52008	5																			
									40140	42630	44592	46956	50478	3.2	52524	6																			
									37365	40942	43056	45036	47424	50982	3.3	53052	7																		
									37740	40947	43485	45486	47998	51489	3.4	53580	8																		
									38118	41558	43923	45945	48381	52011	3.5	54120	9																		
									38499	41772	44061	46001	48661	52527	3.6	54660	10																		
									38883	42189	44805	46866	49532	53652	3.7	55212	11																		
									39273	42612	45255	47808	50343	54120	3.8	55764	12																		
									39666	43038	45705	47808	50343	54120	3.9	56316	13																		
									40062	43467	46161	48285	50844	54657	3.10	56880	14																		
									40464	43902	46626	48771	51357	55209	3.11	57444	15																		
									40869	44343	47091	49257	51867	55758	3.12	58020	16																		
									41277	44787	47565	49752	52389	56319	3.13	58608	17																		
									41691	45234	48039	50250	52914	56883	3.14	59184	18																		
									42108	45687	48519	50751	53442	57450	3.15	59784	19																		
									42531	46146	49008	51264	53982	58032	3.16	60384	20																		
									42990	46644	49536	51816	54561	58653	4.1	61596	22																		
									43419	47109	50031	52332	55107	59241	4.2	62208	23																		
									43854	47583	50532	52857	55659	59832	4.3	62832	24																		
									44292	48057	51036	53385	56214	60429	4.4	63456	25																		
									44736	48540	51549	53922	56781	61041	4.5	64092	26																		
									45183	49023	52062	54456	57342	61644	4.6	64740	27																		
									45636	49515	52584	55002	57918	62262	4.7	65376	28																		
									46092	50010	53112	55557	58503	62892	4.8	66036	29																		
									46554	50511	53643	56112	59083	63516	4.9	66696	30																		
									47019	51015	54777	56770	59673	64149	4.10	67368	31																		
									47490	51528	54723	57240	60273	64794	4.11	68040	32																		
									47964	52041	55269	57813	60876	65442	4.12	68712	33																		
									48444	52563	55821	58389	61485	66096	4.13	69408	34																		
									48930	53088	56382	58977	62103	66762	4.14	70092	35																		
									49419	53619	56943	59562	62718	67422	4.15	70800	36																		
									49914	54156	57513	60159	63348	68100	4.16	71508	37																		
									50389	54702	58002	60684	63548	68930	5.1	72216	38																		
									50859	55254	59193	61917	65199	70089	5.2	72948	39																		
									51369	55734	59781	62532	65847	70785	5.3	73668	40																		
									51882	56292	60381	63159	66807	71496	5.4	74412	41																		
									52401	56856	60881	63592	67173	72210	5.5	75156	42																		
									52926	57426	60987	63792	67173	72210	5.5	75900	43																		
									53457	58002	61599	64434	67848	72936	5.6	76668	44																		
									53991	58581	62214	65076	68526	73665	5.7	77436	45																		
									54531	59166	62835	65727	69210	74400	5.8	78204	46																		
									55077	59760	63465	66384	69903	75147	5.9	78984	47																		
									55629	60357	64098	67047	70599	75804	5.10	79776	48																		
									56187	60963	64743	67722	71310	76659	5.11	80580	49																		
									56748	61572	65388	68397	72021	77424	5.12	81384	50																		
									57315	62187	66042	69081	72741	78198	5.13	82200	51																		
									57888	62808	66702	69771	73470	78981	5.14	83016	52																		
									58467	63438	67371	70470	74205	79770	5.15	83844	53																		
									59052	64071	68043	71172	74943	80565	5.16	84684	54																		
									59634	64704	68715	71877	75687	81363																					

Broad band salary system: 1 July 1996 – 31 March 2003													New post and salary system: 1 April 2003 – 31 December 2007													OSD 1 January 2008 (Single scale consisting of 221 notches): Translation tables												
Nth	Jul 1996	Jul 1997	Jul 1998	Jul 1999	Jul 2000	Jul 2001	Jul 2002	Jul 2003	Jul 2004	Jul 2005	Jul 2006	Jul 2007	Nth	Apr 2003	Apr 2004	Apr 2005	Apr 2006	Apr 2007	Nth	REOV 10-13	Nth	REQV 14 P.1	Nth	Dept Head	Nth	Dep Princ	Nth	Princ-pal	Nth	Office Based	Nth							
6.1	40836	44514	47613	50931	54240	57765	62964	68316	72552	75891	79914	85908	6.1	63964	69000	73278	76650	80712	86766	6.2	89 892	60																
								64230	69690	74010	77415	81519	87633	6.3	64872	70386	74751	78189	82332	88506	6.4	92 616	62															
								65520	71088	75498	78972	83157	89394	6.5	66177	71802	76234	79761	83988	90288	6.6	93 540	63															
								66177	71802	76234	79761	83988	90288	6.6	66840	72522	77019	80562	84831	91194	6.7	94 476	65															
								67509	73248	77790	81369	85663	92109	6.8	68184	73980	78567	82182	86538	93027	6.9	95 424	66															
								68865	74718	79380	83001	87399	93854	6.10	69555	75468	80148	83835	88278	94899	6.11	96 384	67															
								70251	76221	80949	84672	89160	95847	6.12	70953	76983	81759	85521	90054	96807	6.13	97 344	68															
								71664	77754	82578	86376	90954	97776	6.14	72381	78534	83403	87240	91863	98754	6.15	98 316	69															
								73104	79317	84234	88110	92781	99741	6.16	73829	80095	85032	88930	94022	101070	6.17	99 300	70															
								79215	85947	91278	95478	100539	108078	7.2	80007	86808	92190	96432	101544	109161	7.3	100 296	71															
								81618	88557	94047	98373	103587	111357	7.5	82434	89442	94986	99537	104629	112470	7.6	101 292	72															
								83259	90336	95937	100350	105669	113505	7.7	84093	91242	96900	101358	106731	114735	7.8	102 312	73															
								84933	92151	97869	103372	107799	115884	7.9	85782	93072	98847	103395	108876	117042	7.10	103 332	74															
								86640	94005	99834	104427	109962	118209	7.11	87507	94944	100833	105471	111060	119391	7.12	104 364	75															
								88383	95895	101841	106527	112173	120885	7.13	89268	96855	102861	107592	113295	121791	7.14	105 388	76															
								90162	97827	103893	108672	114452	123015	7.15	91065	98805	104931	109758	115575	124242	7.16	106 408	77															
								92100	99930	106125	111006	116899	125655		93832	106743	113364	118578	124863	134229	8.2	107 430	78															
								97407	105687	112329	117402	123624	132897	8.1	99366	107811	114498	119766	126114	135573	8.3	108 452	79															
								100359	108891	115641	120960	127371	136923	8.4	101364	109980	116799	122172	128646	138294	8.5	109 474	80															
								102378	111081	117969	123396	129936	139680	8.6	103401	112191	119148	124629	131235	141078	8.7	110 496	81															
								104436	113313	120339	125874	132546	142488	8.8	105480	114447	121542	127134	133872	143913	8.9	111 520	82															
								106536	115593	122760	128406	135213	145353	8.10	108678	117915	125226	130986	137928	148272	8.12	112 544	83															
								109764	119094	126477	133294	139305	149754	8.13	110862	120285	127743	133620	140703	151257	8.14	113 564	84															
								111972	121491	129024	134961	142113	152772	8.15	113091	122703	130311	136305	145529	154293	8.16	114 588	85															

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Broad band salary system: 1 July 1996 – 31 March 2003										New post and salary system: 1 April 2003 – 31 December 2007										OSD 1 January 2008 (Single scale consisting of 221 notches). Translation tables									
Nth	Jul 1996	Jul 1997	Jul 1998	Jul 1999	Jul 2000	Jul 2001	Jul 2002	Jul 2003	Jul 2004	Jul 2005	Jul 2006	Jul 2007	Nth	REOY 10-13	Nth	REOY 14 PL.1	Nth	Dept Head	Nth	Princ- pal	Nth	Office Based	Nth						
1.1.3	131523	142098	149145	156855	166266	177072	193008	197762	209148	222114	232332	244647	262995	11.14							273972	172	273972	172					
1.2.1	139578	150798	158277	165666	175605	187020	203853	194691	211239	224337	234657	247095	265626	11.15							276708	173	276708	173					
								196638	211331	226581	237003	249564	268281	11.16							279480	174	279480	174					
								203853	221181	234894	245700	258723	278127	12.1							296676	180	296676	180					
								205893	223395	237246	248160	261312	280911	12.2							296676	180	296676	180					
								207951	225627	239616	250638	263922	283716	12.3							296676	180	296676	180					
								210030	227883	242013	253146	266562	286554	12.4							299640	181	299640	181					
								212130	230160	244454	255678	269229	289422	12.5							302640	182	302640	182					
1.2.2	147474	159273	167172	174978	185475	197532	215310	214251	232461	246876	258234	271920	292314	12.6							305664	183	305664	183					
								216556	237132	251838	263424	277386	298191	12.8							308724	184	308724	184					
								220743	239505	254358	266058	280158	301170	12.9							311808	185	311808	185					
								222951	241902	256899	268716	282957	304179	12.10							314928	186	314928	186					
								225180	244320	259467	271404	285889	307224	12.11							318072	187	318072	187					
								227433	246765	262065	274119	288648	310296	12.12							321252	188	321252	188					
								229707	249231	264687	276864	291537	313401	12.13							324468	189	324468	189					
								232005	251724	267333	279630	294450	316533	12.14							327708	190	327708	190					
								234327	254244	270006	282426	297396	319701	12.15							330984	191	330984	191					
								236670	256788	272709	285255	300375	322902	12.16															

Annexure B.6

OSD: INCLUSIVE REMUNERATION PACKAGES FOR OFFICE-BASED EDUCATORS (JANUARY 2008 – APRIL 2014)

	Jan 2008	Jul 2008	Jul 2009	Jul 2010	May 2011	May 2012	April 2013	April 2014		Jan 2008	Jul 2008	Jul 2009	Jul 2010	May 2011	May 2012	April 2013	April 2014
001	328200	362664	398931	428 856	458019	490080	522426	561087	040	469464	518760	588006	632112	675096	722352	770028	827010
002	331188	365964	402918	433140	462594	494976	527643	566688	041	473856	523620	593886	638436	681849	729579	777732	835284
003	334188	369288	406947	437472	467220	499926	532920	572355	042	478296	528528	599823	644820	688668	736875	785508	843636
004	337224	372636	411015	441852	471897	504930	538254	578085	043	482772	533472	605820	651264	695550	744240	793359	852069
005	340296	376032	415125	446268	476613	509976	543633	583863	044	487296	538464	611877	657768	702495	751671	801282	860577
006	343404	379464	419274	450720	481368	515064	549057	589686	045	491868	543516	617994	664344	709518	759183	809289	869175
007	346536	382932	423465	455232	486189	520221	554556	595593	046	496488	548628	624171	670992	716619	766782	817389	877875
008	349692	386412	427698	459780	491046	525420	560097	601545	047	501144	553776	630411	677700	723783	774447	825561	886653
009	352896	389952	431973	464376	495954	530670	565695	607557	048	505860	558984	636714	684468	731013	782184	833808	895509
010	356112	393504	436290	469020	500913	535977	571350	613629	049	510612	564228	643080	691320	738330	790014	842154	904473
011	359376	397116	440652	473712	505923	541338	577065	619767	050	515412	569532	649509	698232	745713	797913	850575	913518
012	362664	400752	445056	478440	510975	546744	582828	625956	051	520272	574908	656004	705216	753171	805893	859083	922656
013	365988	404424	449505	483228	516087	552213	588660	632220	052	525168	580320	662562	712260	760695	813945	867666	931872
014	369348	408132	453999	488052	521241	557727	594537	638532	053	530124	585792	669186	719376	768294	822075	876333	941181
015	372744	411888	458538	492936	526455	563307	600486	644922	054	535116	591312	675876	726576	775983	830301	885102	950601
016	376164	415668	463122	497868	531723	568944	606495	651375	055	540168	596892	682632	733836	783738	838599	893946	960099
017	379632	419496	467751	502836	537030	574623	612549	657879	056	545268	602532	689457	741168	791568	846978	902880	969693
018	383124	423360	472428	507864	542400	580368	618672	664455	057	550416	608220	696351	748584	799488	855453	911913	979395
019	386640	427248	477150	512940	547821	586167	624855	671094	058	555612	613956	703334	756072	807486	864009	921033	989190
020	390216	431196	481920	518064	553293	592023	631098	677799	059	560868	619764	710346	763632	815559	872649	930243	999081
021	393804	435156	486738	523248	558828	597945	637410	684579	060	566184	625644	717447	771264	823710	881370	939540	1009065
022	397452	439188	491604	528480	564417	603927	643785	691425	061	571548	631572	724620	778968	831939	890175	948927	1019148
023	401124	443244	496518	533760	570057	609960	650217	698334									
024	404832	447348	501483	539100	575760	616062	656721	705318									
025	408576	451488	506496	544488	581514	622221	663288	712371									
026	412356	455664	511560	549936	587331	628443	669921	719496									
027	416172	459876	516675	555432	593202	634725	676617	728687									
028	420036	464148	521841	560988	599136	641076	683388	733959									
029	423936	468456	527058	566592	605121	647478	690213	741288									
030	427860	472788	532326	572256	611169	653952	697113	748698									
031	431844	477192	537648	577980	617283	660492	704085	756186									
032	435864	481632	543024	583752	623448	667089	711117	763740									
033	439920	486120	548454	589596	629688	673767	718236	771384									
034	444012	490644	553938	595488	635982	680502	725415	779097									
035	448152	495216	559476	601440	642339	687303	732666	786882									
036	452328	499824	565068	607452	648759	694173	739989	794748									
037	456552	504492	570717	613524	655245	701112	747384	802689									
038	460812	509208	576423	619656	661794	708120	754857	810717									
039	465120	513960	582186	625860	668418	715206	762411	818829									

Annexure B.8

**NON-OSD: INCLUSIVE REMUNERATION PACKAGES FOR OFFICE-BASED EDUCATORS
JULY 2005 – MAY 2012**

	Jul 2005	Jul 2006	Jul 2007	Jul 2008	Jul 2009	Jul 2010	May 2011	May 2012
11.1	273393	286203	313164	346056	380664	409215	437043	467637
11.2	276129	289068	316260	349476	384432	413265	441366	472263
11.3	278889	291957	319386	352932	388236	417354	445734	476934
11.4	281679	294879	322542	356412	392064	421470	450129	481638
11.5	284496	297831	325731	369940	395940	425637	454581	486402
11.6	287343	300813	328953	363504	399864	429855	459084	491220
11.7	290217	303822	332208	367092	403812	434100	463620	496074
11.8	293121	306861	335493	370728	407808	438396	468207	500982
11.9	296055	309933	338814	374400	411840	442728	472833	505932
11.10	299016	313032	342168	378096	415908	447102	477504	510930
11.11	302007	316161	345552	381840	420024	451527	482232	515988
11.12	305028	319323	348975	385620	424188	456003	487011	521103
11.13	308082	322521	352431	389448	428400	460530	491847	526275
11.14	311163	325749	355917	393300	432636	465084	496710	531480
11.15	314277	329007	359442	397188	436908	469677	501615	536727
11.16	317421	332298	363003	401124	441240	474333	506589	542049
12.1	324657	339825	371193	410172	451200	485040	518022	554283
12.2	327906	343224	374871	414240	455664	489840	523149	559770
12.3	331185	346659	378582	418344	460188	494703	528342	565326
12.4	334497	350127	382329	422484	464736	499593	533565	570915
12.5	337842	353631	386121	426672	469344	504546	538854	576573
12.6	341223	357168	389943	430896	473988	509538	544188	582282
12.7	344637	360741	393810	435168	478692	514596	549588	588060
12.8	348087	364350	397716	439488	483444	519705	555045	593898
12.9	351570	367995	401658	443844	488232	524850	560541	599778
12.10	355086	371676	405636	448236	493068	530049	566091	605718
12.11	358638	375393	409659	452676	497952	535299	571698	611718
12.12	362226	379149	413718	457164	502884	540603	577365	617781
12.13	365850	382944	417822	461700	507876	545967	583092	623907
12.14	369510	386772	421965	466272	512904	551373	588867	630087
12.15	373296	390642	426147	470904	518004	556857	594723	636354
12.16	376941	394554	430377	475572	523140	562377	600618	642660

Annexure B.9

OSD FOR EDUCATIONS THERAPISTS AND PSYCHOLOGISTS: SALARY SCALES, POST CLASS CODES AND JOB TITLE CODES: 2010 - 2014

Job title	Post class code	Job title code	Nth	July 2010	May 2011	May 2012	April 2013	April 2014
Education Therapist Grade 1	School-based: 60011	School-based: 60011	1	173949	185778	198783	211902	227583
			2	176562	188568	201768	215085	231000
			3	179211	191397	204795	218310	234465
			4	181899	194268	207867	221586	237984
			5	184632	197187	210990	224916	241560
			6	187398	200142	214152	228285	245178
			7	190212	203145	217365	231711	248859
			8	193062	206190	220623	235185	252588
			9	195957	209283	223932	238713	256377
			10	198894	212418	227286	242286	260214
Education Therapist Grade 2	School-based: 60012	School-based: 60012	1	204906	218841	234159	249612	268083
			2	207981	222123	237672	253359	272109
			3	211101	225456	241239	257160	276189
			4	214272	228843	244863	261024	280341
			5	217485	232275	248535	264939	284544
			6	220749	235761	252264	268914	288813
			7	224061	239298	256050	272949	293148
			8	227421	242886	259887	277041	297543
			9	230832	246528	263784	281193	302001
			10	234297	250230	267747	285417	306537
Education Therapist Grade 3	School-based: 60013	School-based: 60013	1	241374	257787	275832	294036	315795
			2	244998	261657	279972	298449	320535
			3	248673	265584	284175	302931	325347
			4	252402	269565	288435	307473	330225
			5	256188	273609	292761	312084	335178
			6	260031	277713	297153	316764	340206
			7	263934	281883	301614	321522	345315
			8	267894	286110	306138	326343	350493
			9	271914	290403	310731	331239	355752
			10	275988	294756	315390	336207	361086
			11	280131	299181	320124	341253	366507
			12	284331	303666	324924	346368	372000
			13	288600	308226	329802	351570	377586
			14	292926	312846	334746	356838	383244
Chief Education Therapist Grade 1	School-based: 60015	School-based: 60014	1	256188	273609	292761	312084	335178
	Office-based: 60016	Office-based: 60016	2	260031	277713	297153	316764	340206
			3	263934	281883	301614	321522	345315
			4	267894	286110	306138	326343	350493
			5	271914	290403	310731	331239	355752
			6	275988	294756	315390	336207	361086
			7	280131	299181	320124	341253	366507
			8	284331	303666	324924	346368	372000
Chief Education Therapist Grade 2	School-based: 60015	School-based: 60015	1	292926	312846	334746	356838	383244
			2	297321	317538	339765	362190	388992
			3	301779	322299	344859	367620	394824
			4	306306	327135	350034	373137	400749
	Office-based: 60017	Office-based: 60017	5	310902	332043	355287	378735	406761
			6	315567	337026	360618	384420	412866
			7	320301	342081	366027	390186	419061
			8	325104	347211	371517	396036	425343
Education Therapist Specialist Grade 1	Office-based: 60012	Office-based: 60018	1	284331	303666	324924	346368	372000
			2	288600	308226	329802	351570	377586
			3	292926	312846	334746	356838	383244
			4	297321	317538	339765	362190	388992
			5	301779	322299	344859	367620	394824
			6	306306	327135	350034	373137	400749
			7	310902	332043	355287	378735	406761
			8	315567	337026	360618	384420	412866
Education Therapist Specialist Grade 2	Office-based: 60019	Office-based: 60019	1	325104	347211	371517	396036	425343
			2	329979	352419	377088	401976	431721
			3	334926	357702	382740	408000	438192
			4	339951	363069	388485	414126	444771
			5	345048	368511	394308	420333	451437
			6	350226	374040	400224	426639	458211
			7	355479	379653	406230	433041	465087
			8	360810	385344	412317	439530	472056

Job title	Post class code	Job title code	Nth	July 2010	May 2011	May 2012	April 2013	April 2014
Senior Education Therapist Specialist Grade 1	Office-based: 60013	Office-based: 60020		(Package)	(Package)	(Package)	(Package)	(Package)
			1	443364	508161	543732	579618	622509
			2	450009	515784	551889	588315	631851
			3	456762	523524	560172	597144	641334
			4	463611	531378	568575	606102	650955
			5	470568	539346	577101	615189	660714
			6	477624	547440	585762	624423	670629
			7	484788	555648	594543	633783	680682
			8	492063	563982	603462	643290	690894
Senior Education Therapist Specialist Grade 2	Office-based: 60013	Office-based: 60021		(Package)	(Package)	(Package)	(Package)	(Package)
			1	544,035	581028	621699	662730	711771
			2	552,195	589743	631026	672675	722454
			3	560,475	598587	640488	682761	733284
			4	568,881	607566	650097	693003	744285
			5	577413	616677	659844	703395	755445
			6	586077	625929	669744	713946	766779
			7	594870	635322	679794	724659	778284
			8	603792	644850	689991	735531	789960
			9	612849	654522	700338	746559	801804
			10	622041	664341	710844	757761	813834
Education Counsellor Grade 1	School-based: 60021	School-based: 60022		(Package)	(Package)	(Package)	(Package)	(Package)
	1	318312	339957	363753	387762	416457		
	Office-based: 60031	Office-based: 60027	2	323068	345057	369210	393579	422703
	3	327933	350232	374748	399480	429042		
Education Psychometrist Grade 1	School-based: 60041	School-based: 60034	4	332853	355488	380373	405477	435483
	Office-based: 60051	Office-based: 60039	5	337845	360819	386076	411558	442014
Education Counsellor Grade 2	60023	School-based: 60023	6	342912	366231	391866	417729	448641
		Office-based: 60028	7	348051	371718	397737	423987	455361
		8	353274	377298	403710	430356	462201	
			(Package)	(Package)	(Package)	(Package)	(Package)	
		1	363954	388704	415914	443364	471672	
		Office-based: 60028	2	369411	394530	422148	450009	483309
		3	374952	400449	428481	456762	490563	
		4	380577	406455	434907	463611	497919	
Education Psychometrist Grade 2	60035	School-based: 60040	5	386266	412554	441432	470568	505389
		Office-based: 60040	6	392079	418740	448053	477624	512967
		7	397962	425022	454773	484788	520662	
		8	403932	431400	461598	492063	528477	
Education Counsellor/ Grade 3	60024	School-based: 60024		(Package)	(Package)	(Package)	(Package)	(Package)
		1	416142	444441	475551	506937	544449	
		Office-based: 60029	2	422382	451104	482682	514539	552615
		3	428718	457872	489924	522258	560904	
		4	435147	464736	497268	530088	569316	
		School-based: 60036	5	441672	471705	504723	538035	577851
		Office-based: 60041	6	448299	478782	512298	546111	586524
		7	455022	485964	519981	554301	595320	
Education Psychometrist Grade 3	60041	8	461847	493254	527781	562614	604248	
			(Package)	(Package)	(Package)	(Package)	(Package)	
		1	416142	444441	475551	506937	544449	
		Office-based: 60026	2	422382	451104	482682	514539	552615
		3	428718	457872	489924	522258	560904	
		4	435147	464736	497268	530088	569316	
		School-based: 60037	5	441672	471705	504723	538035	577851
		Office-based: 60042	6	448299	478782	512298	546111	586524
7	455022	485964	519981	554301	595320			
Chief Education Counsellor Grade 1	School-based: 60025	School-based: 60025	8	461847	493254	527781	562614	604248
	Office-based: 60026	Office-based: 60030		(Package)	(Package)	(Package)	(Package)	(Package)
	1	416142	444441	475551	506937	544449		
	2	422382	451104	482682	514539	552615		
	3	428718	457872	489924	522258	560904		
	4	435147	464736	497268	530088	569316		
	School-based: 60035	School-based: 60037	5	441672	471705	504723	538035	577851
	Office-based: 60042	Office-based: 60042	6	448299	478782	512298	546111	586524
7	455022	485964	519981	554301	595320			
Chief Education Counsellor Grade 2	School-based: 60026	School-based: 60026	8	461847	493254	527781	562614	604248
	Office-based: 60031	Office-based: 60031		(Package)	(Package)	(Package)	(Package)	(Package)
	1	475806	508161	543732	579618	622509		
	2	482943	515784	551889	588315	631851		
	3	490191	523524	560172	597144	641334		
	4	497544	531378	568575	606102	650955		
	School-based: 60038	School-based: 60038	5	505005	539346	577101	615189	660714
	Office-based: 60043	Office-based: 60043	6	512583	547440	585762	624423	670629
	7	520269	555648	594543	633783	680682		
8	526072	563982	603462	643290	690894			
9	535995	572442	612513	652938	701256			
Senior Education Counsellor Specialist Grade 1	Office-based: 60023	Office-based: 60032		(Package)	(Package)	(Package)	(Package)	(Package)
			1	512583	547440	585762	624423	670629
			2	520269	555648	594543	633783	680682
			3	526072	563982	603462	643290	690894
Senior Education Psychometrist Specialist Grade 1	Office-based: 60033	Office-based: 60044	4	535995	572442	612513	652938	701256
			5	544035	581028	621699	662730	711771
			6	552195	589743	631026	672675	722454
			7	560475	598587	640488	682761	733284
			8	568881	607566	650097	693003	744285

Job title	Post class code	Job title code	Nth	July 2010	May 2011	May 2012	April 2013	April 2014
Senior Education Counsellor Specialist Grade 2		Office-based: 60033		(Package)	(Package)	(Package)	(Package)	(Package)
			1	586077	625929	669744	713946	766779
			2	594870	635322	679794	724659	778284
		Office-based: 60045	3	603792	644850	689991	735531	789960
			4	612849	654522	700338	746559	801804
			5	622041	664341	710844	757761	813834
			6	631371	674304	721506	769125	826041
7	640842	684420	732330	780663	838431			
Education Psychologist Grade 1	School-based: 60061	School-based: 60046		(Package)	(Package)	(Package)	(Package)	(Package)
			1	392079	418740	448053	477624	512967
			2	397962	425022	454773	484788	520662
			3	403932	431400	461598	492063	528477
	Office-based: 60071	Office-based: 60049	4	409992	437871	468522	499443	536403
			5	416142	444441	475551	506937	544449
			6	422382	451104	482682	514539	552615
			7	428718	457872	489924	522258	560904
8	435147	464736	497268	530088	569316			
Education Psychologist Grade 2	School-based: 60047			(Package)	(Package)	(Package)	(Package)	(Package)
			1	461547	493254	527781	562614	604248
			2	468777	500655	535701	571056	613314
			3	475806	508161	543732	579618	622509
	Office-based: 60050		4	482943	515784	551889	588315	631851
			5	490191	523524	560172	597144	641334
			6	497544	531378	568575	606102	650955
			7	505005	539346	577101	615189	660714
8	512583	547440	585762	624423	670629			
Education Psychologist Grade 3	School-based: 60048			(Package)	(Package)	(Package)	(Package)	(Package)
			1	535995	572442	612513	652938	701256
			2	544035	581028	621699	662730	711771
			3	552195	589743	631026	672675	722454
	Office-based: 60051		4	560475	598587	640488	682761	733284
			5	568881	607566	650097	693003	744285
			6	577413	616677	659844	703395	755445
			7	586077	625929	669744	713946	766779
			8	594870	635322	679794	724659	778284
			9	603792	644850	689991	735531	789960
			10	612849	654522	700338	746559	801804
			11	622041	664341	710844	757761	813834
12	631371	674304	721506	769125	826041			
Senior Education Psychologist Grade 1	Office-based: 60043	Office-based: 60052		(Package)	(Package)	(Package)	(Package)	(Package)
			1	568881	607566	650097	693003	744285
			2	577413	616677	659844	703395	755445
			3	586077	625929	669744	713946	766779
			4	594870	635322	679794	724659	778284
			5	603792	644850	689991	735531	789960
			6	612849	654522	700338	746559	801804
			7	622041	664341	710844	757761	813834
8	631371	674304	721506	769125	826041			
Senior Education Psychologist Grade 2		Office-based: 60053		(Package)	(Package)	(Package)	(Package)	(Package)
			1	650454	694686	743313	792372	851007
			2	660210	705105	754461	804255	863769
			3	670113	715680	765777	816318	876726
			4	650163	726414	777264	828564	889878
			5	690366	737310	788922	840990	903222
			6	700722	748371	800757	853608	916776
			7	711231	759594	812766	866409	930522
			8	721899	770988	824958	879405	944481
			9	732726	782550	837330	892593	958644
10	743721	794295	849897	905991	973035			

Annexure B.10**OSD RANK AND SALARY CODES FOR SCHOOL-BASED AND OFFICE-BASED EDUCATORS**

SALARY LEVEL (PRE-OSD)	OSD RANK CODE	OSD RANK DESCRIPTION	RVQ	OSD SCALE CODE	OSD JOB TITLE
SL3	62102	EDUCATION SPECIALIST Additional	10	0012011	62102
SL3	62102	EDUCATION SPECIALIST Additional	11	0012011	62102
SL4	62102	EDUCATION SPECIALIST Additional	12	0012011	62102
SL6	62102	EDUCATION SPECIALIST Additional	13	0012011	62102
SL7	62102	EDUCATION SPECIALIST Additional	14	0012011	62102
SL7	62102	EDUCATION SPECIALIST Additional	15	0012011	62102
SL7	62102	EDUCATION SPECIALIST Additional	16	0012011	62102
SL7	62102	EDUCATION SPECIALIST Additional	17	0012011	62102
SL5	62102	EDUCATION SPECIALIST Additional	10	0012011	62102
SL6	62102	EDUCATION SPECIALIST Additional	11	0012011	62102
SL7	62102	EDUCATION SPECIALIST Additional	12	0012011	62102
SL8	62112	EDUCATION SPECIALIST	13	1082011	62112
SL8	62112	EDUCATION SPECIALIST	14	1082011	62112
SL8	62112	EDUCATION SPECIALIST	15	1082011	62112
SL8	62112	EDUCATION SPECIALIST	16	1082011	62112
SL8	62112	EDUCATION SPECIALIST	17	1082011	62112
SL9	62112	EDUCATION SPECIALIST	13	1082011	62112
SL9	62112	EDUCATION SPECIALIST	14	1082011	62112
SL9	62112	EDUCATION SPECIALIST	15	1082011	62112
SL9	62112	EDUCATION SPECIALIST	16	1082011	62112
SL9	62112	EDUCATION SPECIALIST	17	1082011	62112
SL6	62103	EDUCATION SPECIALIST ADDITIONAL, SENIOR	10	0012091	62103
SL7	62103	EDUCATION SPECIALIST ADDITIONAL, SENIOR	11	0012091	62103
SL8	62103	EDUCATION SPECIALIST ADDITIONAL, SENIOR	12	0012091	62103
SL9	62113	EDUCATION SPECIALIST, SENIOR	13	1262091	62113
SL9	62113	EDUCATION SPECIALIST, SENIOR	14	1262091	62113
SL9	62113	EDUCATION SPECIALIST, SENIOR	15	1262091	62113
SL9	62113	EDUCATION SPECIALIST, SENIOR	16	1262091	62113
SL9	62113	EDUCATION SPECIALIST, SENIOR	17	1262091	62113
SL10	62113	EDUCATION SPECIALIST, SENIOR	13	1262091	62113
SL10	62113	EDUCATION SPECIALIST, SENIOR	14	1262091	62113
SL10	62113	EDUCATION SPECIALIST, SENIOR	15	1262091	62113
SL10	62113	EDUCATION SPECIALIST, SENIOR	16	1262091	62113
SL10	62113	EDUCATION SPECIALIST, SENIOR	17	1262091	62113
		Non-Inclusive Remuneration Package			
SL8	62105	EDUCATION SPECIALIST Additional, DEPUTY CHIEF	11	0012151	62105
SL9	62105	EDUCATION SPECIALIST Additional, DEPUTY CHIEF	12	0012151	62105
SL10	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	13	1472151	62115
SL10	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	14	1472151	62115
SL10	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	15	1472151	62115
SL10	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	16	1472151	62115
SL10	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	17	1472151	62115

SALARY LEVEL (PRE-OSD)	OSD RANK CODE	OSD RANK DESCRIPTION	RVQ	OSD SCALE CODE	OSD JOB TITLE
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	13	1472151	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	14	1472151	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	15	1472151	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	16	1472151	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	17	1472151	62115
		Inclusive Remuneration Package			
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	13	0010551	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	14	0010551	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	15	0010551	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	16	0010551	62115
SL11	62115	EDUCATION SPECIALIST, DEPUTY CHIEF	17	0010551	62115
		Non-Inclusive Remuneration Package			
SL12	62106	EDUCATION SPECIALIST, CHIEF	13	1772211	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	14	1772211	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	15	1772211	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	16	1772211	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	17	1772211	62106
		Inclusive Remuneration Package			
SL12	62106	EDUCATION SPECIALIST, CHIEF	13	0010611	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	14	0010611	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	15	0010611	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	16	0010611	62106
SL12	62106	EDUCATION SPECIALIST, CHIEF	17	0010611	62106
SL3	62001	TEACHER	10	0040551	62001
SL3	62001	TEACHER	11	0040551	62001
SL4	62001	TEACHER	12	0040551	62001
SL6	62001	TEACHER	13	0561381	62001
SL7	62001	TEACHER	13	0561381	62001
SL7	62001	TEACHER	14	0851681	62001
SL7	62001	TEACHER	15	0851681	62001
SL7	62001	TEACHER	16	0851681	62001
SL7	62001	TEACHER	17	0851681	62001
SL8	62001	TEACHER, SENIOR	13	1031381	62002
SL8	62001	TEACHER, SENIOR	14	1031681	62002
SL8	62001	TEACHER, SENIOR	15	1031681	62002
SL8	62001	TEACHER, SENIOR	16	1031681	62002
SL8	62001	TEACHER, SENIOR	17	1031681	62002
SL9	62001	TEACHER, MASTER	13	1201381	62003
SL9	62001	TEACHER, MASTER	14	1201681	62003
SL9	62001	TEACHER, MASTER	15	1201681	62003
SL9	62001	TEACHER, MASTER	16	1201681	62003
SL9	62001	TEACHER, MASTER	17	1201681	62003
SL5	62022	DEPARTMENTAL HEAD - Transitional	10	0012011	62022
SL6	62022	DEPARTMENTAL HEAD - Transitional	11	0012011	62022
SL7	62022	DEPARTMENTAL HEAD - Transitional	12	0012011	62022
SL8	62032	DEPARTMENTAL HEAD	13	1082011	62032
SL8	62032	DEPARTMENTAL HEAD	14	1082011	62032
SL8	62032	DEPARTMENTAL HEAD	15	1082011	62032
SL8	62032	DEPARTMENTAL HEAD	16	1082011	62032
SL8	62032	DEPARTMENTAL HEAD	17	1082011	62032

SALARY LEVEL (PRE-OSD)	OSD RANK CODE	OSD RANK DESCRIPTION	RVQ	OSD SCALE CODE	OSD JOB TITLE
SL9	62032	DEPARTMENTAL HEAD	13	1082011	62032
SL9	62032	DEPARTMENTAL HEAD	14	1082011	62032
SL9	62032	DEPARTMENTAL HEAD	15	1082011	62032
SL9	62032	DEPARTMENTAL HEAD	16	1082011	62032
SL9	62032	DEPARTMENTAL HEAD	17	1082011	62032
SL6	62023	Deputy Principal - Transitional	10	0012091	62023
SL7	62023	Deputy Principal - Transitional	11	0012091	62023
SL8	62023	Deputy Principal - Transitional	12	0012091	62023
SL9	62033	Deputy Principal	13	1262091	62033
SL9	62033	Deputy Principal	14	1262091	62033
SL9	62033	Deputy Principal	15	1262091	62033
SL9	62033	Deputy Principal	16	1262091	62033
SL9	62033	Deputy Principal	17	1262091	62033
SL10	62033	Deputy Principal	13	1262091	62033
SL10	62033	Deputy Principal	14	1262091	62033
SL10	62033	Deputy Principal	15	1262091	62033
SL10	62033	Deputy Principal	16	1262091	62033
SL10	62033	Deputy Principal	17	1262091	62033
SL3	62024	Principal-S1	10	0011861	62024
SL3	62024	Principal-S1	11	0011861	62024
SL4	62024	Principal-S1	12	0011861	62024
SL6	62024	Principal-S1	13	0011861	62024
SL7	62024	Principal-S1	13	0011861	62024
SL7	62024	Principal-S1	14	0011861	62024
SL7	62024	Principal-S1	15	0011861	62024
SL7	62024	Principal-S1	16	0011861	62024
SL7	62024	Principal-S1	17	0011861	62024
SL8	62024	Principal-S1	13	0011861	62024
SL8	62024	Principal-S1	14	0011861	62024
SL8	62024	Principal-S1	15	0011861	62024
SL8	62024	Principal-S1	16	0011861	62024
SL8	62024	Principal-S1	17	0011861	62024
SL9	62024	Principal-S1	13	0011861	62024
SL9	62024	Principal-S1	14	0011861	62024
SL9	62024	Principal-S1	15	0011861	62024
SL9	62024	Principal-S1	16	0011861	62024
SL9	62024	Principal-S1	17	0011861	62024
SL5	62034	Principal P1-Transitional	10	0011861	62034
SL6	62034	Principal P1-Transitional	11	0011861	62034
SL7	62034	Principal P1-Transitional	12	0011861	62034
SL8	62044	Principal P1	13	1081861	62044
SL8	62044	Principal P1	14	1081861	62044
SL8	62044	Principal P1	15	1081861	62044
SL8	62044	Principal P1	16	1081861	62044
SL8	62044	Principal P1	17	1081861	62044
SL9	62044	Principal P1	13	1081861	62044
SL9	62044	Principal P1	14	1081861	62044
SL9	62044	Principal P1	15	1081861	62044

SALARY LEVEL (PRE-OSD)	OSD RANK CODE	OSD RANK DESCRIPTION	RVQ	OSD SCALE CODE	OSD JOB TITLE
SL9	62044	Principal P1	16	1081861	62044
SL9	62044	Principal P1	17	1081861	62044
SL6	62054	Principal P2-Transitional	10	0012011	62054
SL7	62054	Principal P2-Transitional	11	0012011	62054
SL8	62054	Principal P2-Transitional	12	0012011	62054
SL9	62064	Principal P2	13	1262011	62064
SL9	62064	Principal P2	14	1262011	62064
SL9	62064	Principal P2	15	1262011	62064
SL9	62064	Principal P2	16	1262011	62064
SL9	62064	Principal P2	17	1262011	62064
SL7	62074	Principal P3-Transitional	10	0012151	62074
SL8	62074	Principal P3-Transitional	11	0012151	62074
SL9	62074	Principal P3-Transitional	12	0012151	62074
SL10	62084	Principal P3	13	1442151	62084
SL10	62084	Principal P3	14	1442151	62084
SL10	62084	Principal P3	15	1442151	62084
SL10	62084	Principal P3	16	1442151	62084
SL10	62084	Principal P3	17	1442151	62084
SL8	62094	Principal P4-Transitional	10	0012181	62094
SL9	62094	Principal P4-Transitional	11	0012181	62094
SL10	62094	Principal P4-Transitional	12	0012181	62094
SL11	62104	Principal P4	13	1592181	62104
SL11	62104	Principal P4	14	1592181	62104
SL11	62104	Principal P4	15	1592181	62104
SL11	62104	Principal P4	16	1592181	62104
SL11	62104	Principal P4	17	1592181	62104
SL9	62114	Principal P5-Transition	10	0012211	62114
SL10	62114	Principal P5-Transition	11	0012211	62114
SL11	62114	Principal P5-Transition	12	0012211	62114
SL12	62124	Principal P5	13	1802211	62124
SL12	62124	Principal P5	14	1802211	62124
SL12	62124	Principal P5	15	1802211	62124
SL12	62124	Principal P5	16	1802211	62124
SL12	62124	Principal P5	17	1802211	62124

Annexure B.11

JULY 2018 EQUALISATION SCALE

Progression Table 1 July 2018

New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code
1	116,043		161,289	66		67	161,772	132	223,980	133	224,652	198	309,870	199	310,800				
2	117,207	3	117,558	68		69	163,407	134	226,233	135	226,911	200	312,981	201	313,920				
4	118,389	5	118,743	70		71	165,036	136	228,486	137	229,170	202	316,107	203	317,055				
6	119,550	7	119,910	72		73	166,659	138	230,784	139	231,477	204	319,263	205	320,220				
8	120,753	9	121,116	74		75	168,369	140	233,082	141	233,781	206	322,467	207	323,433				
10	121,947	11	122,313	76		77	170,029	142	235,425	143	236,130	208	325,698	209	326,676				
12	123,177	13	123,546	78		79	171,744	144	237,771	145	238,485	210	328,953	211	329,940				
14	124,383	15	124,755	80		81	173,457	146	240,156	147	240,876	212	332,229	213	333,225				
16	125,652	17	126,030	82		83	175,188	148	242,547	149	243,276	214	335,562	215	336,570				
18	126,906	19	127,287	84		85	176,937	150	244,971	151	245,706	216	338,901	217	339,918				
20	128,196	21	128,580	86		87	178,716	152	247,665	153	248,409	218	342,315	219	343,341				
22	129,456	23	129,843	88		89	180,495	154	250,131	155	250,881	220	345,708	221	346,746				
24	130,746	25	131,139	90		91	182,298	156	252,642	157	253,401	222	349,185	223	350,232				
26	132,054	27	132,450	92		93	184,134	158	255,162	159	255,927	224	352,668	225	353,727				

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New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code
28	133,365	29	133,764	94	185,433	95	185,988	160	257,721	161	258,495	226	356,211	227	357,279				
30	134,697	31	135,102	96	187,284	97	187,845	162	260,298	163	261,078	228	359,757	229	360,837				
32	136,062	33	136,470	98	189,156	99	189,723	164	262,899	165	263,688	230	365,328	231	366,423				
34	137,391	35	137,802	100	191,028	101	191,601	166	265,515	167	266,313	232	368,985	233	370,092				
36	138,810	37	139,227	102	192,930	103	193,509	168	268,167	169	268,971	234	372,696	235	373,815				
38	140,193	39	140,613	104	194,859	105	195,444	170	270,867	171	271,680	236	376,392	237	377,520				
40	141,579	41	142,005	106	196,818	107	197,409	172	273,567	173	274,389	238	380,175	239	381,315				
42	142,989	43	143,418	108	198,774	109	199,371	174	276,318	175	277,146	240	383,961	241	385,113				
44	144,438	45	144,870	110	200,766	111	201,369	176	279,068	177	279,906	242	387,810	243	388,974				
46	145,872	47	146,310	112	202,794	113	203,403	178	281,868	179	282,714	244	391,677	245	392,853				
48	147,333	49	147,774	114	204,792	115	205,407	180	284,685	181	285,540	246	395,589	247	396,777				
50	148,788	51	149,235	116	206,847	117	207,468	182	287,532	183	288,396	248	399,564	249	400,764				
52	150,453	53	150,903	118	208,912	119	209,544	184	290,406	185	291,276	250	403,554	251	404,766				
54	151,950	55	152,406	120	211,017	121	211,650	186	293,301	187	294,180	252	407,601	253	408,825				
56	153,477	57	153,936	122	213,111	123	213,750	188	296,229	189	297,117	254	411,678	255	412,914				
58	155,028	59	155,493	124	215,238	125	215,883	190	299,169	191	299,652	256	415,803	257	417,051				
60	156,567	61	157,038	126	217,380	127	218,031	192	300,780	193	301,683	258	419,952	259	421,212				

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New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code
62	158,115	158,589	219,567	128	220,227	194	303,786	304,698	424,146	260	428,373	261	425,418				
64	159,714	160,194	221,790	130	222,456	196	306,816	307,737	428,373	262	428,373	263	429,657				

New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code
264	432,657	433,956	334	613,338	335	615,177	404	868,830	405	871,437	406	880,161					
266	437,013	438,324	336	619,470	337	621,327	406	877,527	407	880,161	407	888,966					
268	441,369	442,692	338	625,674	339	627,552	408	886,308	409	888,966	409	897,836					
270	445,785	447,123	340	631,917	341	633,813	410	895,152	411	897,837	411	906,837					
272	450,228	451,578	342	638,244	343	640,158	412	904,119	413	906,837	413	915,906					
274	454,719	456,084	344	644,640	345	646,575	414	913,167	415	915,906	415	925,056					
276	459,285	460,662	346	651,069	347	653,022	416	922,290	417	925,056	417	934,299					
278	463,875	465,267	348	657,588	349	659,562	418	931,503	419	934,299	419	943,649					
280	468,507	469,914	350	664,152	351	666,144	420	940,824	421	943,649	421	953,097					
282	473,187	474,606	352	670,791	353	672,804	422	950,241	423	953,097	423						

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New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code
284	477,924	285	479,358	354	677,523	355	679,557	424	959,748	425	962,628
286	482,706	287	484,155	356	684,282	357	686,334	426	969,321	427	972,228
288	487,548	289	489,012	358	691,137	359	693,210	428	979,032	429	981,969
290	492,408	291	493,884	360	698,043	361	700,137	430	988,821	431	991,788
292	497,310	293	498,801	362	705,015	363	707,130	432	998,724	432	998,724
294	502,320	295	503,826	364	712,065	365	714,201				
296	507,324	297	508,845	366	719,172	367	721,329				
298	512,397	299	513,933	368	726,384	369	728,562				
300	517,530	301	519,084	370	733,629	371	735,831				
302	525,546	303	527,124	372	740,976	373	743,199				
304	530,805	305	532,398	374	748,389	375	750,633				
306	536,091	307	537,699	376	755,877	377	758,145				
308	541,470	309	542,319	378	763,413	379	765,702				
310	544,299	311	545,931	380	771,048	381	773,361				
312	549,747	313	551,397	382	778,752	383	781,089				
314	555,264	315	556,929	384	786,555	385	788,916				
316	560,781	317	562,464	386	794,439	387	796,821				

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New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code
318	566,409	319	568,107	388	802,377	389	804,783				
320	572,073	321	573,789	390	810,387	391	812,817				
322	577,803	323	579,537	392	818,508	393	820,965				
324	583,563	325	585,315	394	826,692	395	829,173				
326	589,398	327	591,165	396	834,933	397	837,438				
328	595,305	329	597,090	398	843,306	399	845,835				
330	601,266	331	603,069	400	851,739	401	854,295				
332	607,269	333	609,090	402	860,244	403	862,824				

Inclusive Package

New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code
1	734,736		1,010,121	65		66	1,013,151
3	742,071	4	744,297	67		68	1,023,279
5	749,493	6	751,740	69		70	1,033,506
7	756,996	8	759,267	71		72	1,043,835
9	764,562	10	766,857	73		74	1,054,263
11	772,185	12	774,501	75		76	1,064,814
13	779,925	14	782,265	77		78	1,075,464
15	787,719	16	790,083	79		80	1,086,207
17	795,588	18	797,976	81		82	1,097,079
19	803,538	20	805,950	83		84	1,108,047
21	811,578	22	814,014	85		86	1,119,123
23	819,684	24	822,144	87		88	1,130,295
25	827,883	26	830,367	89		90	1,141,587
27	836,148	28	838,656	91		92	1,153,017
29	844,518	30	847,053	93		94	1,164,546
31	852,972	32	855,531	95		96	1,176,177
33	861,486	34	864,069	97		98	1,187,946

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New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code	New notch code after 2018 translation	Value of the new notch code	New notch code after 2018 progression	Value of the new notch code
35	870,096	36	872,706	99	1,196,241	100	1,199,829
37	878,790	38	881,427	101	1,208,208	102	1,211,832
39	887,571	40	890,235	103	1,220,277	104	1,223,937
41	896,451	42	899,139	105	1,232,466	106	1,236,162
43	905,412	44	908,127	107	1,244,805	108	1,248,540
45	914,457	46	917,199	109	1,257,237	110	1,261,008
47	923,607	48	926,379	111	1,269,798	112	1,273,608
49	932,841	50	935,640	113	1,282,506	114	1,286,355
51	942,171	52	944,997	115	1,295,334	116	1,299,219
53	951,585	54	954,441	117	1,308,288	118	1,312,212
55	961,110	56	963,993	119	1,321,356	120	1,325,319
57	970,710	58	973,623	121	1334562	121	1334562
59	980,412	60	983,352				
61	990,216	62	993,186				
63	1,000,110	64	1,003,110				

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Notch h Code	Notch Value 1/7/2019	Notch h Code	Notch Value 1/7/2019	Notch h Code	Notch Value 1/7/2019	Notch h Code	Notch Value 1/7/2019	Notch h Code	Notch Value 1/7/2019	Notch h Code	Notch Value 1/7/2019	Notch h Code	Notch Value 1/7/2019
5	126	80	184	155	267	230	387	305	565	380	813	4	786
6	720	81	212	156	768	231	126	306	527	381	576	5	915
7	127	82	185	157	269	232	387	307	568	382	817	6	790
8	344	83	127	158	112	233	309	308	347	383	602	7	830
9	127	84	186	159	270	234	391	309	570	384	821	8	794
10	998	85	051	160	432	235	188	310	519	385	706	9	784
11	128	86	186	161	271	236	393	311	571	386	825	10	806
12	625	87	975	162	794	237	120	312	188	387	780	11	750
13	129	88	187	163	273	238	395	313	574	388	829	12	802
14	255	89	908	164	150	239	121	314	320	389	941	13	743
15	129	90	188	165	274	240	397	315	576	390	834	14	806
16	897	91	841	166	521	241	056	316	873	391	033	15	733
17	130	92	189	167	275	242	399	317	579	392	838	16	810
18	554	93	795	168	871	243	039	318	078	393	257	17	768
19	131	94	190	169	277	244	401	319	580	394	842	18	814
20	205	95	728	170	266	245	049	320	071	395	391	19	776
21	131	96	191	171	278	246	403	321	582	396	846	20	818
22	131	97	191	172	278	247	050	322	936	397	633	21	850
	844	88	685	163	640	238	050	313	203				
	132	89	192	164	280	239	405	314	585				
	489	90	642	165	038	240	024	315	888				
	133	91	193	166	281	241	407	316	588				
	173	92	599	167	424	242	064	317	771				
	133	93	194	168	282	243	409	318	591				
	845	94	559	169	825	244	095	319	711				
	134	95	195	170	284	245	411	320	594				
	475	96	549	171	238	246	147	321	675				
	135	97	196	172	285	247	413	322	597				
	180		503		648		169		648				
	135		197		287		415		600				
	852		520		067		245		588				
	136		198		288		417		603				
	551		483		525		315		627				
	137		199		289		419		606				
	208		491		932		394		612				
	137		200		291		421		609				
	892		484		402		473		672				

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Notch Code	138	600	139	269	139	959	140	661	141	357	142	056	142	770	143	478	144	186	930	145	629	146	346	147	105	147	858	148	542	149	331	150	075	150	810			
Notch Value 1/7/2019	138	600	139	269	139	959	140	661	141	357	142	056	142	770	143	478	144	186	930	145	629	146	346	147	105	147	858	148	542	149	331	150	075	150	810			
Notch Code	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115																				
Notch Value 1/7/2019	201	486	202	482	203	481	204	507	205	506	206	532	207	561	208	590	209	649	210	675	211	731	212	793	213	855	214	908	216	015	217	062	218	142	219	255		
Notch Code	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190																				
Notch Value 1/7/2019	292	854	294	330	295	773	297	261	298	746	300	243	301	719	303	243	304	746	306	276	307	791	309	336	310	869	312	420	313	977	315	537	317	106	318	231		
Notch Code	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265																				
Notch Value 1/7/2019	423	609	425	685	427	839	429	963	432	129	434	256	436	449	438	612	440	823	442	995	445	221	447	435	449	667	451	899	454	146	456	411	458	691	460	959		
Notch Code	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340																				
Notch Value 1/7/2019	612	681	615	750	618	816	621	906	624	987	628	140	631	236	634	428	637	563	640	764	643	944	647	166	650	376	653	637	656	874	660	186	663	441	666	771		
Notch Code	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415																				
Notch Value 1/7/2019	889	818	894	201	898	719	903	165	907	692	912	201	916	752	921	306	925	929	930	504	935	193	939	819	944	526	949	221	953	985	958	695	963	534	968	295		
Notch Code	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39																				
Notch Value 1/7/2019	860	625	864	894	869	217	873	546	877	914	882	267	886	677	891	099	895	554	900	018	904	518	909	000	913	545	918	087	922	677	927	261	931	896	936	528		
Notch Code	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113																				
Notch Value 1/7/2019	1243	524	1249	719	1255	968	1262	220	1268	532	1274	847	1281	222	1287	582	1294	020	1300	443	1306	944	1313	463	1320	030	1326	579	1333	212	1339	836	1346	535	1353	246		

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Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019
41	151	116	220	191	318	266	463	341	670	416	973	40	941
42	572	117	332	192	879	267	308	342	089	417	158	41	211
43	152	118	221	193	320	268	465	343	673	418	977	42	945
44	310	119	415	194	271	269	570	344	446	419	988	43	894
45	153	120	222	195	322	270	467	345	676	420	982	44	950
46	072	121	537	196	065	271	925	346	773	421	884	45	622
47	153	122	223	197	323	272	470	347	680	422	987	46	955
48	852	123	638	198	004	273	259	348	196	423	756	47	350
49	154	124	224	199	323	274	472	349	683	424	992	48	960
50	596	125	772	200	661	275	608	350	547	425	718	49	126
51	155	126	225	201	325	276	474	351	686	426	997	50	964
52	382	127	876	202	278	277	945	352	979	427	626	51	893
53	156	128	227	203	326	278	477	353	690	428	1 002	52	969
54	159	129	004	204	895	279	318	354	399	429	651	53	717
55	156	130	228	205	328	280	479	355	693	430	1 007	54	974
56	936	131	144	206	515	281	697	356	858	431	610	55	550
57	157	132	229	207	330	282	482	357	725	432	1 012	56	979
58	713	133	269	208	156	283	082	358	284		686	57	422
	158	124	230		331	274	484		700		1 017		884
	487	125	409		812	275	479		782		690		294
	159	126	231		333	276	486		704		1 022		989
	291	127	549		444	277	921		265		784		214
	160	128	232		335	278	489		707		1 027		994
	260	129	707		127	279	312		894		875		137
	160	130	233		336	280	491		711		1 033		999
	863	131	880		789	281	787		294		032		108
	161	132	235		338	282	494		714		1 038		1004
	856	133	023		472	283	226		894		126		073
	162	134	236		340	284	496		718		1 043		1009
	663	135	247		155	285	698		407		361		092
	163	136	237		341	286	499		722		1 048		1014
	479	137	387		868	287	164		022		527		120
	164	138	238		343	288	501		725		1 050		1019
	283	139	581		548	289	660		616		657		190
	165	140	239		345	290	504		729		1 024		251
	135	141	790		297	291	147		258				

Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019	Notch Code	Notch Value 1/7/2019
59	165	134	240	209	346	284	506	359	732						
	930		978		995		682		852						
60	166	135	242	210	348	285	509	360	736						
	773		160		747		184		545						
61	167	136	243	211	350	286	511	361	740						
	613		378		475		752		196						
62	168	137	244	212	352	287	514	362	743						
	423		593		218		281		901						
63	169	138	245	213	353	288	516	363	747						
	275		829		979		885		594						
64	170	139	247	214	355	289	519	364	751						
	127		029		755		429		338						
65	170	140	248	215	357	290	522	365	755						
	949		274		501		036		061						
66	171	141	249	216	359	291	524	366	758						
	801		516		292		637		838						
67	172	142	250	217	361	292	527	367	762						
	680		770		092		232		609						
68	173	143	251	218	362	293	529	368	766						
	538		997		910		866		446						
69	174	144	253	219	364	294	532	369	770						
	378		272		680		545		220						
70	175	145	254	220	366	295	535	370	774						
	269		532		510		140		093						
71	176	146	255	221	368	296	537	371	777						
	142		810		355		849		942						
72	176	147	257	222	370	297	540	372	781						
	991		070		194		534		845						
73	177	148	258	223	372	298	543	373	785						
	897		360		009		228		703						
74	178	149	259	224	373	299	545	374	789						
	809		647		890		916		666						
75	179	150	260	225	375	300	548	375	793						
	646		940		747		673		572						

Annexure B.13

MINIMUM AND MAXIMUM NOTCHES – WITH EFFECT FROM 1 JULY 2019

Rank	Job Title	REQV	Old Notch Codes (1/4/2018)		Values (1/4/2018)		New Notch Codes (1/7/2018)		Values (1/7/2018)		New Notch Codes (1/4/2019)		Values (1/4/2019)		New Notch Codes (1/7/2019)		Values (1/7/2019)	
			Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max
General Classroom Teacher																		
Teacher	6200 1	10, 11, and 12	00 1	05 5	116 043	196 818	00 1	10 6	116 043	196 818	00 1	10 6	123 237	209 022	00 1	10 6	123 237	209 022
Teacher	6200 1	13	05 6	13 8	198 774	441 369	10 8	26 8	198 774	441 369	10 8	26 8	211 098	466 527	10 8	26 8	211 098	466 527
Senior Teacher	6200 2	13	10 3	13 8	312 981	441 369	20 0	26 8	312 981	441 369	20 0	26 8	330 822	466 527	20 0	26 8	330 822	466 527
Master Teacher	6200 3	13	12 0	13 8	368 985	441 369	23 2	26 8	368 985	441 369	23 2	26 8	390 018	466 527	23 2	26 8	390 018	466 527
Teacher	6200 1	14, 15, 16 & 17	08 5	16 8	262 899	589 398	16 4	32 6	262 899	589 398	16 4	32 6	279 198	620 046	16 4	32 6	279 198	620 046
Senior Teacher	6200 2	14, 15, 16 & 17	10 3	16 8	312 981	589 398	20 0	32 6	312 981	589 398	20 0	32 6	330 822	620 046	20 0	32 6	330 822	620 046
Master Teacher	6200 3	14, 15, 16 & 17	12 0	16 8	368 985	589 398	23 2	32 6	368 985	589 398	23 2	32 6	390 018	620 046	23 2	32 6	390 018	620 046

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Rank	Job Title	REQV	Old Notch Codes (1/4/2018)		Values (1/4/2018)		New Notch Codes (1/7/2018)		Values (1/7/2018)		New Notch Codes (1/4/2019)		Values (1/4/2019)		New Notch Codes (1/7/2019)		Values (1/7/2019)		
			Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min
Management (school-based)																			
	Departmental Head	2	10	20	328	818	21	39	328	818	21	39	347	861	21	39	348	863	
			8	1	953	508	0	2	953	508	0	2	703	069	0	2	747	655	
	Deputy Principal	3	12	20	391	886	24	40	391	886	24	40	414	932	24	40	415	935	
			6	9	677	308	4	8	677	308	4	8	003	397	4	8	245	193	
	Principal S1	4	00	18	116	705	00	36	116	705	00	36	123	741	00	36	123	743	
			1	6	043	015	1	2	043	015	1	2	237	675	1	2	237	901	
	Principal P1	4	10	18	328	705	21	36	328	705	21	36	347	741	21	36	348	743	
			8	6	953	015	0	2	953	015	0	2	703	675	0	2	747	901	
	Principal P2	4	12	20	391	818	24	39	391	818	24	39	414	861	24	39	415	863	
			6	1	677	508	4	2	677	508	4	2	003	069	4	2	245	655	
	Principal P3	4	14	21	468	940	28	42	468	940	28	42	495	989	28	42	496	992	
			4	5	507	824	0	0	507	824	0	0	213	748	0	0	698	718	
	Principal P4	4	15	21	541	969	30	42	541	969	30	42	569	1	30	42	570	1	
			9	8	470	321	8	6	470	321	8	6	625	019	8	6	519	022	
	Principal P5	4	18	22	664	998	35	43	664	998	35	43	698	1	35	43	700	1	
			0	1	152	724	0	2	152	724	0	2	688	657	0	2	782	657	
Specialist (office-based)																			
	Education Specialist	2	10	20	328	818	21	39	328	818	21	39	347	861	21	39	348	863	
			8	1	953	508	0	2	953	508	0	2	703	069	0	2	747	655	
	Senior Education Specialist	3	12	20	391	886	24	40	391	886	24	40	414	932	24	40	415	935	
			6	9	677	308	4	8	677	308	4	8	003	397	4	8	245	193	
	Deputy Chief Education Specialist	5	14	21	482	940	28	42	482	940	28	42	510	989	28	42	511	992	
			7	5	706	824	6	0	706	824	6	0	219	748	6	0	752	718	
	Chief Education Specialist	6	17	22	644	998	34	43	644	998	34	43	678	1	34	43	680	1	
			7	1	640	724	4	2	640	724	4	2	162	050	4	2	196	050	
	Deputy Chief Education Specialist (Package)	5	00	05	734	257	1	10	734	257	1	10	772	1	00	10	775	1	
			1	5	736	237	1	9	736	237	1	9	941	613	1	9	263	579	

Rank	Job Title	REQV	Old Notch Codes (1/4/2018)		Values (1/4/2018)		New Notch Codes (1/7/2018)		Values (1/7/2018)		New Notch Codes (1/4/2019)		Values (1/4/2019)		New Notch Codes (1/7/2019)		Values (1/7/2019)	
			Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max	Min	Max
Chief Education Specialist (Package)	6210 6	13,14,15,16, and 17	01 7	06 1	861 486	334 562	03 3	12 1	861 846	1334 562	03 3	12 1	906 282	403 958	03 3	12 1	909 000	403 958

CHAPTER C: ALLOWANCES AND OTHER PAYMENTS

- C.1 GENERAL**
- C.2 ALLOWANCE TO A PRINCIPAL OF A SCHOOL WITH ONLY ONE EDUCATOR POST**
- C.3 ALLOWANCES TO EDUCATORS WHO PERFORM SUPERVISORY DUTIES AT HOSTELS**
- C.4 ACTING ALLOWANCE**
- C.5 EDUCATORS PAID ON A PER-HOUR BASIS FOR TUITION OR FULL-TIME EDUCATORS WHO PERFORM PAID OVERTIME DUTIES**
- C.6 EDUCATORS APPOINTED ON A PROPORTIONAL BASIS**
- C.7 PAYMENT OF EDUCATORS VOLUNTARILY PERFORMING ADDITIONAL DUTIES**
- C.8 EDUCATORS WHO PERFORM EDUCATIONAL SUPERVISORY DUTIES AT INSTITUTIONS DURING INSTITUTION CLOSURE PERIOD**

C.1 GENERAL

- C.1.1 The Minister may determine measures for the payment of differentiated allowances to educators appointed at certain education institutions or appointed to certain posts. *(Regulation 17 of the Regulations regarding the terms and conditions of employment of educators)*

C.2 ALLOWANCE TO A PRINCIPAL OF A SCHOOL WITH ONLY ONE EDUCATOR POST (ELRC Collective Agreement No. 1 of 2008)

A non-pensionable allowance, which equals 6% of the educator's basic salary is payable to an educator at post level 1 who holds the post of principal at a one-educator school.

C.3 ALLOWANCE TO EDUCATORS WHO PERFORM SUPERVISORY DUTIES AT HOSTELS

C.3.1 The Level of Supervisory Duties at Hostels

There are, at most, three levels of work, but it is not essential that all three levels have to be utilised in hostels. The levels and the functions attached to them are as follows:

C.3.1.2 Level 1

Normally the head of the educational institution (e.g. principal of the school) is classified under level 1 and he/she is in overall control of all the hostels.

C.3.1.2.1 General

- (a) Responsible for every aspect of the hostel's activities in accordance with the provincial department's policy.
- (b) Determines policy in respect of the educational, economic and administrative matters within the framework as prescribed by the department concerned.
- (c) Exercises the necessary control to ensure that the policy is implemented.

C.3.1.2.2 Educational

Exercises overall control in respect of the discipline and spirit in the hostel, including the welfare, study and recreation of boarders.

C.3.1.2.3 Economic

Controls the economic function in accordance with the policy of the department and bears the final responsibility. Responsibility is thus accepted for the compilation of the budget, the obtaining of certain tenders and the control and management of all supplies to ensure the most efficient and economic utilisation thereof.

C.3.1.2.4 Administrative

Responsible for all administrative duties which are necessary for the efficient running of a hostel. This includes, inter alia, and where applicable, the following:

- (a) Recommendations in respect of the appointment of staff.
- (b) Periodic reports and recommendations in respect of buildings, equipment, etc.
- (c) General management of staff.
- (d) Handling of applications for admission of boarders.
- (e) Collection of boarding fees.
- (f) Compilation of duty sheets for staff.

C.3.1.3 Level II

Normally every hostel has a supervisor on level II.

C.3.1.3.1 General

Practically implements the educational, economic and administrative policy as laid down.

C.3.1.3.2 Educational

Responsible for the spirit and discipline in the hostel in respect of the welfare, study and recreation of boarders.

C.3.1.3.3 Economic

Responsible for the controlling of supplies, accounts, bookkeeping, registers, the obtaining of tenders and all other duties connected with the post.

C.3.1.3.4 Administrative

Responsible for all administrative duties necessary for the efficient running of a hostel. This includes inter alia, the following:

- (a) Recommendations in respect of the appointment of staff.
- (b) Periodic reports and recommendations in respect of buildings, equipment, grounds, etc.
- (c) Management of staff.
- (d) Handling of applications for admission of boarders.
- (e) Collection of boarding fees.

C.3.1.4 Level III

The number of persons that is utilised at this level is directly related to the number of hostel enrolments. Those persons concerned perform educational and other duties such as:

- C.3.1.4.1 Carrying out the educational programme.
- C.3.1.4.2 Maintenance of general discipline in the hostel, neatness of boarders, their rooms, the buildings and grounds.

C.3.2 Grading Scales

C.3.2.1 Hostels are distinguished according to the following numbers of hostel enrolments:

- 0 to 60
- 61 to 120
- 121 to 300
- 301 and more

C.3.2.2 Where, in terms of approved educational policy in respect of post-provision scales, weighting on the actual pupil numbers based on their disabilities, occurs at specific institutions in order to determine the number of posts, a corresponding weighting of the actual hostel enrolment is made with a view to determining the number of hostel enrolments for the purposes of paragraph C.3.2.1.

C.3.3 Basis for Remuneration

C.3.3.1 Payment is in the form of a non-pensionable allowance based on a specific percentage of the basic payment (salary position plus any pensionable allowance) of the educator concerned. The percentage paid is as follows:

Level	Hostel enrolments			
	0 – 60	61 - 120	121 – 300	301 and more
I	12.5%	13.5%	14.5%	15.5%
II	12.5%	13.5%	14.5%	15.5%
III	12.5%	12.5%	12.5%	12.5%

- C.3.3.2 The basic remuneration in respect of levels I and II must be reduced by the following percentages in those cases where not all the functions mentioned in paragraph C.3.1.2 and C.3.1.3 above are performed:

Function	Percentage reduction
Educational	50%
Administrative	25%
Economic	25%

- C.3.3.3 Rounding off of non-pensionable allowances: The amount determined in terms of paragraph C.3.3.1 must be rounded off to the nearest higher five cents per month.
- C.3.3.3 An educator who performs supervisory duties at a hostel may be remunerated for duties performed at only one of the above-mentioned three levels of work.

C.4 ACTING ALLOWANCES

C.4.1 General Measures

- C.4.1.1 Educators employed on post level 6 and those on SMS do not qualify for the payment of acting allowances.
- C.4.1.2 An educator, complying with the minimum requirements in paragraph B.3.2 of Chapter B, must be appointed in writing by the employer to act.
- C.4.1.3 An educator may only be appointed to act in a post that is one post level higher than his/her current position.
- C.4.1.4 Within fourteen days of notification by the employer, an SGB will be requested to recommend to the employer the educator to be appointed to act in a higher post.
- C.4.1.5 In extraordinary circumstances, the employer may deviate from C.4.1.1 and C.4.1.2 above (including instances where the SGB fails to make a recommendation).
- C.4.1.6 The acting allowance that will apply is the difference between the acting educator's current basic salary (without benefits) and the commencing notch (without benefits) that applies to the position in which the educator is acting, provided that the allowance equals at least 6%.

Where the acting educator's current basic salary (without benefits) equals or exceeds the commencing notch of the higher post (without benefits) that applies to the position in which the person is acting, the acting allowance will be at least 6 %. (*ELRC Collective Agreement 1 of 2008*)

Examples (2012 salary scale used):

- Teacher A (post level 1 and REQV 14) acts in a post level 2 post. She is on notch code 96 (R193809).

Calculation of acting allowance:

- Add 6% (6 notches) to notch code 96 = notch code 102 (R205719). Notch code 102 is lower than the minimum notch applicable to post level 2.
- The minimum notch code = 108 (R218388).
- Acting allowance is equal to the difference between notch code 108 (R218388) and Teacher A's current basic salary (R193809, notch code 96).

2. Teacher B (post level 2) acts in a post level 3 post. He is on notch code 133 (R278799).

Calculation of acting allowance:

- Add 6% (6 notches) to notch code 133 = notch code 139 (R295950). Notch code 139 is beyond the minimum notch applicable to a post level 3 post (notch code 126).
- Acting allowance is equal to the difference between notch code 139 (R295950) and the educator's current basic salary (R278799, notch code 133).

3. Teacher C (post level 3) acts in a post level 4 post (P4 principal post). She is on notch code 130 (R270603).

Calculation of acting allowance:

- Add 6% (6 notches) to notch code 130 = notch code 136 (R287235). Notch code 136 is lower than the minimum salary notch applicable to a P4 post (notch code 159).
- Acting allowance is equal to the difference between notch code 159 (R359475) and the educator's current basic salary (R270603, notch code 130).

4. Teacher D (post level 3) acts in a post level 4 post (P2 principal post). She is on notch code 130 (R270603).

Calculation of acting allowance:

- Add 6% (6 notches) to notch code 130 = notch code 136 (R287235). Notch code 136 is beyond the minimum notch applicable to a P2 principal post (notch code 126).
- Acting allowance is equal to the difference between notch code 136 (R287235) and the educator's current basic salary (R270603, notch code 130).

Note: Should one of the notches referred to in paragraph B.8.3.1 fall within the 6%, the principle of "at least 6%" must be adhered to in order to calculate the acting allowance.

- C.4.1.7 Prior to 1 April 2003 the following applied with regard to the calculation of the allowance for an educator acting in a vacant post on a higher post level or, as from 21 February 2003, for an educator who acts in a higher post where the incumbent is absent (refer to paragraph C.4.3 below): The acting allowance that will apply is the difference between

the acting person's current salary (without benefits) and the commencing notch of the higher post (without benefits) that applies to the position in which the person is acting. Where the acting person's current salary (without benefits) equals or exceeds the commencing notch of the higher post (without benefits) that applies to the position in which the person is acting, the acting allowance that will apply is one notch. (*ELRC Resolution 8 of 2001 and ELRC Resolution 8 of 2002*)

C.4.1.8 For the period April 2003 to April 2008 the following applied with regard to the calculation of the allowance for an educator acting in a vacant post on a higher post level or an educator who acts in a higher post where the incumbent is absent (refer to paragraph C.4.3 below): The acting allowance that will apply is the difference between the acting person's current salary (without benefits) and the commencing notch of the higher post (without benefits) that applies to the position in which the person is acting. Where the acting person's current salary (without benefits) equals or exceeds the commencing notch of the higher post (without benefits) that applies to the position in which the person is acting, the acting allowance that will apply is at least 3%. (*ELRC Collective Agreement 4 of 2003*)

C.4.1.9 Where the acting is to be performed at an institution or office that is geographically removed from the educator's current place of work, an applicable subsistence and travel allowance will also be paid to him/her.

C.4.1.10 An educator who has been appointed to act in a certain post will be subject to all the responsibilities appropriate to the post for the period during which he/she is appointed.

C.4.2 Acting Allowance for an Educator Acting in a Higher Vacant and Funded Post (*ELRC resolution No. 8 of 2001*)

C.4.2.1 An acting allowance may only be paid if the educator is appointed to act for a period longer than six weeks, but limited to a maximum of twelve months.

C.4.2.2 Compensation shall be backdated to the date on which the educator commenced acting

C.4.3 Acting Allowance for an Educator Acting in a Higher Post where the Permanent Incumbent is Absent (*Collective Agreement No. 8 of 2002*)

C.4.3.1 An acting allowance will only be paid to an educator who acts for a period longer than twelve (12) weeks, but limited to a maximum of twelve months. The acting allowance will be paid only to an educator who acts in such a post where the permanent incumbent is absent due to the following:

- Maternity leave
- Sick leave
- Study leave
- Suspension
- Secondment

C.4.3.2 Compensation will be backdated to the date on which the educator commenced acting provided that the acting is twelve (12) consecutive weeks or longer.

C.5 EDUCATORS PAID ON A PER-HOUR BASIS FOR TUITION OR FULL-TIME EDUCATORS WHO PERFORM PAID OVERTIME DUTIES

C.5.1 Per-Hour Tariffs

The following tariffs are applicable in respect of formal tuition contact hours:

C.5.1.1 Tuition in an educational context up to and including Grade 12:

C.5.1.1.1 Qualifications of REQV 13 and higher

Formula:
$$\frac{\text{OSD notch code 108}}{900}$$
 rounded off to the nearest five cents

C.5.1.1.2 Qualifications lower than REQV 13

Formula:
$$\frac{\text{OSD notch code 55}}{900}$$
 rounded off to the nearest five cents.

C.5.1.2 Tuition in an educational context beyond Grade 12:

Formula:
$$\frac{\text{OSD notch code 126}}{900}$$
 rounded off to the nearest five cents.

Note: In the case of educators on a personal salary position: The last salary position of the applicable salary range.

C.5.2 Measures in Respect of Educators Who are Paid on a Per Hour Basis or Full-Time Educators who Perform Paid Overtime Duties

C.5.2.1 In principle the existing practices whereby full-time educators receive additional remuneration on a per-hour basis or overtime remuneration, must be phased out.

C.5.2.2 Overtime remuneration/remuneration on a per-hour basis to full-time educators for tuition over and above the normal timetable load can be made only if –

C.5.2.2.1 The required authorisation has been specifically given.

C.5.2.2.2 Such tuition does not prejudice any obligations, including the normal timetable load, that is expected from the educator; or

C.5.2.2.3 Such an educator must conduct tuition during his vacation leave on a part time basis because a substitute is not available and after the HoD has satisfied himself/herself that no other arrangement is possible.

C.5.2.3 Existing authorisations remain in force for the time being but under no circumstances may the measure contained in paragraph C.5.1 above be interpreted as being an extension of the existing authorisation for overtime remuneration or additional per-hour payment.

C.6 EDUCATORS APPOINTED ON A PROPORTIONAL BASIS

C.6.1 Pro-Rata Remuneration Basis

The following formula applies: (*ELRC Collective Agreement No. 7 of 2003*)

Number of hours per week for which the educator is appointed, divided by the number of hours per week that would have applied to a full-time appointment, multiplied by the salary that would have applied to the person concerned had he/she been appointed in a full-time capacity.

Provided that the total number of hours for which educators, who are sharing a post are remunerated, may not exceed the number of working hours applicable to a full-time appointment and the total number of hours of work performed by educators appointed in a shared capacity, correspond with the total workload requirements of the post concerned.

C.6.2 Recognition of Experience

Experience gained during periods of pro-rata appointments is converted to full-time experience as follows:

Number of hours per week for which the educator was appointed, divided by the number of hours per week that would have applied to a full-time appointment, multiplied by the period of such appointment. (*ELRC Collective Agreement No. 7 of 2003*)

C.7 PAYMENT OF EDUCATORS VOLUNTARILY PERFORMING ADDITIONAL DUTIES (*Government Gazette No 30536, dated 7 December 2007*)

C.7.1 The guidelines below form the basis for the payment of educators who voluntarily perform additional duties. The payment of such educators is subject to the following:

C.7.1.1 That participation by educators is optional and not compulsory.

C.7.1.2 That the payment is linked to additional work requirements, and not usual duties which may or may not have been performed during this time.

C.7.1.3 That the schools identified for offering these projects or the teachers involved may not charge or levy any costs or contributions from other parties including payment from SGBs for rendering such assistance.

C.7.1.4 That the selection of educators for specific tasks/assignments is done on clear, open and transparent criteria.

- C.7.1.5 That the educator has performed his/her duties at a satisfactory level and the tasks/assignments does not interfere with the normal duties of the educator. In this regard the principal/supervisor of the educator will need to sign a statement to this effect.
- C.7.1.6 That the employer and employee sign a contract which would detail the nature of the task, the time frames, the deliverables, the authorization by the principal/supervisor, the remuneration, the time frames of the contract and any other relevant details.
- C.7.1.7 That the employer, at an appropriate level, verifies and signs off on all work, confirming that it has been done to the satisfaction of the employer.
- C.7.1.8 That the employer designs the necessary criteria, forms and registers to manage the system.
- C.7.1.9 That a report on the utilization of this mechanisms, needs to be reflected in the Annual Report of the employer concerned.
- C.7.2 Employers may only consider payments for such additional tasks/assignments where they are fully convinced of the need of these, and can demonstrate the ability to properly administer such programmes and ensure that they are not abused.

C.7.3 Calculation of Payment

- C.7.3.1 Limited to the number of hours or days worked, times a rate, calculated by dividing the annual basic salary of an educator by 1800 (the number of working hours expected per year), for hourly-based work or the annual basic salary of the educator divided by 225 for a 7-hour workday.
- C.7.3.2 The employer may negotiate a lower rate.

C.8 EDUCATORS WHO PERFORM EDUCATIONAL SUPERVISORY DUTIES AT INSTITUTIONS FOR LEARNERS WITH BEHAVIOUR PROBLEMS OR AT SPECIAL SCHOOLS DEALING WITH CHILDREN IN TERMS OF THE CHILDREN'S ACT DURING INSTITUTION CLOSURE PERIODS THAT ARE OUTSIDE OF SCHEDULED WORKING TIME (ELRC Collective Agreement No. 7 of 2001 and Government Gazette No 22961, dated 19 December 2001)

- C.8.1 For each day of at least seven hours that an educator performs duties in respect of the conducting of educational programmes or performing educational supervisory duties at an institution for learners with behaviour problems he or she shall be additionally remunerated at the rate of the educator's current annual salary, without benefits, divided by 365.
- C.8.2 The additional remuneration shall only apply in respect of duties performed on days during an institution closure period that is outside of the scheduled working time table as determined by the Minister.
- C.8.3 Days on which an educator is required to perform duties for a shorter period than seven hours, a pro rata portion of the amount calculated in terms of the formula in paragraph C.8.1 will be applicable. For this purpose, the number of full hours that the educator was required to work must be taken into account.

CHAPTER D: PUBLIC EXAMINATIONS

- D.1 DUTIES PERFORMED IN RESPECT OF PUBLIC EXAMINATIONS**
D.2 REMUNERATION FOR THE PERFORMANCE OF EXAMINATION-RELATED DUTIES
D.3 COMPENSATION FOR TRAVEL AND SUBSISTENCE EXPENSES
D.4 CRITERIA FOR THE APPOINTMENT OF EDUCATORS FOR EXAMINATION-RELATED WORK

Amendment of Paragraph D.1. of the Policy**1. Paragraph D.1. is hereby amended by-**

- (a) the substitution of sub-paragraph (D.1.1) of the following sub-paragraph-

D.1 DUTIES PERFORMED IN RESPECT OF PUBLIC EXAMINATION AND NATIONAL ASSESSMENT.

D.1.1 A person who has been appointed to perform duties in respect of a public examination or national assessment shall be remunerated for actual work done in respect of a specific category of public examination and national assessment-related work. This remuneration, as well as compensation for travel and subsistence expenses, is expressed in terms of a standard tariff which, in certain cases, relates to the level at which the work is done and which is defined as follows:

D.1.1.1 The Minister will gazette the standard tariffs annually.

D.1.1.2 Level I:

Examination-related work in respect of [instructional offerings] subjects at a level lower than that mentioned in paragraph D.1.1.3.

Standard tariff = 0,10% of the first salary position of a REQV 14 post level 1 educator, rounded off to the nearest [five] ten cents.

Note: For purposes of this Chapter the first salary position of a REQV 14 post level 1 educator is notch code 164.

D.1.1.3 Level II:

Examination-related work in respect of [instructional offerings] subjects for Grade 12 as stated in the National Policy pertaining to the programme and promotion requirements for the National Curriculum Statement Grades R to 12, published in Government Gazette No. 36042 of 28 December 2012.

Standard tariff = 0,13% of the first salary position of a REQV 14 post level 1 educator, rounded off to the nearest [five] ten cents.

[D.1.1.4 Level III:

Examination-related work in respect of instructional offerings at a level higher than that mentioned in paragraph D.1.1.2.

Standard tariff = 0,15% of the first salary position of a REQV 14 post level 1 educator, rounded off to the nearest five cents.]

- (b) the insertion of sub-paragraph D.1.2. following sub-paragraph D.1.1-

D.1.2 PUBLIC EXAMINATION AND NATIONAL ASSESSMENT-RELATED DUTIES

D.1.2.1 Setting of question papers, tests or test items.

D.1.2.1.1 Examiner

The Examiner is the person who is appointed as part of a panel responsible for the setting of the question paper(s) and the accompanying marking guideline at national and/or provincial level, which will be used for the May/June examinations or the October/November examinations or for the National Assessment relating to the General Education Certificate (GEC) and Systemic Evaluation. The examiner may be required to develop individual test items and then consolidate these test items into a question paper or alternatively may be provided with test items that should be consolidated into a question paper and the accompanying marking guideline.

D.1.2.1.2 Chief Examiner

The Chief Examiner is the person who manages the process of setting national or provincial question papers and takes responsibility for the quality and standard of the question paper. The Chief Examiner is also responsible for coordination and management of the panel and liaises with the internal moderator as well as taking final responsibility for the question paper prior to its submission for internal moderation.

D.1.2.1.3 Internal Moderator

The Internal Moderator is the person who is responsible for ensuring that the national or provincial question paper/test complies with the standards and requirements as set out in the Curriculum and Assessment Policy Statements and the Examination Guidelines in the case of the National Senior Certificate/Senior Certificate or the test framework in the case of the GEC or the Systemic Evaluation.

D.1.2.1.4 Editor

The editor quality assures the question paper/test/test item/marketing guideline and ensures that there is no grammatical, spelling, layout and/or other language errors. The editor also ensures that the language in the question paper/test/test item is of the appropriate standard and is accessible to all candidates/learners that the question paper/test/test item is targeting.

D.1.2.1.5 Pre-test Taker

The Pre-test Taker writes the question paper/test under controlled conditions and thereafter completes a report on the evaluation of the question paper which serves as the basis for the discussion with the examiners/test developers to refine the question paper/test.

D.1.2.1.6 Translator

The translator is responsible for changing the language of the question paper/test/test item/marketing guideline from one language to another, as required.

D.1.2.1.7 Versioner

The Versioner translates the question paper and in addition he/she adapts the question(s) to suit the context of the language without altering the essence of the question(s).

D.1.2.1.8 Adaptor

An Adaptor adapts the original question paper/test/test item to make it accessible for the partially blind/blind and the deaf learner.

Adaptation of a question paper requires special skill, training and expertise. For example, adaptation for the blind is very technical. In the main, visuals and aspects requiring visual literacy are modified or replaced. Adaptation for the deaf involves rephrasing and reconstruction of sentences to ensure simplification and alignment to sign language.

D.1.2.1.9 Interpreter

The interpreter serves to interpret between panel members and in other contexts where sign language and a spoken language are used. The interpreter must provide complete and accurate information both to the deaf and hearing examiners, test developers, internal moderators, markers and teachers during the setting, moderation, marking and marker training in the setting and marking of the South African Sign Language (SASL) question papers/tests. An interpreter must understand the subject matter so he or she can translate accurately what is being spoken into sign language.

D.1.2.1.10 Reviewer

A reviewer is used to independently evaluate a question paper/test after it has been internally moderated and externally moderated. The reviewer evaluates whether the question paper/test complies with the standards and requirements as set out in the Curriculum and Assessment Policy Statements and the Examination Guidelines in the case of the National Senior Certificate/Senior Certificate or the test framework in the case of the GEC or the Systemic Evaluation.

D.1.2.2. Administration of the Examination/Assessment

D.1.2.2.1 Chief Invigilator

The Chief Invigilator is the school principal or any other person appointed by the District Director who takes full and final responsibility for the conduct and management of the May/June or October/November examinations and the GEC external assessments that are administered at the examination centre. The Chief Invigilator will be appointed, in writing, by the District Director.

D.1.2.2.2 Invigilator

The Invigilator is appointed to assist the Chief Invigilator with the administration of the examination or the external assessment relating to the NSC, SC and the GEC. His/her responsibility relates to ensuring that the examination/external assessment is conducted in accordance with the rules and procedures relating to examinations and external assessment.

D.1.2.2.3 Irregularity Officer

The Irregularity Officer is appointed by the Head of Examinations at the provincial head office to manage all irregularities that are identified at the examination centre or at the marking centre.

D.1.2.2.4 Reader

A reader is appointed by the Head of Examinations to read the whole question paper or any part of the question paper to the candidate when the candidate has a temporary or permanent disability relating to reading. Questions or part questions may be re-read at the request of the candidate.

D.1.2.2.5 Scribe

A scribe is appointed by the Head of Examinations to write the learner's responses to the questions on the question paper when the candidate has suffered a temporary or permanent disability relating to writing.

D.1.2.3 Monitoring of Examinations and School-based Assessment.

D.1.2.3.1 Monitor

A monitor is appointed specifically to monitor examination processes, including School-based Assessment (SBA). A monitor will ensure compliance to the Examination and SBA policy and Regulations and will accomplish this by monitoring the administration of the public examinations from the commencement of the cycle to the conclusion of the cycle. The monitor will also be responsible for the monitoring of the implementation of SBA, which includes Orals and Practical Assessment Tasks (PATs). The monitor will collect data based on on-site observations and desk-top evaluations, record and analyse the findings and provide feedback on all examination processes and SBA, including Orals and Practical Assessment Tasks (PAT).

D.1.2.3.2 Chief Monitor

A Chief Monitor will be responsible for the co-ordination of monitoring in a specific province. The Chief Monitor will be responsible for the development of the monitoring plan for the province, oversee the monitoring in that province and take responsibility for the feedback on the monitoring findings from the commencement of the cycle to the conclusion of the cycle in all examination processes.

D.1.2.4 Marking of Examination Scripts

D.1.2.4.1 Marker

A marker is appointed to mark an entire examination/test answer script or a specific question or group of questions as specified by the chief marker. A marker is provided with a marking guideline and he/she has to comply with the marking guideline.

D.1.2.4.2 Senior Marker

A Senior Marker takes responsibility for the moderation of the marking of specific questions or a group of questions marked by a group of markers who are allocated to him/her. The Senior Marker's responsibility is to ensure that the markers under his/her oversight comply with the marking guideline.

D.1.2.4.3 Deputy Chief Marker

Deputy Chief Marker assists the chief marker in the marking process and takes responsibility for the moderation of the scripts assigned to a group of senior markers and their teams at the marking centre. The Deputy Chief Marker conducts whole script moderation.

D.1.2.4.4 Chief Marker

The Chief Marker is responsible for the management and the quality of marking of the external examination scripts in a particular subject and paper.

D.1.2.4.5 Internal Moderator (Marking).

The Internal Moderator is responsible for ensuring that the standard and quality of marking comply with the set marking standards and requirements. He/She exercises oversight of the marking standards in a particular subject/paper at the marking centre.

D.1.2.4.6 Analytical Moderator (Marking)

An Analytical Moderator is a subject specialist who analyses the learner responses in the answer script and the statistical data relating to learner performance and compiles an analytical/diagnostic report.

D.1.2.4.7 Marking Centre Manager

The Marking Centre Manager is responsible for the organisation and management of the entire marking centre during the marking period.

D.1.2.4.8 Deputy Marking Centre Manager

The Deputy Marking Centre Manager provides assistance to the Marking Centre Manager in the management and organisation of the marking centre. A maximum of two Deputy Marking Centre Managers may be appointed at a marking centre. The one would be responsible for all administrative responsibilities, which includes the management of scripts, the payment of claims and the checking of the scripts after they have been marked, etc. The second Deputy Centre Manager will be responsible for the management of the venue, the catering and the security.

D.1.2.4.9 Examination Assistant

Examination Assistant provides logistic, checking and administrative support for operations at the marking centre.

D.1.2.5 Moderation of School-based Assessment (SBA) (which includes Orals and Practicals)**D.1.2.5.1 SBA Moderator**

An SBA moderator is responsible for the quality assurance of SBA, which includes Orals and Practical Assessment Tasks (PATs). An SBA moderator will be requested to conduct an audit of the SBA systems at provincial and district levels, moderation of SBA tasks and the learner evidence and provide feedback on the findings with clear recommendations.

D.1.2.5.2 Chief SBA Moderator

A Chief SBA Moderator, will be responsible for the co-ordination of the quality assurance in a specific subject at a national or provincial level. The Chief SBA moderator will be responsible for the development of the quality assurance plan for the subject, oversee the implementation of the quality assurance of SBA in that subject and take responsibility for the feedback on the quality assurance findings.

D.1.2.3 Persons with specialised expertise to perform functions related to Public Examinations and National Assessment.

In addition to the categories of persons listed above, there may be a need to appoint persons with specialised expertise to perform functions relating to Public Examination and National Assessment on a short-term basis. These functions which demand professional skills related to the following:

- (a) fairness review of question papers, which relates to issues relating to language and bias;
- (b) external review and scrutiny of question papers;
- (c) post-test analysis of question papers;
- (d) quality assure examination question papers
- (e) analysis of examination and SBA data and report writing;
- (f) editing of examination and assessment reports and other related documents;
- (g) audit of examination/assessment processes or systems;
- (h) conducting investigations, hearings, serve as evidence leader or presiding officer with regard to examination irregularities; and
- (i) assist with the development of regulations, policy, guidelines, manuals and any other supporting document.

D2. REMUNERATION FOR THE PERFORMANCE OF EXAMINATION RELATED DUTIES**Amendment of Paragraph 2 of the Policy****2. Paragraph 2 is hereby amended by-**

(a) the substitution for sub-paragraph (2)(a) of the following sub-paragraph-

D.2.1 In order to calculate a person's remuneration for examination related work, the tariff, as it is applied on the day that the work should have been completed, must be used.

D.2.2 For each of the following categories of examination-related work the corresponding remuneration tariff, expressed in terms of the applicable standard tariff, shall apply at the relevant level, as listed in the Tariffs for Examination Related Work for National Senior Certificate, Senior Certificate and National Assessment from 1 July of the relevant financial year, shall apply:

D.2.2.1 Setting of National question paper/test and accompanying [memorandum] marking guideline for National Senior Certificate(NSC), Senior Certificate (SC) and National Assessment (NA)

D.2.2.1.1. Examiner

[8] 13.07 x (standard tariff) x (duration of question papers in hours)

Provided that where use is made of more than one examiner for a question paper, at most the equivalent of two examiners may be compensated, at a provincial level. In the case of an examination paper set at national level, at most the equivalent of four examiners may be compensated. [Para. 2.2(a) amended by G.N. No. 1400 of 2001 published in *Government Gazette* No. 22961 dated 19 December 2001.]

D.2.2.1.2 Chief Examiner

14.25 x (standard tariff) x (duration of question papers in hours)

D.2.2.2 Setting of provincial question paper/test and accompanying [memorandum] marking guideline for National Senior Certificate) and National Assessment (NA)

The examiner, chief examiner and internal moderator is paid (75%) of the National tariffs.

D.2.2.2.1 Examiner

9.8 x (Standard Tariff) x (duration of question papers in hours)

D.2.2.2.2 Chief Examiner

10.7 x Standard Tariff x duration of question papers in hours

D.2.2.3. Moderating of National question paper/test and accompanying [memorandum] marking guideline for National Senior Certificate) and National Assessment (NA)

D.2.2.3.1. Internal Moderator

[1,8] 15.81 x (standard tariff) x (duration of question papers in hours)

D. 2.2.4. Moderating of provincial question paper/test and accompanying [memorandum] marking guideline for National Senior Certificate) and National Assessment (NA)

D.2.2.4.1 Internal Moderator

11.86 x standard tariff x duration of question papers in hours

D. 2.2.5. Additional work relating to question papers/tests

D.2.2.5.1 Translation of question paper/test and accompanying [memorandum] marking guideline

[1.0] 0.0039 x (standard tariff [x duration of question paper in hours] for level 1) per word

For both National and Provincial papers

D.2.2.5.2. Adaptation of question papers/tests (Both provincial and national question Papers/Tests)

0.0039 x (standard tariff for level 1) per word

D.2.2.5.3. Versioning of question paper/tests (Both provincial and national question papers/tests)

0.0041 x (standard tariff for level 1) per word

D.2.2.5.4 Editing of question papers (Both provincial and national question papers/tests)

0.35 x (Standard tariff for level 1 per word) (all levels)

D.2.2.5.5. Reviewing of question papers/tests (National question papers/tests)

The tariff for the review of National Question Papers (NSC/NA) is 30% of the Internal Moderation tariff of National Question Papers

4.7 x (standard tariff) x (duration of question papers in hours)

D.2.2.5.6. Reviewing of Question Papers/tests (Provincial Question Papers/tests)

The tariff for the review of Provincial Question Papers/tests (NSC/NA) is 30% of the Internal Moderation tariff of Provincial Question Papers

3.6. x (standard tariff) x (duration of question papers in hours)

D.2.2.5.7. Pre-Test TakerNational Question Paper/Tests

4.7 x (standard tariff) x (duration of question papers in hours)

Provincial Question Papers/Tests

3.6. x (standard tariff) x (duration of question papers in hours)

D.2.2.6. Marking and control marking of examination scripts

The following hourly rates apply in respect of marking and control marking of examination scripts, provided that in the opinion of the HoD, a satisfactory pace of marking and control marking is maintained:

Duties performed as a:

Marker:	0,6 x (standard tariff)
Senior Marker:	0,65 x (standard tariff)
Deputy Chief Marker:	0,70 x (standard tariff)
Chief Marker:	0,75 x (standard tariff)

D.2.2.7 Internal Moderation of Marking**D.2.2.7.1 Internal Moderator (Marking)**

0.75 x (standard tariff) per hour

D.2.2.7.2 Analytical Moderator

0.75 x (standard tariff) per hour

D.2.2.8 Remarking of examination scripts on appeal.

0,1 x (standard tariff) x (duration of question paper in hours) x (number of scripts remarked for the question paper).

D.2.2.9. Investigation of Examination irregularities**D.2.2.9.1. Irregularity Officer**

0.75 x (standard tariff) per hour

D.2.2.10. Moderation of School Based Assessment (SBA) which includes Practical Assessment Tasks and Oral Assessment**D.2.2.10.1 SBA Moderator**

0,6 x (standard tariff) x (number of hours spent on moderation) with a minimum remuneration per day based on 3 hours' examining.

D.2.2.10.2 Chief SBA Moderator

0,65 x (standard tariff) x (number of hours spent on examining) with a minimum remuneration per day based on 3 hours' examining.

D.2.2.11. Monitoring of Examinations and School Based Assessment

D.2.2.11.1 Monitor

0.59 x (standard tariff for level II) per hour

D.2.2.11.2. Chief Monitor

0.64 x (standard tariff for level II) per hour

D.2.2.12. Administration of Examinations and Assessment

D.2.2.12.1 Chief Invigilator

[0,9] 0,54 x (standard tariff for Level 1) per hour in terms of the duration of the question paper [for the invigilator per examination session irrespective of the duration,] [and]

D.2.2.12.2 Invigilator

[0,6] 0,36 x (standard tariff for Level 1) per hour in terms of the duration of the question paper. [for the assistant invigilator per examination session irrespective of the duration.]

Note: No remuneration will apply to persons conducting invigilation at their own institutions or in situations that are regarded as being part of their official duties.

D.2.2.12.3 Scribes and Readers

0,59 x (standard tariff) per hour

D.2.2.12.4. Interpreters

0.59 x (standard tariff) per hour

D.2.2.13 Marking Centre Management

D.2.2.13.1 Marking centre manager

0,95 x (standard tariff [for Level II]) per hour. A maximum of twelve hours per day may be claimed for each day during which the marking is in process at the marking centre.

D.2.2.13.2 Deputy marking centre manager

0,72 x (standard tariff [for Level II]) per hour. A maximum of twelve hours per day may be claimed for each day during which the marking is in process at the marking centre.

D.2.2.13.3 Examination assistant

0,2 x (standard tariff [for Level II]) per hour.

D.2.2.14. Persons with specialised expertise to perform functions related to Public Examinations and National Assessment.

The functions to be performed include the following:

- a) fairness review of question papers, which relates to issues relating to language and bias;
- b) external review and scrutiny of question papers;
- c) post-test analysis of question papers;
- d) quality assure examination question papers
- e) analysis of examination and SBA data and report writing;
- f) editing of examination and assessment reports and other related documents;
- g) audit of examination/assessment processes or systems;
- h) conducting investigations, hearings, serve as evidence leader or presiding officer with regard to examination irregularities; and
- i) assist with the development of regulations, policy, guidelines, manuals and any other supporting document.

0.59 x (standard tariff) per hour

D.3. COMPENSATION FOR TRAVEL AND SUBSISTENCE EXPENSES**Amendment of Paragraph 3 of the Policy****3. Paragraph 3 is hereby amended by-**

- “(3) The following measures regarding the compensation for travel and subsistence expenses apply in respect of duties performed at a marking centre:

D 3.1. Travel Allowance

- (a) the substitution for sub-paragraph (3.1.) of the following sub-paragraph-

D.3.1.1. A travel allowance is payable to all applicable persons who either make use of their private vehicles or of public transport and is calculated in terms of the actual number of kilometres travelled between their home and the marking centre.

D.3.1.2. The maximum distance for which a person may claim who travels daily between his/her home and the marking centre, is [75] 100 km per trip [150] 200 km per return journey.

D.3.1.3. Where accommodation is provided at the marking centre, a person may only claim for one return trip between his/her home and the marking centre unless otherwise approved by the employer.

D.3.1.4. Persons who make use of public transport may claim their actual expenses (subject to the approval of the relevant National/Provincial Education department) and may be required to provide proof of such expenses.

D.3.1.5. Persons who make use of their private vehicles may be compensated [at the following rate, [irrespective] according to the engine capacity of such vehicle. Such persons may not claim for passengers.

Travel allowance: 0,01 x (standard tariff for Level II), rounded to the nearest 1 cent per kilometre.

D.3.1.6. Persons who travel as Passengers in a car to the marking centre may claim only the tariff for public transport.

D.3.2 Subsistence allowance

D. 3.2.1 Persons who make use of accommodation at marking centre

Note: Such a person may only claim for one return journey between his/her home and the marking centre and may not claim for any travelling between the place of accommodation and the marking centre.

D 3.2.1.1 If accommodation and meals are provided at no cost to the employee

No allowance.

D.3.2.1.2 If only accommodation is provided by the Department at no cost to the employee.

Meal allowance: 0,5 x (standard tariff for level II) per day for at least 5 hours' work.

D.3.2.1.3 If no accommodation is provided by the Department,

The following accommodation allowance may be paid to a person who, with the approval of the department, makes use of private accommodation near the marking centre:

0,8 x (standard tariff for level II) per night stayed at such private accommodation.

A meal allowance as in paragraph D.3.2.1.2 may also be applicable.

D.3.2.2. Persons who travel daily between their homes and the marking centre

D.3.2.2.1 If at least lunch is provided

No meal allowance.

D.3.2.2.2 If no meals are provided

Meal allowance: 0,3 x (standard tariff for Level II) per day of at least 5 hours work."

D4. CRITERIA FOR THE APPOINTMENT OF EDUCATORS FOR EXAMINATION RELATED WORK

4. Paragraph D.4. is hereby amended by-

(a) the substitution for sub-paragraph (D.4.1) of the following sub-paragraph-

D.4.1 In selecting and appointing persons to the various examination-related positions, cognisance must be taken of the general need to build capacity among serving educators in order to ensure that there is a fair spread and representation in respect of districts, race and gender. [also taking into account the special needs of educators in rural areas]. Fifteen percent (15%) of the markers at all levels must be novice markers. In cases where a PED cannot make the 15% requirement, this must be approved by the Head of Department (HoD), based on a detailed motivation provided. [This should be pursued by reserving a certain minimum number of appointments for this purpose. The number of appointments that needs to be reserved for this purpose should correspond with the [department's] provincial and national identified needs in this regard.]

(b) the substitution for sub-paragraph 4.2 of the following sub-paragraph-

D.4.2 In addition to the general criterion referred to in paragraph D.4.1, the following criteria shall apply with regard to the selection and appointment of examiners, internal moderators, (for the setting and moderation of nationally and provincially set examination question papers and tests and accompanying [memoranda] marking guidelines) [and internal moderators], translators, adaptors and versioners (for the translation, adaptation and versioning of nationally and provincially set examination question papers and tests, and accompanying marking guideline)

D.4.2.1 Advertisements should be included in a [departmental] National and/or Provincial circular [or provincial gazette as well as] or in the National and/or Provincial [local] press.

D.4.2.2 A selection panel shall be appointed by the [Education] Director General of the Department of Basic Education or the relevant Head of Department (HoD) of the Provincial Education Department, depending on where the appointment needs to be made. Teacher unions that are members of the Education Labour Relations Council (ELRC) shall be allowed observer status on such a panel.

D.4.2.3 The following criteria will apply in respect of the selection and appointment of candidates:

The appointee must:

D.4.2.3.1 Have at least a recognised three-year post Grade 12 qualification, which must include the subject concerned at second or third year level or in the case of new subjects, a qualification in a related subject will be considered.

D.4.2.3.2 Have at least three years' experience as an educator in the particular subject [or a related area] and at least two years teaching [or other curriculum-related] experience within the last 5 years at the Grade 12 level, in the particular subject. In the case of National Assessment, the same criterion applies, except that the teaching experience will be at the appropriate level, in the particular subject. In the case of the implementation of new subjects, Grade 10 and 11 experience will be recognised in the case of the NSC and lower grades in the case of National Assessment. In the case of Subject Advisors consideration will be given to Subject Advisors supporting the relevant band for at least 3 years. The experience to be considered could include teaching and/or support provided in the relevant band

[(iv)have experience as a marker for at least two years in the particular subject.]

[Para. 4.2(c)(ii) amended by G.N. No. 1400 of 2001 published in *Government Gazette* No. 22961 dated 19 December 2001.]

D.4.2.4 In addition to the above criteria, preference should be given to serving school-based educators.

(c) the substitution for sub-paragraph 4.3 of the following sub-paragraph-

D.4.3 In respect of an examination/test paper where no suitable candidate can be recruited with the set minimum qualifications or experience, the Director General or Head of Department (HoD) concerned may approve the appointment of a suitable candidate with other appropriate post school qualifications or with less than the required experience after consultation in this regard with the relevant teacher unions. The final decision with regard to the appointment of examiners, and internal moderators rests with the Director-General: Basic Education in respect of nationally set examination question papers and the Head of Department (HoD) in respect of provincially set examination question papers.

(d) the substitution for sub-paragraph 4.4 of the following sub-paragraph-

D.4.4 The criteria to qualify for appointment as markers, **[including]** senior markers, deputy chief markers, **[and]** chief markers and Internal Moderators should, in addition to those referred to in sub-paragraph D.4.1, include the following general requirements:

D.4.4.1 **[Appropriate teaching experience, including teaching experience at the appropriate level, in the subject concerned].** At least a three-year post Grade 12 qualification, which must include the subject to be marked at second or third year level and at least two year teaching experience obtained during the last five years in the subject to be marked.

D.4.4.2 Language competency

D.4.4.3 In addition to the above criteria, preference should be given to serving educators who are teaching the subject **[concerned]** in Grade 12 or at the appropriate grade in the case of National Assessment. The provision in paragraph 4.3 for the relaxation of requirements in respect of qualifications and experience, also applies in respect of these appointments.

(e) the substitution for sub-paragraph 4.5 of the following sub-paragraph-

D.4.5 The selection of markers for a specific examination/test paper should be carried out by a panel comprising of:

D.4.5.1 Chief **[examiner]** Marker;

D.4.5.2 Internal Moderator;

D.4.5.3 Relevant departmental officials; and

D.4.5.4 Teacher unions (As observers).”.

(f) the insertion of sub-paragraph 4.6, following sub-paragraph 4.5-

D.4.6 The following additional criteria must also be complied with: -

D.4.6.1 the ratio of senior markers to markers and deputy chief markers to senior markers is 1:5;

(g) the insertion of sub-paragraph 4.7, following sub-paragraph 4.6-

D.4.7 All markers, senior markers, deputy chief markers, chief markers and internal moderators as contemplated in sub-paragraphs D.4.4, must sign a declaration form, should they have a child in Grade12 in the year of the May/June or October/November examination.”.

*PERSONNEL ADMINISTRATIVE MEASURES (PAM)***CHAPTER E: AWARDS AND BENEFITS**

- E.1. DEPARTMENT-SPECIFIC BENEFITS AND AWARDS**
- E.2. MEASURES PRESCRIBED BY LEGISLATION NOT ADMINISTERED BY THE MINISTER OF BASIC EDUCATION AND SERVICE BENEFITS WHICH APPLY TO ALL EMPLOYEES OF THE STATE**
- E.3. RETRENCHMENT PACKAGE**
- E.4. EMPLOYEE-INITIATED SEVERANCE PACKAGE (EISP)**

ANNEXURE**Annexure E.1 Allowances and subsidies (amounts)****E.1 DEPARTMENT-SPECIFIC BENEFITS AND AWARDS****E.1.1 Awards for Achievement**

The purpose is to provide for the granting of non-pensionable awards for achievement to educators other than by means of the normal performance and merit systems and to supplement remuneration on a non-pensionable basis in cases where specific difficulties are experienced, which awards and supplements will be restricted to the particular financial year within which they are made. The purpose is, therefore, to address short-term needs/problems that cannot be met by means of general staff systems and measures.

E.1.1.1 Powers

E.1.1.1.1 The HoD may, on the advice of a committee, grant a department-specific award to an educator.

E.1.1.1.2 The advisory committee is designated by the HoD and must include at least two members of the management corps.

E.1.1.2 Conditions

E.1.1.2.1 The expenditure relating to the awards is restricted to the financial year concerned and the awards cannot, therefore, place a financial obligation on the following financial year.

E.1.1.2.2 The total amount expended by a department of education on department-specific awards may not exceed 0,537% of the total salary account of the education department concerned as at 1 April of the relevant financial year. This percentage may be zero, in which case no awards have been made.

E.1.1.2.3 The size of the award must relate to the need identified.

E.1.1.2.4 The award or awards made to an educator may not, in total, exceed 25% of the pensionable salary notch of the educator concerned on 1 April of the relevant financial year.

E.1.1.2.5 The award must, in the opinion of the HoD, be in the interest of the particular education department or the state.

PERSONNEL ADMINISTRATIVE MEASURES (PAM)

E.1.1.2.6 In the case of a function shift suitable arrangements must be made between the education departments concerned for the purpose of transferring a portion of the amount mentioned in paragraph E.1.1.2.2 together with the function.

E. 1.1.3 **Monitoring**

With a view to monitoring the success of the awards, provincial departments of education may be requested to furnish DBE with particulars regarding the utilisation of these awards.

E.1.2 Incentives to Educators (*Government Gazette No. 30678, dated 18 January 2008*)

E.1.2.1 Measures relevant to the payment of incentives to educators

E.1.2.1.1 The purpose of these measures is to provide for the payment of incentives to academically and/or professionally qualified educators who qualify for incentives by meeting certain prescribed criteria:

- (a) This incentive scheme is limited to academically and/or professionally qualified (REQV 13 or higher) educators employed in schools as defined in the EEA. It excludes any educator subjected to another agreement or directive, rehabilitation posting, suspension or absent without pay.
- (b) A post or posts will be identified to be eligible for incentives at a school in accordance with criteria set out in this agreement.
- (c) An educator who meets the criteria of the post eligible for incentives will be required to enter into an "incentive contract" with the provincial department of education. The "incentive contract" will indicate the amount and kind of the incentive, the period for which the incentive is payable, specific conditions such as satisfactory performance, being available at school during working hours, being regular and punctual, being available to the school outside school hours for school functions as well as parent meetings.
- (a) Educators vacating the post permanently or temporarily (study or vacation leave) for longer than one month will cease to receive the incentive attached to the post for the period the post is vacated.
- (e) A post will be eligible for incentives for a fixed duration (three years). If the post is re-eligible for incentives, then the incumbent providing he/she meets the criteria will be considered for incentives.
- (f) An educator not qualifying, in terms of the criteria, may occupy a post eligible for incentives. This will not create any right for an incentive to be paid to such an educator.
- (g) In addition to any other specific criteria, terms and conditions, educators who are receiving the incentive and do not perform at least at the level of satisfactory, in terms of the Quality Management System, shall be given one term's notice of termination of the incentive. The incentive may be reinstated when the educator's performance is at the level of satisfactory.

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E.1.2.2 There will be two categories of schools where incentives will be applicable:

E.1.2.2.1 Remote schools

- (a) The selection of schools where all the posts would be eligible for incentives would be determined in the following order:
- (i) The remoteness of the school. This could be defined as the distance that the school is situated from the nearest town. Such a town should have all the basic facilities and services that a teacher would want to have access to, such as proper housing, banks, post office, shops, police station and recreational facilities. The HoD should identify towns in or near the province that comply with these requirements. By means of GPS technology the distance by road that each school is from any of the identified towns could be determined. This would enable the ranking of schools based on these distances.
 - (ii) Poverty. All schools are already ranked in terms of poverty criteria and divided into quintiles, quintile 1 being the 20% poorest schools and quintile 2 the next poorest 20%.
 - (iii) No-fee schools: All schools categorized as no-fee schools shall be prioritized.
 - (iv) Combinations of other factors that are impacting negatively on the recruitment of teachers and which, through practical experience, have proved to have a negative impact on the suitable filling of posts.

E.1.2.2.2 Other Schools

- (a) Some of the posts might be eligible for an incentive at schools that meet the following criteria:
- (i) Situated in difficult urban zones of the country (hard-to-teach schools).
 - (ii) Experiencing a chronic shortage of educators in certain subjects/learning areas, such as mathematics, sciences, ICT, some languages identified by the provincial departments of education.
 - (iii) Where a principal or SGB has requested that some posts at the school be eligible for an incentive. In such case the principal or SGB must be able to prove that it had not been possible to recruit a suitably qualified educator through the normal recruitment process.
- (b) The minimum amount of the incentive will be 10% of the minimum salary notch of PL1 REQV 14. An educator may qualify for more than one type of incentive, for example: remote, plus scarce subjects, plus difficult conditions.
- (i) The amount that the educator receives as an incentive may be increased by offering him/her more than one type of incentive or by adding levels ("steps") to the percentage applicable to the same type of incentive, for example (X+1)%; (X+3)% etc.

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- (ii) The percentage equal to or above 10% can differ from one type of incentive to another.
- (c) The HoD must, by 30 September of the year before that of implementation, provide to the DG an indication of the –
 - (i) Type and number of posts that would be eligible for the incentive in terms of paragraphs E.1.2.2.1 and E.1.2.2.2.
 - (ii) Percentage applicable to each type of incentive.
 - (iii) Levels or “steps” added to the percentage applicable to each type of incentive post, and the criteria for qualifying for the various levels or “steps”.
 - (iv) The number of incentive posts that were created and to be paid out in kind and a description thereof, for example provision of free housing, provision of subsidized vehicle, overseas study visits or study visits.
- E.1.2.3 The HoD must, by 30 June of each year, provide to the Director-General a report of the incentive posts filled (by type and level and the amount spent) in the previous financial year.
- E.1.2.4 The provincial department of education must pay the incentive in the form and to the extent of a non-pensionable allowance, in cash or in kind.
- E.1.2.5 Whilst this policy is to be implemented by the HoDs, it is the prerogative of the Minister to monitor implementation and to progressively intervene in situations where HoDs do not implement the provisions of the policy and ensure spending in line with the allocations for Teacher Incentives (R 500 Million) which have already been transferred to provincial departments of education.
- E.1.2.6 The approximate breakdown for the allocations for teacher incentives to provincial departments of education relates to the following:

Provincial Education Department	Allocation 000'000 for 2007/2008	No. of Incentivized Posts @ 10% of SL 7.1 (R107 007)
Eastern Cape	R 84.55	7901
Free State	R 28.55	2668
Gauteng	R 74.05	6920
KwaZulu Natal	R 114.55	10705
Limpopo	R 70.06	6598
Mpumalanga	R 43.05	4023
Northern Cape	R 11.05	1033
North West	R 32.55	3042
Western Cape	R 41.05	3836
TOTAL	R 500 m	46 726

- E.1.2.6.1 The allocation will be adjusted every year based on the annual adjustment rate.
- E.1.2.6.2 The number of projected incentivised posts may vary, by not more than 10% as a result of paragraph E.1.2.6.

PERSONNEL ADMINISTRATIVE MEASURES (PAM)

E.1.2.6.3 The Minister could, based on an analysis of reports received by the DG on the implementation and the fact that all allocations have been transferred to provincial departments of education, declare on an annual basis a number of posts as incentive posts in line with the policy.

E.2 MEASURES PRESCRIBED BY LEGISLATION NOT ADMINISTERED BY THE MINISTER OF BASIC EDUCATION AND SERVICE BENEFITS WHICH APPLY TO ALL EMPLOYEES OF THE STATE

E.2.1 Application of the Compensation for Occupational Injuries and Diseases Act, 1993 (Act No 130 of 1993)

E.2.2 Government Employees Pension Fund Law, 1996 (Proclamation 21 of 1996)

E.2.3 The measures in respect of, inter alia, the following matters apply to educators, mutatis mutandis, as they apply to other employees of the state:

E.2.3.1 **Local subsistence and camping allowance** (*PSCBC Resolution 3 of 1999*)

E.2.3.2 **Housing allowance scheme** (*PSCBC Resolution 2 of 2004, Government Gazette No 27657, dated 6 June 2005 and the Determination on Housing, issued by the Minister of Public Service and Administration*)

Refer to Annexure E.1 for the current housing allowance amount.

E.2.3.3 **Medical assistance for educators and former educators** (*PSCBC Resolution 1 of 2006 and the Determination on Medical Assistance in the Public Service, issued by the Minister of Public Service and Administration*)

Refer to Annexure E.1 for the current medical aid subsidies.

E.2.3.4 **Recognition of long service** (*PSCBC Resolution 1 of 2012 and Determination on the long service recognition in the public service, issued by the Minister of Public Service and Administration*)

Refer to Annexure E1 for the current cash amount payable to qualifying educators.

E.2.3.5 **Service bonus** (*PSCBC Resolution 3 of 1999, PSCBC Resolution 7 of 2000 and the DPSA Financial Manual (for purposes of the calculations and application of allowances and benefits, August 2010)*)

E.2.3.6 **Resettlement** (*Regulation 90 of the Regulations regarding the terms and conditions of employment of educators, PSCBC Resolution 3 of 1999 and the DPSA Financial Manual (for purposes of the calculations and application of allowances and benefits, August 2010)*)

E.2.3.6.1 Upon the transfer, appointment or termination of service of an educator in terms of the EEA or his/her death, the educator or his/her estate will be compensated by the employer for the reasonable resettlement expenditure actually and necessarily incurred as a result thereof within the framework of PSCBC Resolution 3 of 1999. (*Regulation 90 (1) of the regulations regarding the terms and conditions of employment of educators*)

PERSONNEL ADMINISTRATIVE MEASURES (PAM)

E.2.3.6.2 The HoD within the context of existing provisions, determines policy regarding compensation for resettlement expenditure.

Refer to Annexure E.1 for the cash amount payable for new books, uniforms and related costs.

Note: Official traveling and transport are dealt with in terms of provincial policy.

E.3 RETRENCHMENT PACKAGE

E.3.1 The following retirement benefits will apply to an educator who, because of rationalisation, has been retrenched by the department in which he/she is appointed, before reaching retirement age:

E.3.1.1 Payment of pension benefits in terms of the Rules of the Government Employees Pension Fund.

E.3.1.2 Payment of leave credit due to the educator, calculated in terms of paragraph H.4.4 en H.4.5 of Chapter H.

E.3.1.3 Payment of a service bonus on a pro rata basis. Refer to paragraph E.2.3.5.

E.3.1.4 Continued payment of the monthly housing allowance for a maximum period of six months after termination of service. Those educators who received this benefit and who are re-employed by any government department within the six months' period, will not qualify for a housing allowance for the remaining period of the six months.

E.3.1.5 Continued occupation of official quarters, where possible, for a period of three months after termination of service.

E.3.1.6 Medical assistance in terms of paragraph E.2.3.3.

E.3.1.7 The cancellation of any service commitments that the educator may have on termination of service.

E.3.1.8 In cases where the educator enjoys the benefit of a motor vehicle scheme, the rules of the scheme must be applied.

E.3.1.9 Application of the rules in respect of resettlement costs. Refer to paragraph E.2.3.6.

E.3.1.10 The employer shall, if he/she intends to discharge an educator in terms of section 11(1)(b) of the EEA, give the educator three calendar months' written notice (*Regulation 16 of the Regulation regarding the terms and conditions of employment of educators*).

E.4 EMPLOYEE-INITIATED SEVERANCE PACKAGE (EISP) (Government Gazette No. 29056, dated 21 July 2006 and the Determination on the introduction of an employee-initiated severance package for the public service (revised), January 2006)

The EISP came into effect on 1 January 2006. Refer to above-mentioned Determination.

ANNEXURE E.1

ALLOWANCES AND SUBSIDIES (AMOUNTS)

Medical assistance				
GEMS				
Category	Monthly subsidy (with effect 1 March 2011)			
Single member	R720.00			
Member with one dependent	R1 440.00			
Member with 2 dependents	R1 880.00			
Member with 3 dependents	R2 320.00			
Member with 4+ dependents	R2 760.00			
Open medical scheme	R1 014.00			
Housing allowance				
R900.00 per month (with effect 1 July 2012)				
Recognition of long service (with effect 31 July 2012)		31 July 2012	1 April 2013	1 April 2014
	20 years' continued service	R7 500.00	R7 920.00	R8 371.00
	30 years' continued service	R15 000.00	R15 840.00	R16 743.00
	40 years' continued service	R20 000.00	R21 120.00	R22 324.00
Resettlement expenditure: new school books, uniforms and related costs				
R1098 per child (with effect 1 April 2013)				

Note: These amounts are subject to adjustment from time to time.

CHAPTER F: TIME OFF AND SECONDMENT

- F.1 INTRODUCTION**
- F.2 GENERAL**
- F.3 TIME OFF**
- F.4 SECONDMENT TO TRADE UNIONS**
- F.5 SECONDMENT OF SHOP STEWARDS**

ANNEXURE

Annexure F.1 SS distribution – current and expired

F.1 INTRODUCTION

F.1.1 The measures contained in this chapter are based on the following principles:

F.1.1.1 The acknowledgement of labour rights entrenched in the Constitution of the Republic of South Africa, the LRA, and the Constitution of the ELRC, which seeks to promote labour peace.

F.1.1.2 That an educator's role in the education process is dynamic and developmental, and therefore requires the active participation of educators at school, provincial and national level.

F.1.1.3 That the amount of time off and the frequency thereof should at all times be reasonable and fair.

F.1.1.4 That arrangements for time off should consider:

F.1.1.4.1 The need for the process of teaching and learning to be uninterrupted.

F.1.1.4.2 The importance of high productivity levels.

F.1.1.4.3 Efficiency and effectiveness in services rendered to the general public.

F.1.1.4.4 The need for order in the education system.

F.1.1.4.5 The constitutional rights of the child.

F.2 GENERAL

F.2.1 When requiring time off:

F.2.1.1 A reasonable period of notice must be given to the responsible person designated by the employer for time off to attend meetings, training courses, and other agreed to activities.

F.2.1.2 In respect of urgent meetings arising from the collective bargaining process, the trade union should advise the responsible person designated by the employer timeously of such urgent meetings.

- F.2.1.3 When requesting time off for workplace and other such like meetings, every effort should be made to hold them before or after official school hours, or during lunch breaks.
- F.2.1.4 An efficient record system must be kept in respect of time off allowed for all entitled educators.
- F.2.1.5 Management must be informed timeously of any resignation of members/ representatives.
- F.2.2 Applications for time off must be considered on its merits and the principle of reasonableness and fairness must apply.
- F.2.3 It is the responsibility of managers identified by the provincial departments of education to keep separate registers of trade union members and representatives in good standing, as well as details of time off allowed with full pay and without pay, and to forward such records annually, but before 31 December, to both the trade unions concerned and the responsible personnel offices.

F.3 TIME OFF

F.3.1 Time Off for Collective Bargaining Purposes

F.3.1.1 Entitlement

Duly elected, identified trade union representatives are allowed time off, including during school hours, to attend meetings at national and provincial levels for collective bargaining purposes. Furthermore, such trade union representatives are entitled to take reasonable time off for preparatory meetings during the collective bargaining process.

F.3.1.2 Provisions

- F.3.1.2.1 Identified representatives must give their supervisors reasonable notice of meetings to be attended and proof that they have been nominated to attend such meetings.
- F.3.1.2.2 Confirmation of meetings must be submitted by the representative to his/her supervisor for record and auditing purposes.
- F.3.1.2.3 Subsequent to representatives attending meetings, confirmation must be given by the trade union to the representative's supervisor that he/she had attended such meetings.
- F.3.1.2.4 In addition, representatives are allowed a maximum of 1 additional school day per event, which should be regarded as special leave with full pay, for preparatory meetings during the collective bargaining process; provided that the employee organisation confirms that such preparation is essential to the collective bargaining process and that the duration of such preparation necessitates the maximum or a lesser amount of hours required.

F.3.1.3 Payment for time off

In terms of this entitlement, the duly elected, identified trade union representative is allowed time off with full pay.

Note: The functions referred to in paragraph F.3.1.1 to F.3.1.2 will be performed primarily by SS appointed in terms of ELRC Collective Agreement 2 of 2007 but, subject to

this provision, trade unions may utilise other identified union representative/s for agreed upon interaction with the employer at the level of the circuit/district, regional or provincial after negotiating with the identified employer representative/s designated by the HoD. (Clause 8.1.1 and 8.1.2 of ELRC Collective Agreement No. 2 of 2007).

F.3.1.4 **Time off for trade union duties**

F.3.1.4.1 **Entitlement**

Duly elected, identified representatives of a trade union may take reasonable time off, including during school hours, to carry out trade union duties which have been agreed to between the parties of the ELRC.

F.3.1.4.2 **Provisions**

(a) The following trade union duties are provided for:

(i) Representing members in good standing during –

- disciplinary hearings
- grievance and dispute procedures
- retrenchment/redundancy procedures
- dismissals.

(ii) Attending labour relations training.

(ii) Attending, participating in and organising workplace forums.

(b) The amount of time off to be allowed must not exceed a maximum of three (3) school days at a time and the entitlement is limited to a maximum of twelve (12) school days per annum. Should additional time off be essential and in the interest of labour peace, the employer may, with due regard to the principles of reasonableness and fairness, consider a motivated request for additional time off.

F.3.1.4.3 **Payment for time off**

In terms of this entitlement, and subject to the limitations of the entitlement, representatives are allowed time off with full pay.

F.3.1.5 **Time off for trade union activities**

F.3.1.5.1 **Entitlement**

Subject to the academic programme not being interrupted, an employee who is a registered member in good standing with a trade union, may take reasonable time off during working hours to participate in agreed to trade union activities.

F.3.1.5.2 **Provisions**

The following trade union activities are provided for:

- (a) Attending pre-arranged workplace meetings, other than those arising out of industrial action, which have been agreed to between the trade union affected and the employer, and which cannot be held outside working hours.
- (b) Meeting full-time officials, by arrangement and agreement between the trade union and employer, to discuss bona fide trade union matters.
- (c) Voting during trade union elections where voting cannot take place outside working hours.
- (d) Voting in respect of procedural/lawful strike actions.

F.3.1.5.3 Payment for time off

Trade union members are allowed a maximum of eight (8) school hours per annum, calculated from 1 January to 31 December of each year, with full pay to engage in the activities indicated above.

Note: Where there is a dispute relating to time off, the provisions of the Constitution of the ELRC will apply. Time off with full pay is permitted for trade union members/representatives to engage in this process.

F.4 SECONDMENT TO TRADE UNIONS

F.4.1.1 Entitlement

The employer recognises the need for trade unions to utilize the skills and expertise of their members to manage the affairs of the trade union. Trade unions are therefore entitled to have educators seconded to trade unions registered with the ELRC, to occupy full time positions to which they have been duly elected.

This entitlement applies only to trade unions in good standing, and who comply with the provisions of the LRA and the Constitution of the ELRC.

F.4.1.2 Basis upon which the number of trade union members in good standing, will be allowed to be seconded for a contracted period of one year

F.4.1.2.1 Consideration must be given to the teaching and learning programme. It is important that the entitlement does not disrupt the school programme or the management of education.

F.4.1.2.2 For this purpose this entitlement is structured in such a manner that it applies to a calendar year, that is, from 1 January to 31 December of each year.

F.4.1.2.3 Trade unions will have to elect or appoint their officials on the basis of a calendar year.

F.4.1.2.4 The following formula will apply in respect of the secondment of trade union members in good standing, to full-time positions in a trade union for a period of one (1) year:

Number of audited employee organisation members (i.r.o. a federation, membership can only be counted once)	Number of members to be allowed to be seconded to full-time positions in an employee organization
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0 - 3000	0
3001 - 5000	1
5001 - 8000	2
8001 - 12000	3
12001 - 17000	4
17001 upwards	An additional 1 member for every 6000 above 17000 to a maximum of 7 additional members

F.4.1.3 Payment in respect of seconded educators

- F.4.1.3.1 Members of trade unions in good standing, who have been seconded to trade unions in accordance with this entitlement, will retain all their benefits.
- F.4.1.3.2 Trade unions must be responsible for refunding the full package payable to members seconded in terms of this entitlement.
- F.4.1.3.3 The GS of the ELRC must keep separate and accurate records of payments made in terms of this entitlement.

F.4.1.4 Entitlement in respect of national negotiators

- F.4.1.4.1 This entitlement will apply only to national negotiators of trade unions in the ELRC, who are educators at schools and who are representatives of the ELRC in terms of the provisions of clause 7 of the constitution of the ELRC.
- F.4.1.4.2 In addition to the entitlement provided for in paragraph F.4.1.2 and F.4.1.3 above, trade unions are entitled to have national negotiators seconded.
- F.4.1.4.3 Such secondment will be for a maximum period of one (1) year at a time, renewable for such longer period as may be agreed to between the employer and relevant trade union.
- F.4.1.4.4 The GS of the ELRC must from time to time, furnish provincial heads of departments with the names and particulars of national negotiators.
- F.4.1.4.5 An employee returning to duty, upon completion of the period of secondment, must be assigned:
 - (a) In the case of a period of secondment of up to two (2) years, to the position/post that he/she would have held if the secondment had not been taken, or at his/her request, to another post/position agreeable to the employer.
 - (b) In the case of a period of secondment of more than two (2) years, to an equivalent position/post to that held prior to the secondment, which is acceptable to the employee, and which shall be reasonable and fair.
- F.4.1.4.6 The employer will remain responsible for the seconded employee's full remuneration package which is not subject to the provisions of paragraph F.4.1.3.2 above, while the relevant trade union will be responsible for 50% of the full remuneration package of the temporary substitute.

F.4.1.4.7 The provisions relating to the retention of benefits and method of payment, as provided for in paragraph F.4.1.3 above apply **mutatis mutandis**.

F.5 SECONDMENT OF SHOP STEWARDS (*ELRC Collective Agreement No. 2 of 2007*)

F.5.1 Election, nomination and appointment of Shop Stewards (SS) in Education:

F.5.1.1 Eligibility for appointment as a SS.

F.5.1.2 In order to be appointed as a SS a person must:

F.5.1.2.1 Be a post level one and a permanent educator at a school-based institution.

F.5.1.2.2 Have been elected or nominated by the trade union of which that person is a member.

Note: Departmental heads and deputy principals, who were SSs in 2006 and extended or nominated in 2007, may continue as SSs, until replaced.

F.5.1.2.3 Allocation and distribution of SS

- (a) The maximum number of SSs that may be appointed, is 120.
- (b) The distribution of the SSs from the 1st August 2007 will be as reflected in Annexure F.1.
- (c) The determination by the GS of the ELRC of the distribution of the SSs must take into cognisance the size of the province and the vote weights of the admitted trade unions in that province.
- (d) The determination, in Annexure F.1, is based on the vote weights calculated as on 31st December 2006; and this takes effect from 1st July 2007.
- (e) The determination for the succeeding years will be based on the vote weights calculated as at the 30th September of the preceding year, and will be valid for the period 1 January to 31 December of each calendar year (no change in allocations during the course of the year).
- (f) The GS of the ELRC must issue the determination by mid-November at the latest to all parties concerned.

F.5.1.2.4 Notice of the elected or nominated SS

- (a) In submitting an appointee as proposed SS, the trade union parties to the ELRC must ensure that SS nominated or elected by them are allocated to deal with the trade union's functions and interaction with the employer at national, provincial and or regional/district level.
- (b) Once the trade unions have nominated or elected their SS, the trade unions must notify the national and the respective provincial departments of education and the

GS of the ELRC, in writing, of these names and details of the educator, on the prescribed form.

- (c) In its notification the trade union must specify all the details required, for the notification to be valid.

F.5.1.2.5 Appointment of the SS

- (a) The persons nominated or elected to the position of SS will be duly appointed once the national and the respective provincial departments of education and the GS of the ELRC have received the notifications referred to in paragraph F.5.1.2.4. Their appointment will be by way of a secondment.
- (b) The provincial departments of education undertake to inform all educators by means of a circular distributed to all the education institutions of the contact details of the appointed SSs for that province.
- (c) The trade unions undertake to inform all their members of the contact details of their appointed SSs for the province concerned.

F.5.1.2.6 Period of appointment

- (a) The trade union must determine the period of appointment of the SS, but not less than one year at a time.
- (b) The SS will be seconded from the date of appointment and until the expiry of the period or when replaced, by the relevant trade union, whichever is applicable.

F.5.2 Benefits

F.5.2.1 The relevant provincial department of education must pay the appointed SS his/her full remuneration package.

F.5.2.2 A SS who returns to his/her educator duties must be assigned the post he/she left prior to his appointment. If this is impossible and/or impractical or not in the best interest of education, the provincial department of education must offer the SS a suitable alternative, commensurate with the post that the SS held prior to his/her appointment as a SS.

F.5.2.3 Notwithstanding the above, the educator concerned, during the period of appointment as a SS, shall retain all the rights and benefits attached to his/her educator post, including salary increases, promotion opportunities and benefits associated with his/her seniority as if he/she had not been seconded.

F.5.3 The rights, duties and obligations of a SS

F.5.3.1 The role and functions of a SS include, but are not limited to, the following:

F.5.3.1.1 To assist and communicate with educators about education, employment and trade union related matters.

F.5.3.1.2 To assist and represent his/her trade union's members in disciplinary hearings, in processing grievances and in appeal procedures in terms of the EEA.

- F.5.3.1.3 To assist and represent his/her trade union's members in dispute resolution procedures declared in terms of the ELRC's dispute resolution procedures.
- F.5.3.1.4 To represent his/her trade union and participate in collective bargaining processes, including consultations and negotiations with the employer and its representatives.
- F.5.3.1.5 To assist his/her trade union in monitoring the employer's compliance with the provisions of any workplace-related laws and any collective agreement binding on the employer.
- F.5.3.1.6 To report any alleged contravention of a workplace-related provision of any law and any collective agreement binding on the employer to the employee, his/her trade union or any responsible authority or agency.
- F.5.3.2 The SS, in performing his/her functions, must endeavour:
 - F.5.3.2.1 To establish and maintain good relations between his/her trade union and its members, and the employer.
 - F.5.3.2.2 To follow all applicable procedures regulating the employer-employee relationship and advise his/her trade union's members to follow these procedures.
 - F.5.3.2.3 To put all his/her time at the disposal of employer/employee interactions.
- F.5.3.3 The SS must represent the interests of the union and its members in accordance with the instructions and mandate of the trade union that elected or nominated him or her.
- F.5.3.4 The SS must report to his/her trade union regarding his/her work, any matter associated with the carrying out of his/her duties and the SS is accountable to his/her trade union with respect to his/her performance as a SS. The trade union must provide the GS of the ELRC with a report of the performance of the SS by the 7th of April of each year.
- F.5.3.5 A SS may not interfere with any lawful and legitimate instruction given by the employer or his/her representative to an employee. A SS may not unlawfully interfere with the performance of any employee's duties, failing which; the employer will deal with the SS according to the LRA.
- F.5.3.6 The SS may provide advice to his/her trade union's members. The SS may encourage or direct any of the SS's trade union's members to comply with any lawful decision of his/her trade union.
- F.5.3.7 The SS may exercise all the trade unions' organisational rights and obligations as set out in various statutes of parliament and collective agreements of the ELRC.
- F.5.3.8 Right of access
 - F.5.3.8.1 The SS may meet with educators on the premises of the educational institution or departmental office of the employer; provided that the SS has obtained prior permission from the head of the relevant educational institution or, in the case of a departmental office, the appropriate representative of the employer. Office hours and teaching time does not include tea and lunch breaks.

- F.5.3.8.2 The SS may hold meetings with educators provided that:
- (a) In the case of educational institutions, the meeting takes place outside the formal teaching or learning day and does not interfere with the functioning of the educational institution.
 - (b) In the case of an office of the employer, the meeting takes place outside office hours and does not interfere with the functioning of the respective office.

F.5.3.8.3 The SS may only hold meetings with individual educators during office hours or teaching time under the conditions stipulated in the PAM and provided that the SS has the prior approval of the relevant heads of the educational institutions or, in the case of departmental offices, the appropriate representatives of the employer. An SS must, as far as possible, try to meet with an educator outside of actual teaching or learning time.

F.5.3.9 Disclosure of information

A SS is entitled to full disclosure of all relevant information in accordance with and subject to the qualifications provided in section 16 of the LRA and PAIA.

F.5.3.10 Victimisation and prejudice

The employer undertakes not to victimise or prejudice an educator by virtue of:

F.5.3.10.1 His/her election, nomination or appointment as a SS.

F.5.3.10.2 His/her possible election, nomination or appointment as a SS.

F.5.3.10.3 The performance by the SS of his/her duties.

F.5.4 Withdrawal or termination of the appointment of a SS

F.5.4.1 A SS's appointment terminates at the end of his/her period of appointment, if applicable.

F.5.4.2 A SS's appointment shall terminate if:

F.5.4.2.1 The SS is transferred to another provincial education department.

F.5.4.2.2 The SS ceases to be a member of the trade union that nominated and elected him or her.

F.5.4.2.3 The SS ceases to be an educator.

F.5.4.2.4 The SS resigns in writing as an SS.

F.5.4.2.5 The SS's appointment is terminated in terms of paragraph F.5.4.3.

F.5.4.3 A SS may be withdrawn if:

F.5.4.3.1 The SS accepts a promotion to a higher post level at an institution or into a departmental office based post.

F.5.4.3.2 If the trade union, which appointed him or her, decides so.

F.5.4.4 Withdrawal of a SS for misconduct

F.5.4.4.1 The employer may refer the matter in writing to the SS's trade union, if the employer is not satisfied with the manner in which a SS is conducting himself/herself. In the referral the employer must specify the conduct complained of. A copy of the referral must be sent to the SS.

F.5.4.4.2 If the matter is not resolved between the employer and the relevant trade union within fourteen (14) days from the date on which the referral referred to in paragraph F.5.4.4.1 reaches the trade union, the employer may refer the matter to the GS of the ELRC for resolution in terms of the ELRC's dispute resolution procedures.

F.5.4.4.3 The employer may refer the matter to arbitration if the dispute is not settled at conciliation. At arbitration the employer may seek an order withdrawing the SS.

F.5.4.4.4 The arbitrator, when deciding whether to grant an order withdrawing the SS, must consider amongst others, the following:

- (a) The seriousness of the misconduct complained of.
- (b) The steps taken to correct the conduct complained of.
- (c) The inherent nature of the conflict between a trade union and the employer.
- (d) The SS's and the trade union's freedom of association rights as set out in the LRA.
- (e) The impact that any order terminating the appointment of the SS will have upon the employer, the trade union, the SS and labour relations generally.

F.5.4.4.5 Notwithstanding the above, the employer may, where necessary and applicable, follow the disciplinary procedure outlined in the EEA.

F.5.4.5 In the event of a vacancy arising from the withdrawal of a SS, the trade union concerned may appoint another member as a replacement for the duration of the outstanding period, if applicable.

F.5.4.6 In the event that the relevant provincial department of education has to appoint another substitute in the place of the new SS and pay the salary for two substitutes, the relevant trade union must bear the cost of the additional substitute, which is payable to the relevant employing department.

F.5.5 **The trade union's obligations**

F.5.5.1 The trade unions undertake not to use other trade union representatives, who are not SSs, in activities that take place during the period when these trade union representatives are supposed to be attending to their teaching duties; except in circumstances prescribed in the PAM.

F.5.5.2 The undertaking in paragraph F.5.5.1 does not:

- F.5.5.2.1 Prevent full-time office-bearers and officials of trade unions from attending to these activities.
- F.5.5.2.2 Affect the right of other union officials/representatives to perform their trade union functions and duties.
- F.5.5.3 The trade union must try to ensure that a SS is available to attend to the functions set out in paragraph F.5.3.
- F.5.5.4 The SS's trade union must pay for all expenses and meet all the other needs associated with the performance of the SS's activities, excluding the SS's remuneration.
- F.5.5.5 The SS must be based at the offices of their trade union in the province to which they are allocated.

F.5.6 Funding

- F.5.6.1 The ELRC will fund the provisioning of the SSs as follows:
 - F.5.6.1.1 The amount budgeted for the SSs must be divided by the total number of SSs (120) to determine the cost of one SS per annum.
 - F.5.6.1.2 The provincial department of education will receive payment, in arrears, for SSs as calculated above, on a 6 monthly basis during November and May of each year.

F.5.7 Reporting

- F.5.7.1 The GS of the ELRC shall develop a pro forma guideline to report on the functioning and performance of the SSs as per clause F.5.3 above.
- F.5.7.2 The trade unions, (either at a national or provincial level) would provide such report to the GS of the ELRC on a quarterly basis (7th July, 7th October, 7th January and 7th April).
- F.5.7.3 The GS of the ELRC must maintain the privacy and confidentiality of details of grievance and dispute hearings; except for statistical purposes.
- F.5.7.4 The GS of the ELRC must submit a quarterly report, in the accounting officer's report, to the ELRC on the effective utilisation and contributions of the SSs.

ANNEXURE F.1

SS DISTRIBUTION – CURRENT OR EXPIRED

	KZN	EC	LIM	GAU	NW	MPL	WC	FS	NC	TOTAL
Tot. No. of educators	73979	69455	51152	40144	30503	25524	24768	24083	6317	346061
Percentage	15.83	14.16	12.5	11.6	10.8	10	9.16	8.3	7.5	
No. of SS	18	17	15	14	13	12	12	10	9	120
CTU "SADTU"	8	12	10	7	9	9	8	7	7	77
CTU "SAOU"	10	5	5	7	4	3	4	3	2	43

1ST AUGUST 2007 TO 31 DECEMBER 2007

	KZN	EC	LIM	GAU	NW	MPL	WC	FS	NC	TOTAL
Tot. No. of educators	77135	65978	52159	41332	29543	30988	24132	24125	6465	351857
Percentage	15.83	14.16	12.5	11.6	10.8	10	9.16	8.3	7.5	
No. of SS	18	17	15	14	13	12	12	10	9	120
CTU "SADTU"	10	13	11	7	9	9	8	6	6	79
CTU "SAOU"	8	4	4	7	4	3	4	4	3	41

CHAPTER G: GRIEVANCE PROCEDURE

- G.1 DEFINITIONS
- G.2 OBJECTIVE
- G.3 ADHERENCE TO TIME LIMITS
- G.4 DEALING WITH GRIEVANCES

ANNEXURE

Annexure G.1 Grievance form

G.1 DEFINITIONS

In this procedure, unless the context indicates otherwise-

“**Constitution**” means the Constitution of the Republic of South Africa, 1996 (Act No. 108 of 1996).

“**educator**” means any person who teaches, educates or trains other persons or who provides professional educational services, including professional therapy and education psychological services, at any public school, departmental office or adult basic education centre and who is appointed in a post on any educator establishment under the EEA, 1998.

“**employer**”, in relation to any provision of Chapter 4, 5 or 7 of the EEA, 1998 which applies to, or is connected with –

- (a) an educator in the service of the department of basic education, means the Director-General;
- (b) an educator in the service of a provincial department of education, means the HoD.

“**days**” refers to working days.

“**EEA**” means Employment of Educators Act, 1998 (Act No 76 of 1998).

“**grievance**” means a complaint by an employee or employees affecting the employment relationship of the person or persons concerned, or where there is an alleged misinterpretation, or violation of his or her, or their rights.

“**head of department**” means the incumbent of a post mentioned in Schedules 1, 2 and 3 of the Public Service Act, 1994, or the person acting in such post.

“**Public Service Act**” means the Public Service Act, 1994 (Proclamation No 103 of 1994).

“**Member of the Executive Council**” means the Member of the Executive Council of a province responsible for the education portfolio of that province.

“**Minister**” means the Minister of Basic Education.

“**recognised trade union**” means all the trade unions admitted to the ELRC as well as any other trade union that enjoys the relevant organisational rights.

“**resolve**” means to settle a grievance to the satisfaction of the aggrieved educator.

“**representative**” means a fellow educator, a representative or official of a recognised trade union.

G.2 OBJECTIVE

G.2.1 Purpose and Application

The purpose of this grievance procedure is to address grievances in public education by fulfilling the primary objectives of this procedure which is to promote –

G.2.1.1 Speedy, impartial and equitable handling of grievances.

G.2.1.2 Sound labour relations.

G.2.1.3 Resolution of individual grievances at the lowest possible level in a department.

G.3 ADHERENCE TO TIME LIMITS

G.3.1 In determining adherence to time limits, this should be calculated by excluding the first day and including the last day.

G.3.2 A formal written grievance must be lodged with the employer within 90 days from the date on which the educator became aware of the act or omission which adversely affects him/her.

G.4 DEALING WITH GRIEVANCES

G.4.1 Oral Interview

G.4.1.1. A sincere attempt should be made to resolve any grievance by oral interview between a grievant(s) and the head of a school (herein after referred to as “the head”), and in the case of an educational institution outside a school or the head of a school, the supervisor (hereinafter referred to as “the supervisor”), before differences become formalised grievances.

G.4.1.2. During this process no records will be kept of proceedings which will be without prejudice to either of the parties.

G.4.2 Formal Written Grievance: Institutional Level, (School) and Departmental Level

G.4.2.1. A grievant(s) may lodge a grievance or grievances with the head or the supervisor in writing within a reasonable period of time, but in any event not later than 90 calendar days following on the time and date on which the alleged grievance or grievances occurred. Full details of the nature of the grievance or grievances must

be relayed to the head or the supervisor, as the case may be. The grievant(s) must use the attached Form (Annexure G.1) to formally lodge the grievance. The grievance or grievances must bear the signature or signatures of the grievant(s) and a copy thereof shall be filed with the relevant office of the provincial department of education by the head or supervisor, as the case may be, which office shall be identified by the relevant head of a provincial department in each province.

- G.4.2.2 The head or the supervisor, as the case may be, shall confer with the grievant(s), and others involved, within three (3) working days of receipt of the formal written grievance in order to resolve the grievance. At this meeting the facts shall be presented and considered and an effort shall be made to resolve the matter to the satisfaction of all parties.
- G.4.2.3 The head or the supervisor, as the case may be, shall communicate the outcome to the relevant office of the provincial department of education within five (5) working days of the resolution or non-resolution of a grievance.
- G.4.2.4 If an action or lack of an action, or a decision or lack of a decision, concerns the head or the supervisor, the grievant(s) may refer the matter directly to the regional/district level in respect of a school and departmental level in respect of an institution outside a school, provided that a sincere attempt has been made to resolve the grievance or grievances in terms of the provisions of paragraph G.4.1 above.
- G.4.3. Regional/district level in respect of a school and departmental level in respect of an institution outside a school**
- G.4.3.1 If the grievant(s) is/are not satisfied with the outcome referred to in paragraph G.4.2 above, the grievant(s) may refer the matter in writing, by hand or registered mail, together with the decision of the head or the supervisor, as the case may be, to the regional/district head of education in the case of an educator at a school and in the case of an educator outside a school to the office referred to in paragraph G.4.2.4 within five (5) working days of the parties failing to resolve the grievance or grievances. A copy of the referral must be presented to the head or supervisor, as the case may be, and where applicable, to the grievant(s)' trade union.
- G.4.3.2 The head or the supervisor shall forward his or her comments together with all relevant information on the grievance or grievances to the regional/district head or the office referred to in paragraph G.4.2.4, as the case may be, within five (5) working days after receiving the referral mentioned in paragraph G.4.3 above.
- G.4.3.3 The head of the region/district or the head of the relevant provincial education department, or his/her delegate in respect of an educator outside an educational institution, shall within five (5) working days from the date of receipt of all the parties' referrals, attempt to resolve the grievance or grievances and communicate his or her decision in writing to all parties.
- G.4.3.4 Should the grievant(s) not be satisfied with the outcome, he or she may register a formal dispute with the GS of the ELRC in terms of the provisions of the ELRC's Constitution.
- G.4.4 A trade union registered with the ELRC may register a grievance with the head or supervisor or the head of a relevant department of education, as the case may be, on

behalf of its members individually or collectively and represent such member or members during any stage of this grievance procedure. A non-member(s) may be represented by another employee.

- G.4.5 The parties to a grievance or grievances may by agreement extend the periods referred to in paragraphs G.4.3.1. and G.4.3.2. and G.4.3.3. above.

Annexure G.1

GRIEVANCE FORM

PLEASE READ THE FOLLOWING INSTRUCTIONS BEFORE COMPLETING THE FORM

1. This form must be used to lodge a formal grievance (excluding an alleged unfair dismissal) when you are dissatisfied with an act or omission and you have been unable to resolve the problem by using informal discussion.
2. You have to lodge your grievance within 90 days from the date on which you became aware of the act or omission which adversely affects you.
3. You may be assisted or represented by a fellow educator or a representative or official from a recognised trade union.
4. It is important to complete all information accurately. When the form is completed, it must be given to the person designated to facilitate grievances at your institution. The department will attach this form to the grievance documentation and it will be used through all stages of the grievance procedures.
5. At each stage where a person within the relevant structure of authority attempts to resolve the grievance, each party will complete the appropriate part of the form. You will be given an opportunity to respond to each and every comment.
6. At the conclusion of each stage of the grievance procedure, the head or supervisor will provide you with a copy of the completed form.
7. Once the grievance has been resolved, you do not need to complete the rest of the form.
8. You are required to complete Parts A and B of this form and to then hand it to the head or the supervisor, as the case may be, at your institution/office. The head or the supervisor, as the case may be, will affix his/her signature in the block below Part B of the form to indicate that the grievance has been received. Ensure that you receive a copy of the form where receipt of your grievance has been acknowledged.
9. Part C of the grievance form will be completed by the head or the supervisor, as the case may be, and grievant(s) will be provided with copy during the various stages where attempts will be made to resolve the grievance.

PART A: PERSONAL PARTICULARS

To be completed by the aggrieved educator

INITIALS AND SURNAME

PERSAL NUMBER

REGION/DISTRICT		
SCHOOL / OFFICE		
RANK / POST LEVEL		
DATE ON WHICH YOU BECAME AWARE OF THE ACT OR OMISSION		
PERSONAL CONTACT DETAILS	TEL:	CELL:
	FAX:	
CONTACT DETAILS OF REPRESENTATIVE	TEL:	CELL:
NAME OF TRADE UNION		
CONTACT DETAILS OF TRADE UNION	TEL:	FAX:
PART B: DETAILS OF THE GRIEVANCE		
<i>To be completed by the aggrieved educator(s)</i>		
What are you aggrieved about? (If space below is not enough, please attach additional page(s)):		

What solution do you propose?		

SIGNATURE: _____	DATE _____	
Receipt of grievance form acknowledged and a copy given to aggrieved educator(s)		
SIGNATURE _____	DATE: _____	
NAME: _____	RANK: _____	

PART C: GRIEVANCE RESOLUTION: LEVELS
NOTES:
<i>This part of the form makes provision for levels of authority to attempt to resolve the grievance. depending on the circumstances, one or more pages below need to be completed.</i>
<i>The grievance must be dealt with by the applicable levels within the periods referred to in the procedure, unless extended by agreement with the aggrieved educator.</i>
<i>Should the grievance not be attended to within the periods referred to in the procedure or extended period agreed to with the aggrieved educator(s), in the case of an alleged unfair labour practice, the</i>

<i>aggrieved educator(s) has/have the right to refer a dispute to the Education Labour Relations Council to be dealt with in terms of the dispute resolution procedures.</i>				
<i>To be completed on behalf of the Head of Department</i>				
NAME OF OFFICIAL				
DESIGNATION				
RELATIONSHIP WITH AGRIEVED EDUCATOR	SUPERVISOR/ HEAD	COMPONENT HEAD	DISTRICT HEAD/DIRECTOR	
TEL:	CELL:		FAX:	
Was the grievance resolved?		Yes		No
Comments by the aggrieved educator(s) if necessary				
SIGNATURE: _____ DATE _____				
On behalf of Employer				
NAME: _____ RANK _____				
Was the grievance resolved		Yes		No
Comments by the aggrieved educator(s) if necessary				
SIGNATURE _____ DATE: _____				
EDUCATOR				

PART D : REGION/DISTRICT OR DEPARTMENTAL LEVEL	
<i>To be completed on behalf of the Head of Department</i>	
NAME OF OFFICIAL	
DESIGNATION	

RELATIONSHIP WITH AGRIEVED EDUCATOR	DISTRICT/REGIONAL HEAD	COMPONENT HEAD	DIRECTORATE
TEL: _____	CELL: _____	FAX: _____	
Decision in respect of the grievance and reasons for the decision (If space below is not enough, please attach additional page(s)):			

SIGNATURE: _____		DATE: _____	
On behalf of Employer			
NAME: _____		RANK: _____	
Was the grievance resolved		Yes	
		No	

If no, the aggrieved educator (s) must explain why she/he or they are still dissatisfied	

SIGNATURE _____	
EDUCATOR	
DATE: _____	

CHAPTER H: LEAVE MEASURES

- H.1** **DEFINITIONS**
- H.2** **LEGISLATIVE FRAMEWORK**
- H.3** **GENERAL PROVISIONS**
- H.4** **ANNUAL LEAVE**
- H.5** **SICK LEAVE**
- H.6** **LEAVE FOR OCCUPATIONAL INJURIES AND DISEASES**
- H.7** **SPECIAL LEAVE FOR QUARANTINE PURPOSES**
- H.8** **MATERNITY LEAVE AND PRE-NATAL LEAVE**
- H.9** **ADOPTION LEAVE**
- H.10** **SURROGACY LEAVE**
- H.11** **FAMILY RESPONSIBILITY LEAVE AND SPECIAL LEAVE FOR URGENT PRIVATE AFFAIRS**
- H.12** **SPECIAL LEAVE FOR PROFESSIONAL AND PERSONAL DEVELOPMENT AND FOR RELIGIOUS OBSERVANCES**
- H.13** **SPECIAL LEAVE FOR STUDY PURPOSES**
- H.14** **SPECIAL LEAVE FOR EXAMINATION PURPOSES**
- H.15** **SPECIAL LEAVE FOR PARTICIPATING IN SPORTING, CULTURAL AND OTHER EVENTS**
- H.16** **SPECIAL LEAVE IN EXTRAORDINARY CIRCUMSTANCES**
- H.17** **UNPAID LEAVE**
- H.18** **UNPAID LEAVE FOR CONTINUITY OF SERVICE**
- H.19** **LEAVE PROVISIONS FOR TEMPORARY EDUCATORS**

ANNEXURE

- Annexure H.1 Application for leave of absence: school-based educators
- Annexure H.2 Agreement: Special leave for study purposes

H.1 **DEFINITIONS**

“*education institution*” is a public school, training institution or adult education centre as defined in the EEA or any other institution that provides specialised tuition and where learning activities are discontinued during institution closure periods.

“*institution closure period*” is the scheduled period that education institutions close at the end of each term and during which period teaching and learning activities are discontinued.

“*institution-based educator*” means an educator who is employed at an education institution and whose normal duties are discontinued during institution closure periods.

“*office-based educator*” means an educator who is not an institution-based educator.

“remuneration” means –

- (a) In respect of school-based educators and office-based educators who are not members of the MMS:
 - (i) For purposes of calculating pay for unused annual leave and severance pay, remuneration means the educator's annual salary PLUS 37% of his/her basic salary.
 - (ii) For purposes of calculating capped leave and unpaid leave, remuneration means the educator's annual basic salary.
- (b) In respect of office-based educators who are members of the MMS:
 - (i) For purposes of calculating pay for unused annual leave, unpaid leave and severance pay, remuneration means the educator's all-inclusive remuneration package.
 - (ii) For purposes of calculating capped leave, remuneration means the educator's annual basic salary (*paragraph 4.6 of the Determination and directive on leave of absence in the public service, August 2012*).

“*scheduled working time*” in respect of institution-based educators means –

- (a) All the time during a school term, both during and outside the formal school day, that institution-based educators must perform duties in terms of the measures in Chapter A.
- (b) Days during an institution closure period that have been scheduled by the Minister, in accordance with NEPA for these educators to report for administrative duties or by the HoD for these educators to report for in-service training in terms of paragraph A.4.2 of Chapter A of these measures.

“Current leave cycle” means the leave accrued by office-based educators as from 1 January of the current year of employment up until 31 December of the same year.

“Capped leave” is the leave accrued by all educators up until 31 December 2001, which is payable upon early or normal retirement, death or medical boarding.

Note: In the case of educators employed by the DBE, reference to HoD means Director-General.

H.2 LEGISLATIVE FRAMEWORK

ELRC Collective Agreement No. 7 of 2001
 Government Gazette No. 22961 of 2001, dated 19 December 2001 (Leave measures)
 PSCBC Resolution No. 7 of 2000
 Government Gazette No. 29248, dated 22 September 2006 (PILIR)
 Government Gazette No. 28264, dated 25 November 2005 (8-week rule)

Determination and directive on leave of absence in the public service (Department of Public Service and Administration, August 2012)
 Labour Relations Act of 1995, as amended
 Basic Conditions of Employment Act, 1997
 Employment of Educators Act, 1998
 PSCBC Resolution 1 of 2012
 Government Gazette No. 38249, dated 27 November 2014

H.3 GENERAL PROVISIONS

- H.3.1 The employer may determine that an attendance register be kept in which an educator must record the time of his/her arrival at and departure from his/her place of duty. (*Regulation 24 of the Regulations regarding the terms and conditions of employment of educators*)
- H.3.2 Z1 (a) form as amended by the Minister of Public Service and Administration in terms of paragraph 6 of Schedule 1 of the Public Service Regulations, 2001 as amended, is the official government leave form to be used to record the types of leave applied for by an office based educator.
- H.3.3 School-based educators must use the attached leave form (Annexure H.1) referred to as APPLICATION FOR LEAVE OF ABSENCE: SCHOOL-BASED EDUCATORS.
- H.3.4 In interpreting Section B of the leave form for school-based educators, principals (school managers) must keep manual records of the utilisation of leave in Section B and or capped leave applied for as part of a day.
- H.3.5 After reaching the prescribed daily number of working hours for a specific type of leave, the principal must cause the educator to complete and submit a leave form.
- H.3.6 Different types of leave must not be combined to reach the daily number of working hours e.g. do not combine pre-natal leave, normal sick leave and/or family responsibility leave to reach the prescribed daily number of working hours.
- H.3.7 The application for leave of absence form must not be used as a sanction for offences related, for example, to late coming. Instead the normal disciplinary measures contained in Schedule 2 of the EEA must be used.

H.4 ANNUAL LEAVE

H.4.1 General Measures

- H.4.1.1 Educators are entitled to annual leave with full pay during each leave cycle of 12 months, commencing on 1 January of each year.
- H.4.1.2 An educator retains all his/her leave credit when he/she is transferred within a department or between state departments without a break in service.

- H.4.1.3 Unless indicated otherwise in these measures, days of leave granted in respect of any category of leave, other than annual leave, will not be deducted from an educator's leave provision in respect of annual leave.
- H.4.1.4 An educator will not be considered to be on leave if he/she:
- H.4.1.4.1 Must appear as a witness-
- (a) In any court.
 - (b) In misconduct proceedings or in a misconduct investigation in terms of any law.
 - (c) At inquest proceedings.
 - (d) Before a commission or committee appointed by the state or before any committee or institution instituted by or in terms of any act.
- H.4.1.4.2 Appears as defendant or co-defendant in civil proceedings arising from his/her official duties and in which the state or any statutory body or institution has a direct interest.
- H.4.1.4.3 Is taken into custody or must appear in any court on a criminal charge and the offence he/she is charged with is withdrawn or if he/she is acquitted of such offence.
- H.4.1.4.4 Attends or participates in a training program required by the employer or the professional body with whom he/she is required to register in order to remain registered or with the approval of the employer attends or participates in a training program or other activity that is in the employer's interest.

H.4.2 Annual Leave Entitlement of Institution-Based Educators

- H.4.2.1 An institution-based educator will be regarded as being on annual leave during institution closure periods that are outside of scheduled working time, provided that the measures regarding the workload, duties and responsibilities of educators may require such an educator to perform some of his/her normal duties, such as preparation for the new school term or the marking of internal examination scripts, during such periods. However, such an educator will not be required to report at any work place to perform any of these duties.
- H.4.2.2 If, after sufficient notice, an institution-based educator is required by the employer to report for official duty during an institution closure period outside the scheduled working time, he/she will be remunerated additionally for the performance of such duties in terms of the applicable measures in Chapter C. Such remuneration will not apply in respect of the voluntary performance of duties by an educator during an institution closure period.
- H.4.2.3 Save for leave accrued in terms of paragraph H.4.5.1., an institution-based educator does not accrue any leave credit for purposes of payments, for carry over to a next leave cycle, or for extending other forms of leave.

H.4.3 Annual Leave Entitlement and Measures in Respect of Office-Based Educators

- H.4.3.1 The main purpose of annual leave is to provide periods of rest to an office-based educator but, subject to these measures, may also be used to extend periods of other categories of leave as provided in these measures.
- H.4.3.2 An educator is entitled to annual leave with full pay during each leave cycle of 12 months, commencing on 1 January of each year, except if appointed after 1 January of each year.
- The full year leave entitlement of an office-based educator is –
- 22 working days in respect of an educator with less than 10-year service.
- 30 working days in respect of an educator with 10 or more years of service.
- H.4.3.3 The annual leave entitlement of an educator appointed after 1 January of each year will be calculated proportionally in relation to each full month of service at a rate of 1,83 working days if entitled to 22 working days, and 2,5 working days if entitled to 30 working days annual leave in a leave cycle.
- H.4.3.4 Temporary educators appointed for a fixed period and educators appointed in a part-time or shared capacity, will be granted annual leave on a pro rata basis.
- H.4.3.5 Annual leave should be planned and scheduled at least at the start of a leave cycle, i.e. January of each year.
- H.4.3.6 For each 15 consecutive days' leave taken without pay, the educator's annual leave entitlement is reduced by 1/24th.
- H.4.3.7 For the purpose of granting annual leave, working days mean Monday to Friday, excluding public holidays.
- H.4.3.8 At least 10 working days must be taken as leave days during the annual leave cycle. The utilisation of this leave must take the service delivery requirements of a department into account. Annual leave should, as far as possible, be taken as consecutive working days.
- H.4.3.9 The remaining leave days, if any, must be taken no later than 6 months no later than 6 months after the expiry of the relevant leave cycle, where-after, unused leave credits will be forfeited.
- H.4.3.10 An educator must submit his/her application for annual leave in advance, unless unforeseen circumstances prevent him/her from doing so. In such a case the educator must submit an application for annual leave personally or through a relative, fellow employee within 5 working days after the first day of absence.
- H.4.3.11 An application for annual leave may not be unreasonably refused. The head of the office/supervisor must take into account service delivery requirements when approving the leave.

- H.4.3.12 If due to the employer's service delivery requirements an office-based educator's application for leave is denied by the employer and not rescheduled, such leave must, upon request, be paid out to the educator at the end of the 6 months' period referred to in paragraph H.4.3.9 above. An educator's request for payment of unused leave credits must be:
- H.4.3.12.1 In writing.
 - H.4.3.12.2 Accompanied by written proof of refusal of leave by the employer or of instruction to report for duty as the case may be.
 - H.4.3.12.3 Lodged by no later than the end of the relevant 6 months' period.
- H.4.3.13 HoDs must, at the end of the relevant 18 months' period, report to the relevant legislature on the number of educators denied annual leave, reasons for such denial and the amount paid in this regard.
- H.4.4.14 Educators must be cautioned timeously, at the end of the relevant cycle, they have not utilised their leave entitlements.
- H.4.3.15 An educator who is appointed after the commencement of an annual leave cycle or whose service is terminated during a leave cycle will, in respect of such cycle, be entitled to annual leave on a pro rata basis determined as a fraction of his/her entitlement:
- H.4.3.15.1 For purposes of utilising leave entitlements, fractions or decimals must be utilised as they are, in other words, fractions or decimals must not be rounded off.
 - H.4.3.15.2 Provincial departments of education must keep records of the utilisation of fractions/decimals and leave forms must be completed for every eight-hour fractions and/or leave taken.
 - H.4.3.15.3 For purposes of converting fractions/decimals of leave entitlements into working hours the following formula(e) should apply:

Converting fractions into hours:

$$A \times B = C$$

Where –

A = represents the number of working hours per day

B = represents the fraction

C = represents the credit in hours

For example: Employee with 7,45 leave credits:
 $8 \times 0.45 = 3.6$ hours

Converting fractions into minutes:

$$60 \times B = C$$

Where –

60 = represents the minutes in an hour

B = represents the fraction

C = total credits in minutes

For example: Employee with 3.6 hours leave credit
 $60 \text{ min} \times 0.60 = 36 \text{ min}$

- H.4.3.15.4 For purposes of leave payouts, fractions or decimals must be used as they are in the formula provided for in paragraphs H.4.3.6 and H.4.4.3.
- H.4.3.15.5 Unused fractions and decimals lapse at the end of the six-months period referred to in paragraph H.4.3.12.
- H.4.3.15.6 If an educator's leave entitlement changes, e.g. from 22 to 30 working days per annum after ten-years satisfactory service, the unused fractions or decimals must also be carried over to the new category and be administered manually.

H.4.4 Payout of Unused Leave Credit (Office-Based Educators)

- H.4.4.1 Office-based educators must be paid the cash value in respect of unused leave credit upon termination of service and in terms of paragraph H.4.3.9 above. The payment will be limited to a maximum number of days, equivalent to the annual leave entitlements.
- H.4.4.2 The leave cycle remains unchanged, therefore, requests and motivations for leave payments in respect of leave credits mentioned in paragraph H.4.3.9 above, must be lodged by no later than 31 July in respect of each year. If an educator failed to apply for the payment of such unused leave credits at the mentioned date, such leave credits will be forfeited.
- H.4.4.3 Payment of annual leave credits will be calculated by using the educator's remuneration.
- H.4.4.4 For all terminations in respect of office-based educators without any capped leave, leave payouts will be calculated in terms of the following formula:

$$\frac{\{(A - B) + (C - D)\} \times E}{260.714}$$

Where:

A = represents the full annual or pro rata leave entitlement in respect of the previous leave cycle. Pro-rata entitlement calculated as

$$\frac{X \times Y}{12}$$

Where –

X = Number of completed months of service;

Y = Annual leave entitlement per leave cycle.

B = represents the leave taken in the previous leave cycle

C = represents the pro rata leave entitlement in the current leave cycle (calculated as above)

D = represents the leave taken in the current leave cycle

E = Represents the educator's remuneration (annual basic salary plus 37% and in the case of a member of the MMS, the all-inclusive package) as at the last day of duty or at the end of the 6-months period mentioned in H.4.3.9 above.

H.4.4.5 For personnel who still have unused leave credits at the expiry of the 6-months period mentioned above, and who complied with the provisions of paragraph H.4.3.9, leave payouts will be calculated in terms of the following formula:

$$\frac{(A - B) \times C}{260.714}$$

Where:

A = represents the full annual or pro rata leave entitlement in respect of the previous leave cycle. Pro-rata entitlement calculated as

$$\frac{X \times Y}{12}$$

Where –

X = Number of completed months of service;

Y = Annual leave entitlement per leave cycle.

B = represents the leave taken in the previous leave cycle

C = Represents the educator's remuneration (annual basic salary plus 37% and in the case of a member of the MMS, the all-inclusive package) as at the last day of duty or at the end of the 6-months period mentioned in H.4.3.9 above.

H.4.5 Annual leave accrued prior to 1 July 2000 and during the period 1 July 2000 to 31 December 2001

H.4.5.1 Educators shall retain all audited leave credits accrued prior to 1 July 2000. The number of accrued leave days prior to 1 July 2000 shall be converted to working days using the following formula:

$$\frac{A \times 5}{7}$$

Where:

A = represents the number of audited leave credits

H.4.5.2 During the periods 1 July 2000 to 31 December 2000 and 1 January 2001 to 31 December 2001 all institution-based educators accrued 5 and 10 working days leave respectively or a pro rata number of such days calculated. Any of these days that were not granted to such an educator since 1 July 2000 shall be added to the number of leave days accrued prior to 1 July 2000.

H.4.5.3 The payouts in respect of such leave credits must be made in the event of:

H.4.5.3.1 Death

H.4.5.3.2 Retirement, including early retirement.

H.4.5.3.3 Medical boarding.

H.4.5.4 The leave payout in respect of educators with capped and audited leave credits will be determined in the following manner:

$$\frac{\{(A - B) + (C - D)\} \times E + (F \times G)}{260.714}$$

Where –

A = represents the educator's full annual or pro rata leave entitlement in respect of the previous leave cycle

B = represents the leave taken in the previous leave cycle

C = represents the pro rata leave entitlement in the current leave cycle

D = represents the leave taken in the current leave cycle

E = represents the educator's remuneration (annual basic salary plus 37% and in the case of a member of the MMS, the all-inclusive package) as at the last day of duty

F = represents the capped leave credits

G = represents the educator's remuneration (annual basic salary only) as at the last day of duty

H.4.5.5 The HoD must determine whether there are periods which are unaudited and in such instances, the educator's leave payout shall be paid on the basis of 6 days per completed year of service up to a maximum of 100 days in respect of the unaudited leave period. The formula in calculating the payout in respect of these days shall be as per paragraph H.4.5.4 above.

H.4.5.6 The HoD must determine procedures and measures in keeping with service delivery needs, on how educators will be allowed to utilise their leave credits accrued prior to the applicable dates referred to in paragraph H.4.5.1 above over and above the normal vacation entitlements.

H.4.6 Nomination of Beneficiaries and Leave Payouts

H.4.6.1 An educator may, if he/she so desires, designate one or more beneficiaries to whom their leave credits may be paid in the event of their death.

H.4.6.2 If an educator dies and has not nominated a beneficiary, the leave credits may be paid:

H.4.6.2.1 In full to the spouse/life partner of that educator; or

H.4.6.2.2 If there is no spouse/life partner, in equal shares for the benefit of minor and other children (including legally adopted children) of the deceased who, at the time of her or his death, were fully dependent on the educator; or

H.4.6.2.3 If there are no children, to the educator's estate.

H.4.7 Annual leave with full pay granted in excess (office-based educators)

H.4.7.1 An educator may not be granted annual leave with full pay in excess of that which the educator has to his/her credit, including leave credit in terms of paragraph H.4.5.1 above.

H.4.7.2 If due to a bona fide error, an educator has been granted annual leave with full pay in excess of that which stood to her or his credit at that time, such over-grant must be deducted from the subsequent leave cycle.

H.4.7.3 If an educator who has been over-granted annual leave with full pay exits the service of the state, such over-grant must be regarded as an overpayment that must be recovered from her or him. The over-payment should be determined according to the following formula:

$\frac{A \times B}{260.714}$

Where –

A = represents the educator's remuneration (annual basic salary plus 37% and in the case of a member of the MMS, the all-inclusive package)

B = represents the number of days annual leave over-granted

260.714 = represents the number of working days in a year

H.5 SICK LEAVE

H.5.1 General

H.5.1.1 In the event where an educator has to –

H.5.1.1.1 Consult a doctor, therapist etc. for reasons related to the educator's health/wellness, or

H.5.1.1.2 Go for training related to disability, e.g. a blind educator who has to get training with his/her guide dog, or

H.5.1.1.3 Go for maintenance work for equipment used as a result of his/her disability, the HoD may grant such educators time off in terms of the sick leave provisions.

H.5.1.2 Where an educator is absent for a part of the day, the HoD could manually record such time off until a full day is completed as sick leave.

H.5.1.3 Fractions of sick leave entitlements may be converted using the formula in paragraph H.4.3.15.3.

H.5.2 Normal Sick Leave

H.5.2.1 Educators are entitled to 36 working days' sick leave with full pay over a three-year cycle. Unused sick leave credits shall lapse at the expiry of the three-year cycle.

H.5.2.2 It is incumbent on the educator to utilise and manage his/her normal sick leave responsibly and with circumspect.

H.5.2.3 An educator must submit his/her application for sick leave in respect of clinical procedures in advance, unless the treating practitioner certifies that such procedures have to be conducted as an emergency.

H.5.2.4 If an educator is unable to report for duty due to sudden illness, he/she must immediately notify his/her immediate supervisor of her or his inability to report for duty. An educator

must submit an application for sick leave personally or through a relative, fellow educator within 5 working days after the first day of absence.

H.5.2.5 **Medical certificates**

H.5.2.5.1 Educators who apply for three or more sick leave days must submit a medical certificate. For purposes of normal sick leave medical certificates issued and signed by the practitioners and persons who are certified to diagnose and treat patients, and who are registered with the following professional councils established by an Act of Parliament shall be accepted:

- (a) The Health Professions Council of South Africa.
- (b) The Allied Health Professions Council of South Africa.
- (c) The South African Nursing Council.

H.5.2.5.2 A medical certificate must contain the following information:

- (a) The name, address and qualifications of the practitioner or person.
- (b) The name of the patient.
- (c) The employment number of the patient (if applicable).
- (d) The date and time of examination.
- (e) Whether the practitioner is issuing the certificate as a result of personal observations during an examination received from the patient and which is based upon acceptable medical grounds.
- (f) If the patient has given informed consent for it to be disclosed, a description of the nature and extent of the illness or injury in layperson's language.
- (g) Whether the patient is totally indisposed for duty or whether the patient will be able to perform less strenuous duties in the work situation.
- (h) The exact period of recommended sick leave.
- (i) The date of issue of the certificate of illness.
- (j) A clear indication of the identity of the practitioner or person who issued the certificate.
- (k) The initial and surname in block letters, and the registration number of the practitioner who issued the certificate.

H.5.2.5.3 The HoD must accept medical certificates that do not describe the nature and extend of an educator's illness for sick leave taken during the normal sick leave cycle. The employer may

request from the educator a medical certificate describing the nature and extent of the illness before granting sick leave, if the educator abuses the system during the normal sick leave period (e.g. a pattern of regular sick leave on Mondays and Fridays).

- H.5.2.5.4 For purposes of temporary incapacity leave the employer only accepts medical certificates issued and signed by practitioners registered with the Health Professions Council of South Africa, and who are legally certified to diagnose and treat patients. Such medical certificates must describe that the illness or injury is temporary and, if the educator has given his/her informed consent, the nature and extent of the educator's illness or injury.
- H.5.2.6. If the employer establishes a pattern/trend in the educator's utilisation of normal sick leave, the employer must require the educator to submit a medical certificate from a practitioner or person listed above, for periods of sick leave absences of less than 3 days.
- H.5.2.7 If an educator in his/her first 36 days normal sick leave period, who has been absent from work on more than two occasions during an eight-week period, must regardless of the duration of the sickness or injury, submit a medical certificate stating that the educator was unable to work for the duration of the employee's absence due to sickness or injury.

Any subsequent day of absence due to sickness or injury after the above-mentioned period must then be regarded as the first day of the next 8-week period. If the educator fails to submit the required medical certificate, the head of the institution must notify the educator that if the prescribed medical certificate is not received within 2 working days, the sick leave period will be deemed to be leave without pay. If the educator fails to submit the medical certificate on time, the relevant absence must be covered by annual leave (with the educator's consent), and or unpaid leave, if insufficient annual leave credits are available, and if the educator failed to notify the head of the institution of his/her choice. Failure by the educator to submit his/her medical certificate within the stated period must be viewed in a serious light and disciplinary steps against the educator should be taken.

- H.5.2.8 If an educator falls ill whilst on annual leave with full pay, such leave may be converted to sick leave provided that a certificate from a registered medical practitioner is submitted to substantiate that he/she is ill.
- H.5.2.9 For every 15 consecutive calendar days' leave taken without pay, an employee's sick leave entitlement must be reduced by 1/72nd per sick leave cycle.
- H.5.2.10 Vacation leave without pay may not be converted into sick leave.

H.5.3 Temporary Incapacity Leave

- H.5.3.1 Incapacity leave is not an unlimited number of additional sick leave days at an educator's disposal. Incapacity leave is additional sick leave granted conditionally at the employer's discretion, and must be read with the *Policy and Procedure on Incapacity Leave for Ill-Health Retirement (PILIR)* determined by the Minister for Public Service and Administration and made applicable to educators by the Minister of Basic Education in Government Gazette No. 29248, dated 22 September 2008.

- H.5.3.2 An educator whose normal sick leave credits in a three year-cycle (36 days), have been exhausted during the prescribed sick leave cycle, and who, according to the relevant practitioner, requires to be absent from work due to a temporary incapacity may apply for temporary incapacity leave with full pay on the applicable application form prescribed by in terms of PILIR in respect of each occasion.
- H.5.3.3 For an educator's application for temporary incapacity leave to be considered, –
- H.5.3.3.1 The educator must submit sufficient proof that he/she is too ill/injured to perform his/her work satisfactorily.
- H.5.3.3.2 An application form must, regardless of the period of absence, be accompanied by a medical certificate issued and signed by a medical practitioner that certifies his/her condition as temporary incapacity and if the educator has consented, the nature and extent of the illness/injury.
- H.5.3.3.3 The educator is, in accordance with item 10(1) of Schedule 8 to the LRA, afforded the opportunity to submit, together with his/her application form –
- (a) Any medical evidence related to the medical condition of the employee, such as a medical report(s) from a specialist, blood results, x-ray results or scan results, obtained at the employee's expense; and
- (b) Any additional written motivation supporting his/her application.
- H.5.3.3.4 The educator is requested to give his/her consent that medical information/records be disclosed to the employer and/or its Health Risk Manager and to undergo further medical examinations in terms of the assessment process described in the PILIR.
- H.5.3.4 An educator must submit his/her application for temporary incapacity leave in respect of clinical procedures in advance, unless the treating medical practitioner certifies that such procedures have to be conducted as an emergency.
- H.5.3.5 If overcome by sudden illness/injury, the employee must personally notify his/her supervisor/manager immediately. A verbal message to the supervisor/manager by a relative, fellow educator or friend is only acceptable if the nature and/or extent of the illness/injury prevents the educator to inform the supervisor/manager.
- H.5.3.6 An educator must submit an application for temporary incapacity leave personally or through a relative, fellow educator or friend within 5 working days after the first day of absence.
- H.5.3.7 If the educator fails to submit an application within the prescribed 5 working days, the following measures will apply:
- H.5.3.7.1 The educator's manager/supervisor must immediately notify the employee that if such application is not received within 2 working days, the sick leave period will be deemed to be

leave without pay. If the educator fails to submit the application on time or compelling reasons why an application cannot be submitted, the supervisor/manager must immediately inform the Human Resource division and the relevant authority will approve such absence as unpaid leave or annual leave if the educator consents. The educator's supervisor/manager/HoD must within two working days from receipt of the leave application form recommend/no recommend and/or approve/disapprove the leave application and submit to the relevant Human Resource division.

- H.5.3.7.2 Failure by the educator to provide his/her application form within the stated periods, or failure by the supervisor/manager to properly manage it, must be viewed in a serious light.
- H.5.3.8 The HoD must, within 5 working days from the receipt of the educator's application for temporary incapacity leave –
- H.5.3.8.1 Conditionally grant a maximum of 30 consecutive working days' temporary incapacity leave with full pay subject to the outcome of his/her investigation into the nature and extent of the employee's illness/injury: and
- H.5.3.8.2 Refer the application with all the supporting evidence immediately to the Health Risk Manager in accordance with the PILIR for an assessment and advice –
- (a) On whether the educator's illness/injury justifies the granting of incapacity leave.
- (b) Which steps, if any, in accordance with Schedule 1 of the EEA, read with the procedures contained in item 10(1) of Schedule 8 of the LRA.
- H.5.3.9 The HoD may request the educator, if he/she has consented thereto in his/her application form, to subject him/herself for one or more medical examinations by medical practitioners of the employer's choice and for the employer's account. If the educator fails to honour the appointment for such medical examinations, the educator shall be held responsible for any fruitless expenses incurred.
- H.5.3.10 The HoD must, within 30 working days after receipt of both the application form and medical certificate, approve or refuse the temporary incapacity leave granted conditionally. In making a decision, the HoD must apply his/her mind to the medical certificate (with or without describing the nature and extent of the illness or injury) medical information/records (if the employee consented to disclosure), the Health Risk Manager's advice, the information as supplied by the educator and all other relevant information available to the HoD and based thereon approve or refuse the temporary incapacity leave granted conditionally, on conditions that the HoD may determine, e.g. return to work etc..
- H.5.3.11 The HoD may on the basis of medical evidence gathered during its investigation approve the granting of additional incapacity leave days on conditions that he/she must determine. The HoD may for this purpose grant conditionally further temporary incapacity leave.
- H.5.3.12 The HoD, if applicable and as soon as possible, must after receipt of the Health Risk Manager's advice, decide on the possibility of securing alternative employment for the

educator, or adapting his/her duties or work circumstances to accommodate his/her incapacity or alternative employment and, as soon as possible approve and implement an action plan for this purpose.

H.5.3.13 If the HoD –

H.5.3.13.1 Approves the temporary incapacity leave conditionally, such leave must be converted into temporary incapacity leave; or

H.5.3.13.2 Refuses the temporary incapacity leave granted conditionally; he/she must notify the educator in writing –

(a) Of the refusal;

(b) Of the reasons for refusal;

(c) That he/she must notify the HoD in writing within 5 working days of the date of notice to him/her whether or not the period of conditional incapacity leave must be covered by annual leave (to the extent of the available annual leave credits) or unpaid leave and that, if he/she fails to notify the HoD/DG of his/her choice, the period will be covered by unpaid leave; and

(d) The educator may, if he/she is not satisfied with the HoD's/DG's decision, lodge a grievance in terms of Chapter G of the PAM.

H.5.3.14 The HoD must cover the period of absence in accordance with the employee's written notification or, if the educator fails to notify the HoD/DG or if the annual leave credits are insufficient, the relevant period of absence must be covered by unpaid leave.

H.5.4 **Permanent Incapacity Leave** (*Policy and Procedure on Incapacity Leave for Ill-Health Retirement determined by the Minister for Public Service and Administration in terms of sec. 3(3)(c) of the Public Service Act, 1994, and made applicable to educators by the Minister of Basic Education in Government Gazette No. 29248, dated 22 September 2008.*)

H.5.4.1 An educator shall not directly access or apply for permanent incapacity leave. The HoD may grant an educator up to a maximum of 30 working days' permanent incapacity leave once he/she has, following the assessment and investigations contemplated in paragraph H.5.3.8.2 determined that the educator's condition is of a permanent nature.

H.5.4.2 The HoD must during the period referred to in paragraph H.5.3.1 and in accordance with the advice from its Health Risk Manager ascertain the feasibility of and implement its plan of action contemplated in paragraph H.5.3.12, above, in respect of –

H.5.4.2.1 Alternative employment; or

H.5.4.2.2 Adapting duties or work circumstances to accommodate the educator.

- H.5.4.3 An educator, whose degree of incapacity has been certified as permanent but who can still render a service, may be redeployed horizontally with retention of his/her benefits.
- H.5.4.4 If the redeployment necessitates reallocation to a job of a lower grading, such must be explained well in advance and the continued utilisation of such an educator should, in this regard, be with her or his consent.
- H.5.4.5 In instances where the educator's redeployment entail retraining or retooling, the employer must take requisite resources (time and financial) and potential returns into consideration before approving redeployment.
- H.5.4.6 The transfer of an educator should ensure the optimal utilisation of his/her competencies and must not compromise service delivery.
- H.5.4.7 If both the HoD and educator are convinced that the educator will never be able to render an effective service at his/her level or rank, the educator/employer may proceed with the process of termination of service on account of continued ill-health in terms of the EEA.
- H.5.4.8 The HoD may extend the period of permanent incapacity leave referred to in paragraph H.5.4.1 by a further 30 working days in order to finalise processes already commenced. If the processes set out in this Chapter are not completed within the 60 working days, the HoD must report the case to the DG of the DBE together with a report explaining the reasons for the delay.

H.6 LEAVE FOR OCCUPATIONAL INJURIES AND DISEASES

- H.6.1 An educator who, as a result of his/her work suffers occupational injuries or contract occupational diseases, shall be granted occupational injury and diseases leave for the duration of the period that he/she cannot work.
- H.6.2 If an educator suffers a work related injury as a result of an accident involving a third party, the HoD shall grant her/him occupational injury leave provided that the employee:
- H.6.2.1 Submits to the HoD medical forms as prescribed in the Occupational Injuries and Diseases Act, 1993.
- H.6.2.2 Brings his/her claim for compensation against the third party.
- H.6.2.3 Undertakes to apply for compensation for the cost arising from the accident in terms of the Compensation for Occupational injuries and Diseases Act 1993.
- H.6.3 The HoD shall take reasonable steps to assist an educator to claim compensation as set out above.
- H.6.4 When an educator is injured on duty or contracted an occupational disease the employer must pay the educator's medical expenses in terms of the provisions of the Compensation for Occupational Injuries and Diseases Act. The employer may, depending on the circumstances,

recover certain expenses in the event where a third party was involved in the accident. Please refer to the guide: "Application of The Compensation for Occupational Injuries and Diseases Act (COIDA) In The Workplace: A Guide for Government Departments" for further details

H.7 SPECIAL LEAVE FOR QUARANTINE PURPOSES

H.7.1 Special leave with full pay may be granted to an educator who has been exposed to a medical condition that requires such person to be placed under quarantine

H.7.2 Application for such leave must be accompanied by a certificate from a medical practitioner stating the period of quarantine as well as the reasons necessitating such leave.

H.8 MATERNITY LEAVE AND PRE-NATAL LEAVE

H.8.1 An educator is entitled to 4 consecutive months' maternity leave on full pay to commence at least 14 days prior to the expected date of birth but not later than the actual date of birth in a case of a premature confinement.

H.8.2 Maternity leave may be extended upon application by one or more of the following:

H.8.2.1 The granting of sick leave as a result of a medical complication.

H.8.2.2 The granting of up to 184 consecutive days unpaid leave.

H.8.2.3 The granting of annual leave, including leave accrued in terms of paragraph H.4.5 if applicable.

H.8.3 An educator who, during the third semester of her pregnancy, experiences a miscarriage, still birth or termination of the pregnancy will be eligible for six consecutive weeks paid maternity leave, where after paragraph H.8.2.1 will apply in the event of a medical complication.

H.8.4 Provisions in H.8.3 will also apply to an educator who experiences a miscarriage, still birth or termination of the pregnancy after starting paid maternity leave. The period prior to the miscarriage, stillbirth or termination of pregnancy will be regarded as special leave with full pay.

H.8.5 For at least six weeks after the birth, no educator may commence with normal official duty unless the attending practitioner certifies that the educator is fit to do so.

H.8.6 Where it is practically feasible and subject to paragraph H.8.2, an employer may allow an educator to interrupt her maternity leave by letting her return to work temporarily if the baby is hospitalised for a period longer than a month during the maternity leave due to premature birth or illness. These provisions are only applicable to an educator, who chooses to interrupt her maternity leave under these circumstances.

- H.8.7 With effect from 1 January 2013 an eligible educator will be entitled to 8 working days pre-natal leave, per pregnancy, allowing the educator to attend medical examinations by a medical practitioner or midwife, and tests related to the pregnancy.
- H.8.8 An educator can utilise a full day or part of a day for pre-natal leave.
- H.8.9 An educator must submit her application for pre-natal leave in advance, unless unforeseen circumstances prevent her from doing so. An application for pre-natal leave must be supported by reasonable proof that the educator attended a doctor's appointment and/or went for tests related to the pregnancy.
- H.8.10 An educator who has used all her pre-natal leave may, subject to the approval of the HoD or the DG as the case may be, apply to use available annual leave including capped leave and/or unpaid leave.
- H.8.11 The absence of an educator from work that relates to medical complications during pregnancy will be covered by the normal sick leave. (*Government Gazette No. 38249, dated 27 November 2014*).
- H.8.12 Three (3) working days per calendar year of paternity leave with effect from 20 May 2015, for utilisation if the employee's spouse or life-partner gives birth to a child or adopts a child not older than two (2) years. An employee who has used all his/her paternity leave may, subject to the approval of the Head of Department, apply to:
- H.8.12.1 Use his/her part or all of the five (5) working days family responsibility leave provided for in paragraph H.10.1 below; or
- H.8.12.2 Use available annual leave, including leave accrued in terms of paragraph H.4.5 above; or
- H.8.12.3 Use up to 184 days of unpaid leave. An application for paternity leave must be supported by reasonable proof. (PSCBC Resolution No. 2 of 2015).

H.9 ADOPTION LEAVE

- H.9.1 An educator, who adopts a child that is younger than two years, shall qualify for adoption leave to a maximum of 45 working days. For purposes of the interpretation and application of this provision specific attention is drawn to section 228 of the Children's Act, 2005 which stipulates that a child is adopted if the child has been placed in the permanent care of a person in terms of a court order that has the effects contemplated in section 242. Section 242 of the Children's Act, 2005 stipulates amongst others that –
- H.9.1.1. An adoption order, amongst others, confers-
- (a) full parental responsibilities and rights in respect of the adopted child upon the adoptive parent; and
 - (b) the surname of the adoptive parent on the adopted child, except when otherwise provided in the order.

H.9.1.2. An adopted child must for all purposes be regarded as the child of the adoptive parent and an adoptive parent must for all purposes be regarded as the parent of the adopted child.

H.9.2. Therefore, an eligible educator should provide the Department with a certified copy of the adoption order to access the adoption leave benefits.

H.10 SURROGACY LEAVE

H.10.1. An educator, who is a commissioning parent in terms of a surrogate motherhood agreement confirmed by the High Court as contemplated in the Children's Act, 2005, is entitled to four consecutive months paid leave commencing from the date of the birth of the child. For purposes of the interpretation and application of this provision specific attention is drawn to section 292 of the Children's Act, 2005 which stipulates that any child born of a surrogate mother in accordance with the agreement is for all purposes the child of the commissioning parent or parents from the moment of the birth of the child concerned that has the effects contemplated in section 297.

H.10.2. Section 297 of the Children's Act, 2005 stipulates amongst others that the effect of a valid surrogate motherhood agreement is that:

H.10.2.1. any child born of a surrogate mother in accordance with the agreement is for all purposes the child of the commissioning parent or parents from the moment of the birth of the child concerned;

H.10.2.2. the surrogate mother is obliged to hand the child over to the commissioning parent or parents as soon as is reasonably possible after the birth;

H.10.2.3. the surrogate mother or her husband, partner or relatives has no rights of parenthood or care of the child;

H.10.2.4. the surrogate mother or her husband, partner or relatives have no right of contact with the child unless provided for in the agreement between the parties;

H.10.2.5. subject to sections 292 and 293, the surrogate motherhood agreement may not be terminated after the artificial fertilisation of the surrogate mother has taken place; and

H.10.2.6. the child will have no claim for maintenance or of succession against the surrogate mother, her husband or partner or any of their relatives.

H.10.3. In terms of section 292 (1) of the Children's Act, 2005 no surrogate motherhood agreement is valid unless –

H.10.3.1. The agreement is in writing and is signed by all the parties thereto;

H.10.3.2. The agreement is entered into in the Republic;

- H.10.3.3. At least one of the commissioning parents, or where the commissioning parent is a single person, that person, is at the time of entering into the agreement domiciled in the Republic;
- H.10.3.4. The surrogate mother and her husband or partner, if any, are at the time of entering into the agreement domiciled in the Republic; and
- H.10.3.5. The agreement is confirmed by the High Court within whose area of jurisdiction the commissioning parent or parents are domiciled or habitually resident.
- H.10.4. Any surrogate motherhood agreement that does not comply with the provisions of this Act is invalid and any child born as a result of any action taken in execution of such an arrangement is for all purposes deemed to be the child of the woman that gave birth to that child. Therefore, an eligible employee should provide the Department with a certified copy of the surrogate motherhood agreement confirmed by the High Court to access the surrogate leave benefits.

H.11 FAMILY RESPONSIBILITY LEAVE AND SPECIAL LEAVE FOR URGENT PRIVATE AFFAIRS

- H.11.1 An office-based educator shall be granted five (5) working days leave per annual leave cycle if – (*PSCBC Resolution 1 of 2012*)
- H.11.1.1 The educator's spouse or life partner gives birth; or
- H.11.1.2 The educator's child, spouse or life partner is sick; and
- H.11.2 An office-based educator shall be granted 5 working days leave per annual leave cycle if –
- H.11.2.1 The educator's child, spouse or life partner dies; or
- H.11.2.2 The educator's immediate family member dies.
- H.11.3 The number of leave days taken in terms of paragraphs H.10.1 and H.10.2 shall, in respect of an office-based educator, not exceed ten (10) working days in an annual leave cycle, unless special circumstances warrant further leave at the discretion of the HoD.
- H.11.4 A school-based educator shall be granted 5 working days leave per annual leave cycle if –
- H.11.4.1 The educator's spouse or life partner gives birth; or
- H.11.4.2 The educator's child, spouse or life partner is sick;
- H.11.5 A school-based educator shall be granted 5 working days leave per annual leave cycle if –
- H.11.5.1 The educator's child, spouse or life partner dies; or
- H.11.5.2 The educator's immediate family member dies.

H.11.6 An institution-based educator may, during a scheduled working period, be granted special leave to attend to an urgent private matter, the nature of which is such that it warrants such an educator's absence from work.

H.11.7 The number of leave days taken in terms paragraphs H.11.4, H.11.5 and H.11-6 shall, in respect of an institution-based educator, not exceed fourteen (14) working days in an annual leave cycle, unless special circumstances related to paragraph H.11.4 and H.11.5 warrant further leave at the discretion of the HoD.

Note: The above does not imply that an educator only has four working days' leave for urgent private affairs. An educator who, for example, does not require leave for a sick child/spouse/life partner or death in the immediate family, may technically utilise all 14 working days for urgent private affairs, provided he/she satisfy the requirements with regard to urgent private affairs.

An educator who, for example, utilises 2 working days' leave for a sick child and 5 working days' leave for the death of a mother-in-law, will have 7 working days' leave for urgent private affairs or any other related leave.

H.11.8 An educator who has used all his/her leave in respect of paragraphs H.11.1, H.10.2, H.11.4 and H11.5 may apply to:

H.11.8.1 Use available annual leave, including leave accrued in terms of paragraph H.4.3; or

H.11.8.2 Use up to 184 calendar days of unpaid leave.

H.11.9 An educator shall be granted five (5) working days per calendar year of family responsibility leave with effect from 20 May 2015 for employees with children who have severe special needs. (PSCBC Resolution No. 2 of 2015).

H.11.9.1 For purposes of paragraph H.11.9, a child with severe special needs is a child who has a mental, emotional or physical disability, certified by a medical practitioner, which requires health and related services of a type or amount beyond that required by children generally.

H.11.9.2 An application for family responsibility leave shall be supported by reasonable proof to demonstrate the severe special needs of the employee's child.

H.11.9.3 If an employee has utilised all his/ her family responsibility leave, and wishes to extend the leave, he/she may, subject to approval of of the HoD, apply for:

H.11.9.3.1 Available annual leave, including leave accrued in terms of paragraph H.4.5 above; and/ or

H.11.9.3.2 Up to 184 calendar days unpaid leave.

H.11.10 Immediate family member for purposes of paragraph H.11.2.2 and H.11.5.2 means the educator's parent, adoptive parent, parents-in-law, sister- and brother-in-law, grandparent, child, adopted child, stepchild, grandchild or sibling. For the purposes of this provision

“child” means the educator’s son or daughter, and where applicable son- or daughter-in-law, of any age. The granting of family responsibility leave must be taken with due consideration of the employee’s cultural responsibilities.

H.12 SPECIAL LEAVE FOR PROFESSIONAL AND PERSONAL DEVELOPMENT AND FOR RELIGIOUS OBSERVANCES

H.12.1 Special leave with full pay may be granted to an institution-based educator –

H.12.1.1 To engage in activities aimed at his/her professional development.

H.12.1.2 To engage in activities aimed at his/her personal development where such personal development is also in the interest of the employer.

H.12.1.3 For a religious observance.

H.12.2 The total number of leave days granted to an institution-based educator in terms of paragraph H.12.1 may not exceed 3 working days per annual leave cycle.

H.13 SPECIAL LEAVE FOR STUDY PURPOSES

H.13.1 Special leave may be granted to an educator for an approved course of study and for a period approved by the employer, on conditions as approved by the employer, including leave with full or partial pay or without pay.

H.13.2 If special leave for study purposes is granted to an educator in terms of paragraph H.13.1 the employer may call for periodic progress reports in respect of the educator's studies and such educator shall enter into an agreement with the employer in a form approved by the employer in terms of which he/she undertakes to serve the employer immediately after completion of the period of special leave for study purposes for a period (hereinafter referred to as the service period) equal to at least the period for which special leave for study purposes on full pay has been granted to him or her, or for a service period proportional to the person's pay during the period of special leave for study purposes, as the case may be.

H.14 SPECIAL LEAVE FOR EXAMINATION PURPOSES

H.14.1 An educator may be granted special leave for examination purposes with full pay for each day on which such educator sits as a candidate for an examination approved for this purpose by the employer plus one additional day of special leave for study purposes for each such day of examination which may be taken on the working days immediately prior to the days of examination.

H.15 SPECIAL LEAVE FOR PARTICIPATING IN SPORTING, CULTURAL AND OTHER EVENTS

H.15.1 Special leave for a period and on conditions approved by the HoD, in terms of policy of such department, may be granted to an educator who participating in sports, cultural, and other relevant activities. Participation for which leave may be granted may include representation of the country, province or other comparable level as an actual participant, referee, adjudicator, course or group leader, or for participating in or attending a relevant conference, meeting or other event approved for this purpose by the employer.

H.16 SPECIAL LEAVE IN EXTRAORDINARY CIRCUMSTANCES

H.16.1 Subject to section 14 of the EEA and notwithstanding any disciplinary measures that may apply, unauthorised absence by an educator shall be regarded as special leave in extraordinary circumstances and shall be without pay unless the employer in a specific case determines otherwise.

H.16.2 If, in the opinion of the employer, circumstances justify it, it may grant or place an educator on special leave in extraordinary circumstances for any reasonable purpose and for any reasonable period, and such leave shall be without pay unless the employer determines otherwise.

H.17 UNPAID LEAVE

H.17.1 If an educator has utilised all her or his accrued annual leave, the HoD may grant her or him unpaid leave up to a maximum of 184 consecutive days.

H.17.2 Absences from work due to arrest, imprisonment or appearance in court on a criminal charge that leads to a conviction must be recorded as unpaid leave.

H.18 UNPAID LEAVE FOR CONTINUITY OF SERVICE

H.18.1 Unpaid leave for a maximum of 120 consecutive days may be granted to an institution-based educator who was previously employed as an institution-based educator by the same or another education department for the purpose of retaining the continuity of the educator's service.

H.18.2 The unpaid leave shall commence on the day immediately following the date on which the educator last received salary from his/her previous employer and shall expire on the day preceding the date of assumption of duty with the present employer.

H.18.3 The limitation of 120 days referred to in sub-paragraph H.18.1 shall not apply to an educator in cases where the period concerned extends from the day immediately following the last day of a term to the day immediately preceding the first day of the term after a full term has elapsed.

H.18.4 Where unpaid leave for continuity of service has been granted to an educator, the service of the educator is regarded as continuous for all purposes of determining his/her period of service.

H.19 **LEAVE PROVISIONS FOR EDUCATORS IN A TEMPORARY CAPACITY (FIXED TERM CONTRACT)** (*PSCBC Resolution 1 of 2007, Government Gazette No. 30134, dated 30 July 2007 and the Determination on leave of absence in the public service, July 2009*)

H.19.1 An educator appointed in a temporary capacity (fixed term contract) is eligible to the following types of leave on a pro rata basis linked to the duration of his/her contract:

H.19.1.1 **Annual leave**

An office-based educator appointed in a temporary capacity (fixed term contract) shall at the beginning of his/her contract period be granted annual leave that is proportional to his/her term of employment at a rate of one-twelfth of the annual leave credit applicable to the educator. Annual leave for temporary school based educators is dealt with in paragraph H.4.2.

H.19.1.2 **Normal sick leave**

An educator appointed in a temporary capacity (fixed term contract) shall at the beginning of his/her contract period be granted normal sick leave that is proportional to his/her term of employment at a rate of 1 day's normal sick leave per month of service.

H.19.1.3 **Maternity leave**

An educator appointed in a temporary capacity (fixed term contract) shall be granted paid maternity leave that is proportional to her term of contract at a rate of 10 calendar days' maternity leave with full pay calculated at each month of her term of contract to a maximum of 4 months, where after maternity leave without pay shall be granted. The total period granted in respect of maternity leave shall not exceed four consecutive months.

H.19.1.4 **Adoption leave**

A temporary educator who adopts a child that is younger than two years, shall qualify for adoption leave at a rate of 4 days paid leave for each month to a maximum of 45 working days

H.19.1.5 **Other provisions**

The terms and conditions attached to the granting of the above types of leave, as well as the provisions contained in: paragraph(s) H.4.4, H.4.6, H.5.3, H.5.4 (where applicable), H.5.2.5, H.5.2.6, H.6, H.13 and H.14 (where applicable) apply *mutatis mutandis* to an educator appointed in a temporary capacity (fixed term contract).

Annexure H.1

APPLICATION FOR LEAVE OF ABSENCE: SCHOOL BASED *EDUCATORS* (Government Gazette No 38249, 27 November 2014)

Surname:								Initials:			
PERSAL Number:								Contract Educator		Yes	No
Address during leave:		Substitute Educator		Yes	No						
		Department									
		District									
TEL/CELL:		School									
		Pay Point									
SECTION A											
Type of Leave Applied for as Working days				Start Date	End Date	Number of Working days					
Capped Leave (only applicable to educators with capped leave)											
Normal Sick Leave (this application form must not to be used for PILIR applications)											
Leave For Occupational Injuries and Diseases											
Adoption and Surrogacy Leave											
Family Responsibility Leave (Provide Evidence)											
Urgent Private Matters (for interpretation, refer to the section in the PAM)											
Pre-Natal Leave (provide evidence)											
SECTION B											
Specify Type Special Leave (the number of days are prescribed in the Leave Measures)											
Type of Leave Taken as Calendar Days/Months				Start Date	End Date	Number of Calendar Days					
Unpaid Leave (Attach Motivation)											
Maternity Leave (Attach Medical Certificate)						No. Of Calendar Months					
SECTION C: For Periods covering parts of the day or fractions											
Type of Leave Applied for as Working Days and Calendar Days (unpaid leave)				Date	Start Time	End Time	No. of Hours/Minutes				
Capped Leave (only applicable to educators with capped leave)							h	m			
Normal Sick Leave							h	m			
Family Responsibility Leave (Provide Evidence)							h	m			
Special Leave							h	m			
Urgent Private Matters							h	m			
Pre-Natal Leave											
<i>I hereby certify that the information provided is correct.</i>											
EMPLOYEE SIGNATURE				DATE							
Recommendation By Supervisor/Manager (Mark with X)											
Recommended				Not Recommended							
REMARKS (If not recommended please state the reasons & the dates in the case of rescheduling):											
MANAGER/SUPERVISOR'S SIGNATURE				DATE							

Approval by Head of Department (Mark with X)			
Approved With Full Pay	Approved Without Pay	Not Approved	
REMARKS (If approved with a change in condition of payment or not approved, please provide motivation):			
SIGNATURE OF HOD OR DESIGNEE		DATE	

SUMMARY OF INFORMATION FROM PAGE 1 (To be completed by the educator)										
Surname				Initials			PERSAL No			
Type of Leave applied for as working day	Start Date			End Date		Number of working days				
Educator Signature						Date				
Recommendation by Departmental Head (Supervisor)										
Recommended				Not Recommended						
Departmental Head / Supervisor's Signature					Date					
Approval by Head of Department or designee										
Approved Full Pay			Approved Without Pay			Not Approved				
REMARKS (If approved with a change in condition of payment or not approved, please provide motivation):										
SIGNATURE OF HOD OR DESIGNEE					DATE					
DATA CAPTURING										

CAPTURED BY _____	CAPTURED ON _____	SIGNATURE _____
CHECKED BY _____	CHECKED ON _____	SIGNATURE _____

Annexure H.2

AGREEMENT: SPECIAL LEAVE FOR STUDY PURPOSES

1 I, _____ (full name), hereby undertake towards the head of the education department of

_____ (name of education department)

immediately after expiry of the period of special leave for study purposes granted to me in terms of general education policy for the period

_____ to _____

to serve in an education department (hereinafter referred to as my service obligation) for a continuous period of _____ days.

2. I hereby further undertake, during this leave, periodically and as determined by the head of my education department to obtain progress reports in respect of my study courses from the institution at which I am studying and to submit such reports to the head of my education department, and I understand that he retains the right on the basis of such progress reports to instruct me to resume service immediately and to renounce the privileges of this leave granted to me and to convert such leave into vacation leave or special leave in extraordinary circumstances and in the latter case to recover any excess payment from me which might have occurred as a result thereof, and to transfer such payment to the education department with which this contract has been concluded.

3. I hereby declare that I understand that authorised leave with full or partial pay normally counts as service towards the fulfilment of my service obligation and that, if leave without pay is granted to me before my service obligation is fulfilled, my service obligation will be extended by the number of days equal to the periods for which leave without pay was granted to me.

4. I hereby further undertake, if in any manner whatsoever, except in the event of my death, or as a result of my permanent disability not caused by me, fail to fulfil this agreement fully, irrespective of whether such failure is the result of discharge owing to misconduct, to immediately repay on written request the service bonus and salary which I received during the above-mentioned period of special leave for study purposes on a pro rata basis together with the interest thereon at the interest rate as prescribed in the Financial Hand Book of the Department of Finance, calculated from the date of breach of contract, to the education department with which this contract has been concluded.

Signed at _____ this _____ day of _____ 20 _____

Signature of Educator: _____

WITNESSES:

1. _____

2. _____

CHAPTER I: PICKETING RULES

- I.1 INTRODUCTION**
- I.2 DEFINITIONS**
- I.3 NOTICE OF PICKET**
- I.4 CONDUCT DURING THE PICKET**
- I.5 TIMES FOR PICKETING**
- I.6 PLACE WHERE THE PICKETING IS TO BE HELD AND THE NUMBER OF PICKETERS PER DESIGNATED AREA**
- I.7 ACCESS TO THE EMPLOYER'S PREMISES OTHER THAN PICKETING**
- I.8 MODES OF COMMUNICATION BETWEEN MARSHALS AND THE EMPLOYER**
- I.9 DISCIPLINARY ACTION**
- I.10 DISPUTE RESOLUTION PROCEDURE**

ANNEXURE

Annexure I.1 Code of Good Practice: Picketing

I.1 INTRODUCTION

- I.1.1 The Department recognizes the rights of the Unions and the Employees to picket. However, picketing in the Department's premises can only be allowed if it agrees to it. It is against this principle that the Department seeks to regulate the exercise of picketing rights by the Unions and the Employees within its premises.
- I.1.2 Both parties acknowledge that the exercise of rights and the performance of obligations arising from this agreement shall not be abused so as to hinder the rendering of services by those not involved in picketing during that picketing; and
- I.1.3 That this agreement shall be legally binding on all parties identified in this agreement, therefore the parties agree as follows:
 - I.1.3.1 that only a union may authorize a picket by its members and supporters for the purposes of peacefully demonstrating –
 - (a) in support of a protected strike; or
 - (b) in opposition to any lock-out
 - I.1.3.2 that picketing may be in any place to which public has access but:
 - (a) Where a picket takes place on the premise(s) of the employer, then the permission of the employer should be obtained first; and
 - (b) that the employer may not unreasonably withhold the permission referred to in clause 4.3.2(a).

I.2 DEFINITIONS

- I.2.1 "**Labour Relations Act (LRA)**": means the Labour Relations Act 66 of 1995 as amended.
- I.2.2 "**Employer**": means the Department of Basic Educations and the nine Provincial Education Departments in terms of Section 3 of the Employment of Educators Act, No 76 of 1998 as amended.

- I.2.3 “**Lockout**”: means the exclusion by an employer of employees from the employer’s workplace, for the purposes of compelling the employees to accept a demand in respect of a matter of mutual interest between employer and employee, whether or not the employer breaches those employees’ contracts of employment in the course of or for the purpose of the exclusion.
- I.2.4 “**Strike**”: means the partial or complete concerted refusal to work, or the retardation or obstruction of work, by persons who are or have been employed by the same employer or by different employers, for the purpose of remedying a grievance or resolving a dispute in respect of any matter of mutual interest between employer and employee, and every reference to “*work*” in this definition includes overtime work, whether it is voluntary or compulsory.
- I.2.5 “**Union**”: means a registered trade union that is recognised by the employer and admitted to the Education Labour Relations Council (ELRC).
- I.2.6 “**Picketing**”: means a peaceful demonstration/s in support of a protected strike or to oppose a lockout often showing placards with their demands whilst singing, dancing and chanting at a strategic spot/s at or near their place of work.
- I.2.7 “**Workplace**”: the workplace in education for employees employed in terms of the Employment of Educators Act (EEA) at the provincial level is the nine Provincial Departments of Education and at the national level, the Department of Basic Education.
- I.2.8 “**Work station**”: means the schools / provincial or district offices as premises to where employees are stationed.

I.3 NOTICE OF PICKET

- I.3.1 That the Employer be given 7 days’ notice of the intention to picket;
- I.3.2 Such a notice to contain the following information:
- I.3.2.1 The place where picketing is intended to take place; request for such pickets to take place and the indication of the specific entrance to the institution;
- I.3.2.2 The time it will start and the time it will end;
- I.3.2.3 An estimate of the number of people who will participate in the picket;
- I.3.2.4 The name and contact person or persons for purposes of commotion, during picketing;
- I.3.2.5 The name of the organisers of the picket; and
- I.3.2.6 The names of the marshals.

I.4 CONDUCT DURING THE PICKET

- I.4.1 The code of good practice will apply (Annexure A).

I.5 TIMES FOR PICKETING

- I.5.1 The employer only permits picketing inside its premises between 09h00 – 16h00.

- I.5.2 The rationale behind these times is to ensure that no victimization and intimidation on the non-striking persons and or other persons leaving and or entering the Department's premises.
- I.5.3 Picketing outside of the above times, can be done outside of the Department's premises.
- I.5.4 Picketing within the school premises during school hours will be limited to before and after school starts and ends and during school intervals in order not to disrupt teaching and learning of the students.

I.6 PLACE WHERE THE PICKETING IS TO BE HELD AND THE NUMBER OF PICKETERS PER DESIGNATED AREA

- I.6.1 Permission to picket outside of the Department's premises must be obtained from the Local Municipality.
- I.6.2 Picketing at the Department's offices (National, Provincial, Regional, circuit or local) must be five (5) meters from the main entrance.
- I.6.3 In order to allow easy access to non-striking employees, delivery trucks and all other vehicles and persons leaving and or entering the Department's premises, Picket Marshals must keep pathways including the side walk clear of any obstruction.
- I.6.4 Picketing will only be allowed in the designated areas:
 - a) Five (5) meters from the Main Door, by an unlimited number of Employees;
 - b) In the car park, or any place at the Department's premises, agreed to by the parties;
- I.6.5 If there are any petitions to be handed over, a time for such hand over will be agreed to by the Unions and the Department on the morning of the day of the hand over.

I.7 ACCESS TO THE EMPLOYER'S PREMISES OTHER THAN PICKETING

- I.7.1 The employer will provide picketers with access to toilet facilities in a designated area, subject to picketers conducting themselves in an orderly and lawful manner.

I.8 MODES OF COMMUNICATION BETWEEN MARSHALS AND THE EMPLOYER

- I.8.1 Marshals shall call the Departmental representative on their cell phones and / or shall request the Security Officers at the main gate to call designated members of the management team where and when a need arises.

I.9 DISCIPLINARY ACTION

- I.9.1 No disciplinary action shall be taken against any persons merely participating in a picket that is in accordance with the provisions of the LRA.
- I.9.2 Should those participating in a protected picket commit misconduct in the course of a protected picket line, the employer will be entitled to take disciplinary action in terms of the EEA against those responsible for such misconduct.
- I.9.3 The employer shall wait until the picket is over before instituting disciplinary action.

I.9.4 If the misconduct was conducted by a union official, the provisions in the LRA applies.

I.10 DISPUTE RESOLUTION PROCEDURE

I.10.1 Any dispute about the interpretation or application of this collective agreement shall be resolved in terms of the dispute resolution procedure of the ELRC.

ANNEXURE I.1

CODE OF GOOD PRACTICE: PICKETING

1 Introduction

- (1) This code of *good practice* is intended to provide practical guidance on picketing in support of any protected *strike* or in opposition to any *lock-out*. It is intended to be a guide to those who may be contemplating, organising or taking part in a picket and for those who as *employers or employees* or members of the general public that may be affected by it.
- (2) Section 17 of the Constitution recognises the right to assemble, to demonstrate, to picket and to present petitions. This constitutional right can only be exercised peacefully and unarmed. Section 69 of the Labour Relations Act, No. 66 of 1995, seeks to give effect to this right in respect of a picket in support of a protected *strike* or a *lock-out*.
- (3) This code does not impose any legal obligations and the failure to observe it does not by itself render anyone liable in any proceedings. But section 69(5)(d) of *this Act* provides that the *Commission* must take account of this code of *good practice* when it establishes picketing rules.
- (4) Any person interpreting or applying *this Act* in respect of any picket must take this code of *good practice* into account. This is the effect of section 203 of *this Act*. This applies to the *Commission*, Labour Court, the Labour Appeal Court, and the South African Police Services.
- (5) This code does not apply to all pickets and demonstrations in which employees and trade unions may engage. It applies only to pickets held in terms of section 69 of *this Act*. That section has four elements:
 - (a) The picket must be authorised by a registered *trade union*;
 - (b) Only members and supporters of the *trade union* may participate in the picket;
 - (c) The purpose of the picket must be to peacefully demonstrate in support of any protected *strike* or in opposition to any *lock-out*;
 - (d) The picket may only be held in a public place outside the premises of the employer or, with the permission of the employer, inside its premises. The permission of the employer is subject to overrule by the CCMA, if such permission is unreasonably denied.
- (6) If the picket complies with these four elements, then the ordinary laws regulating the right of assembly do not apply. These laws include the common law, municipal by-laws and the Regulation of Gatherings Act, 205 of 1993.
- (7) A picket with purposes other than to demonstrate in support of a protected strike or a *lock-out* is not protected by *this Act*. The lawfulness of that picket or demonstration will depend on compliance with the ordinary laws.

2. Authorisation

- (1) A picket contemplated in section 69 of *this Act* must be authorised by a registered *trade union*. The authorisation must be made in accordance with the *trade union's* constitution. That means that there must either be a resolution authorising the picket or a resolution permitting a *trade union official* to authorise a picket in terms of section 69(1). The actual authorisation should be formal and in writing. A copy of the resolution and, if necessary, the formal authorisation ought to be served on the *employer* before the commencement of the picket.
- (2) The authorisation applies only to its members and its supporters.

3. Purpose of the picket

- (1) The purpose of the picket is to peacefully encourage non-striking employees and members of the public to oppose a *lock-out* or to support strikers involved in a protected *strike*. The nature of that support can vary. It may be to encourage employees not to work during the strike or lock-out. It may be to dissuade replacement labour from working. It may also be to persuade members of the public or other employers and their employees not to do business with the employer.
- (2) *The strike* must be a protected *strike*. In normal cases, employees picket at their own place of work in support of their *strike* against their own employer. Cases do arise, however, where employees picket at their own place of work in support of a *strike* between another employer and its employees. This is what is contemplated in section 66 as a "secondary strike". In this case, in order to be protected, the picket must further satisfy the requirements of a lawful secondary *strike* in terms of section 66 of *this Act*. This is because the definition of "secondary *strike*" in section 66 includes "conduct in contemplation or furtherance of a *strike*". A picket is "conduct in contemplation or furtherance of a *strike*."
- (3) The requirements for a protected secondary strike are-
 - (a) *the strike* that is to be supported by the secondary *strike* must itself be a protected *strike*;
 - (b) the employer of the employees taking part in the secondary strike must have received written notice of the proposed picket at least 7 days prior to its commencement; and
 - (c) the nature and extent of the secondary strike must be reasonable in relation to the possible direct or indirect affect that the secondary strike may have on the business of the primary employer.
- (4) If a picket is in support of an unprotected *strike*, the picket is not protected by section 69 of *this Act*.
- (5) Pickets may be held in opposition to a *lock-out*. Section 69(1) does not distinguish between protected and unprotected lockouts. This means that a picket may be authorised and held in opposition to a protected or an unprotected *lock-out*.

4. Picketing rules

- (1) The registered trade union and employer should seek to agree to picketing rules before the commencement of the strike or picket.
- (2) A collective agreement may contain picketing rules. When they negotiate an agreement the following factors should be considered-
 - (a) the nature of the authorisation and its service upon the employer;
 - (b) the notice of the commencement of the picket including the place, time and the extent of the picket;
 - (c) the nature of the conduct in the picket;
 - (d) the number of picketers and their location;
 - (e) the modes of communication between marshals and employers and any other relevant parties;
 - (f) access to the employer's premises for purposes other than picketing e.g. access to toilets, the use of telephones, etc.;
 - (g) the conduct of the pickets on the employer's premises; and
 - (h) *this code of good practice*.
- (3) The factors listed in subparagraph (2) apply to the determination of picketing rules by a commissioner.

5. Pickets on the employer's premises

- (1) A picket may take place on the employer's premises with the permission of the employer. The permission may not be unreasonably withheld. In order to determine whether the decision of the employer to withhold the permission is reasonable, the factors which should be taken into account include-
- (a) the nature of the workplace e.g. a shop, a factory, a mine etc.;
 - (b) the particular situation of the workplace e.g. distance from place to which public has access, living accommodation situated on employer premises, etc.;
 - (c) the number of employees taking part in the picket inside the employer's premises;
 - (d) the areas designated for the picket;
 - (e) time and duration of the picket;
 - (f) the proposed movement of persons participating in the picket;
 - (g) the proposals by the trade union to exercise control over the picket;
 - (h) the conduct of the picketers.

6. Conduct in the picket

- (1) The registered *trade union* must appoint a convenor to oversee the picket. The convenor must be a member or an official of the *trade union*. That person should have, at all times, a copy of section 69 of *this Act*, a copy of these guidelines, any *collective agreement* or rules regulating pickets and a copy of the resolution and formal authorisation of the picket by the registered *trade union*. These documents are important for the purposes of persuading the persons participating in the picket to comply with the law. These documents may also be important to establish the lawfulness and the protected nature of the picket to the employer, the public and in particular to the police.
- (2) The convenor must notify the employer, the responsible person appointed in terms of section 2(4)(a) of the Regulation of Gatherings Act, 1993 and the police of the intended picket. The notice should contain:
- (a) notification that the picket is in compliance with section 69 of this Act;
 - (b) the name, address and telephone number of the trade union and the convenor;
 - (c) details of the picket, including the details of the employer being picketed, the date of the commencement of the picket, the location of the picket, etc.
- (3) The employer must, on receipt of the notification, provide the convenor with the name, address and telephone number of the person appointed by the employer to represent it in any dealings arising from the picket.
- (4) The registered *trade union* should appoint picket marshals to monitor the picket, they should have the telephone numbers of the convenor, the *trade union* office and any persons appointed to oversee the picket, in the absence of the convenor. The marshals should wear arm bands to identify themselves as marshals. The trade union should instruct the marshals on the law, any agreed picketing rules or where no agreed rules exist any picketing rules that have been stipulated by the CCMA, this Code of Conduct and the steps to be taken to ensure that the picket is conducted peacefully.
- (5) Although the picket may be held in any place to which the public has access, the picket may not interfere with the constitutional rights of other persons.
- (6) The picketers must conduct themselves in a peaceful, unarmed and lawful manner. They may-
- (a) carry placards;
 - (b) chant slogans; and
 - (c) sing and dance.
- (6) Picketers may not –

- (a) physically prevent members of the public, including customers, other employees and service providers, from gaining access to or leaving the employers premises;
- (b) commit any action which may be unlawful, including but not limited to any action which is, or may be perceived to be violent.

7. Role of the police

- (1) It is not the function of the police to take any view of the merits in particular of the dispute giving rise to a *strike* or a *lock-out*. They have a general duty to uphold the law and may take reasonable measures to keep the peace whether on the picket line or elsewhere.
- (2) The police have no responsibility for enforcing the Labour Relations Act. An employer cannot require the police to help in identifying pickets against whom it wishes to seek an order from the Labour Court. Nor is it the job of the police to enforce the terms of an order of the Labour Court. Enforcement of an order on the application of an employer is a matter for the courts and its officers, although the police may assist officers of the court when there is a breach of the peace.
- (3) The police have the responsibility to enforce the criminal law. They may arrest picketers for participation in violent conduct or attending a picket armed with dangerous weapons. They may take steps to protect the public if they are of the view that the picket is not peaceful and is likely to lead to violence.

8. General rights, obligations and immunity

- (1) A person who takes part in a picket protected in terms of *this Act* does not commit a delict or a breach of contract. This means that the employer may not sue a person or a union for damages caused by a picket.
- (2) The employer may not take disciplinary action against an employee for participating in a lawful picket. Where the employee's conduct during a picket constitutes misconduct the employer may take disciplinary action in accordance with the provisions of this Act.

CHAPTER J: EDUCATION MANAGEMENT SERVICE (EMS): PERFORMANCE MANAGEMENT AND DEVELOPMENT SYSTEM (PMDS) FOR OFFICE-BASED EDUCATORS

SECTION A

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SECTION A: INFORMATION RESOURCE PACK

ACRONYMS

CMC	Core Management Criteria
DBE	Department of Basic Education
EMS	Education Management Service
EMS: PMDS	Education Management Service: Performance Management and Development System
EA	Executing Authority
EEA	Employment of Educators Act, 1998
ELRC	Education Labour Relations Council
HOD	Head of Department
HRD	Human resource development
HRM	Human resource management
KRA	Key result area
MEC	Member of the Executive Council
MMS	Middle Management Service (as from 1 July 2005)
PA	Performance agreement
PDP	Personal development plan
PFMA	Public Finance Management Act, 1999
PMDS	Performance Management and Development System
PSC	Public Service Commission
PSCBC	Public Service Co-ordinating Bargaining Council
PSR	Public Service Regulations, 2001

GLOSSARY OF TERMS

Annual performance assessment: The final performance assessment or review of an employee that takes place at the end of the performance cycle. The result of this particular assessment is the overall annual performance score for the employee.

Assessment instrument: A single performance assessment tool that is used to assess the performance of an individual employee in relation to the achievement of key result areas and core management criteria as contained in the work plan of the performance agreement.

Attribute: An attribute is generally defined to consist of motives, traits and self-concept.

Core Management Criteria (CMC): An element of knowledge, skill, or attribute that is directly related to effective performance in a job.

Department: The Department of Education (A Department as defined in section 1 of the Public Service Act, 1994).

Development: Training and development activities to enhance the employee's competencies and to improve performance.

Education Management Service: Employees who are office based educators on salary levels 8 to 12.

Executive Authority: Minister or Member of the Executive Council.

Feedback: Objective and timely information by the manager/supervisor on the employee's performance against set expectations and standards, understood by the employee, and aimed at improving performance

Grievance rules: The rules for dealing with the grievances of employees in Education, as contained in the Administrative Administration Measures.

Key Result Area (KRA): An area of a job in which performance is critical for making an effective contribution to the achievement of departmental strategies, goals and objectives

Moderation: The review of employee assessment scores by a committee to ensure that they are consistent, fair and equitable across the department through a common understanding of the performance standard required at each level of the rating scale.

Operational plan(s): This one-year plan is derived from and gives life to the strategic plan by translating the strategic objectives identified in the strategic plan into key result areas and activities with measurable standards, for a particular year for both the Department and components (schools).

Outcome: A broad statement about a specific objective, aim or intent, the achievement of which will require one or more specific outputs to be achieved.

Output: A concrete result or achievement (i.e. a product, action or service) that contributes to the achievement of a key result area.

Performance: Human performance involves (1) people's behaviour or actions, and (2) the outcomes or effects of those actions. Performance is a process in which resources are used in an effective, efficient and productive way to produce results that satisfy requirements of time, quality and quantity, and which are the effect or outcome of the actions or behaviour of a performer in the work process.

Performance agreement: A document agreed upon and signed by an employee and her or his supervisor, which includes a description of the job, selected KRAs and CMCs, a work plan and the employee's personal development plan.

Performance assessment: The measurement, assessment, rating or appraisal of employee performance.

Performance cycle: A 12-month period for which performance is planned, managed and assessed. It must be aligned to the same period as the Department's annual business plan i.e. 1st April to 31st March of the following year.

Personal development plan (PDP): A requirement of the performance agreement whereby the important competency and other developmental needs of the employee are documented, together with the means by which these needs are to be satisfied and which includes time lines and accountabilities.

Performance indicator: A measure used to gauge the extent to which an output has been achieved (policy developed, presentation delivered, service rendered).

Performance management: A purposeful, continuous process aimed at positively influencing employee behaviour for the achievement of the organisation's strategic goals; the determination of the correct activities as well as the evaluation and recognition of the execution of tasks/duties with the aim of enhancing their efficiency and effectiveness; and a means of improving results from the Department, teams and individuals by understanding and managing performance within an agreed framework of planned goals, objectives, standards and support incentives.

Performance standard: Mutually agreed criteria to describe work in terms of time-lines, cost and quantity and/or quality to clarify the outputs and related activities of a job by describing what the required result should be. In this framework, performance standards are divided into indicators and the time factor.

Performance review: A structured and formal, at least half-yearly, discussion between supervisor and employee to monitor progress, resolve problems and adjust work plans during the performance cycle, thereby providing an opportunity for improvement before the annual review takes place. If the employee's performance is unsatisfactory or needs to improve or unsatisfactory, the half-yearly review must be in writing.

Rating: The allocation of a score to a KRA, a CMC and/or to overall performance in accordance with the five-point rating scale of the EMS PMDS.

Strategic planning: This is the process by which top management determines the overall strategic direction and priorities, as well as the organisational purpose and objectives and how they are to be achieved.

Strategic plan: The end product of strategic planning, setting out the mission and vision statements and the medium and long-term strategic objectives of the Department. The contents of the strategic plan must be in compliance with the requirements of Chapter 5 of the Treasury Regulations, 2001, and Chapter 1 Part III.B of the Public Service Regulations, 2001.

Supervisor: An official responsible for the allocation of work, monitoring of activities, discussing performance and development, and the performance review and assessment of an employee.

Work plan: A document which is part of the performance agreement and which contains key result areas, associated outputs/activities and their performance standards and resource requirements.

1 INTRODUCTION

The EMS Performance Management and Development System has been designed for use to assist with performance management of office based educators at national or Provincial Education Department.

Key role-players in the performance management process are identified. The term “*component*” is used as a generic title for any sub-division of a department.

The EMS PMDS provides a standardised framework for employee performance in a department for office based educator.

Three main levels are involved at:

a) Organisational or Departmental level (*Strategic level*)

The Executing Authority and the HoD determine the strategic priorities and overall key result areas of the department. Objectives are identified for the priorities and assigned to components within the department.

b) Departmental level (*Operational level*)

Components undertake the execution of projects and activities that lead to the achievement of the integrated strategic plans.

c) Employee level (*Implementation level*)

Each employee develops a performance agreement jointly with her or his supervisor.

Key requirements for the successful implementation of the EMS PMDS are the following:

- The institutional framework determines responsibilities for specific aspects of the EMS PMDS. With the Strategic Plan as a basis, the department is able to identify priorities and specific objectives to be achieved by various components. Performance Agreements for all employees enable the department to assign specific performance objectives and targets to its employees. This also enables employees in the department to participate meaningfully in the management of their own performance.
- Another key requirement for the successful implementation of the EMS PMDS is training on the system. Managers, supervisors and employees must be trained in the mechanics of the system and areas such as communication, problem-solving and conflict resolution in order to manage the system more effectively. The training of supervisors in particular is of the utmost importance, and this should result in supervisors knowing how to implement the system, ensuring that employees receive adequate training and possess sufficient information to be able to fully participate in the processes. This must be done with the support and co-operation of the HR unit in a Department.

2 SCOPE AND APPLICATION

The EMS PMDS applies to all office based educators at national or Provincial Education Department, regardless of seniority or qualification, and who are appointed in terms of the Employment of Educators Act, 1998.

As an employee performance management system, the EMS PMDS is not applicable to departmental, component or team performance management or assessment.

3 SOURCES OF AUTHORITY

The specific sources of authority for employee performance management are:

- a) The Constitution of the Republic of South Africa, 1996
- b) The Employment of Educators' Act, 1998, as amended
- c) The Personnel Administrative Measures
- d) The Skills Development Act (Act 97 of 1998)
- e) The Labour Relations Act (Act 66 of 1995)
- f) Promotion of Equality and Prevention of Unfair Discrimination Act, (Act 4 of 2000)
- g) Promotion of Access to Information Act (Act 2 of 2000)
- h) Employment Equity Act (Act 55 of 1998)
- i) Public Finance Management Act, 1999
- j) MMS Performance Management and Development System (1 April 2002)
- k) Promotion of Administrative Justice Act, 2000
- l) White Paper on Transformation of the Public Service, 1995
- m) White Paper on Human Resource Management, 1997
- n) White Paper on Affirmative Action, 1998
- o) White Paper on Transforming Public Service Delivery (Batho Pele), 1997
- p) White Paper on Public Service Training and Education, 1998
- q) Treasury Regulations, 2001
- r) Relevant collective agreements
- s) Relevant directives and departmental policies

4 GOAL, OBJECTIVES AND PRINCIPLES OF PERFORMANCE MANAGEMENT

4.1 Goal

EMS PMDS as a performance management system is aimed at improving employee performance. The aim of performance management is to optimise every employee's output in terms of quality and quantity, thereby increasing the departments' overall performance.

4.2 Objectives

To achieve individual excellence and achievement, the objectives for performance management are to –

- a) establish a performance and learning culture in the workplace;
- b) improve service delivery;
- c) ensure that all employees know and understand what is expected of them;
- d) promote interaction on performance between employees and their supervisors;
- e) identify, manage and promote employees' development needs;
- f) evaluate performance fairly and objectively; and

- g) identify and manage categories of performance that are rated as “*performance needs to improve*” and “*unsatisfactory performance*”.

4.3 Principles

The key principles underpinning effective performance management are the following

- a) Departments shall manage performance in a consultative, supportive and non-discriminatory manner to enhance organisational efficiency and effectiveness, accountability for the use of resources and the achievement of results.
- b) Performance management processes shall link to broad and consistent staff development plans and align with the department's strategic goals.
- c) Performance management processes shall be developmental, and shall allow for recognising competent performance, and for an effective response to performance that is consistently rated as “*performance needs to improve*” and “*unsatisfactory performance*”.
- d) Performance management procedures should minimise the administrative burden on both employees and their supervisors while maintaining transparency and administrative justice.

5 THE PERFORMANCE CYCLE

Performance management at the employee level is an on-going interactive process between an employee and her/his supervisor about the employee's performance. Face-to-face on-going communication is an essential requirement of the process and covers the full performance cycle. For effectiveness of operation the cycle is divided into integrated phases or elements of –

- a) Performance planning and agreement;
- b) Performance monitoring, developing and control;
- c) Performance assessment or appraisal; and
- d) Managing the outcomes of assessment

The performance cycle is a 12-month period for which performance is planned, executed and assessed. It must be aligned to the same period as the Department's annual planning cycle i.e. 1st April to 31st March of the following year. The probation cycle is however linked to the appointment date of employees.

6 PERFORMANCE PLANNING AND AGREEMENT

6.1 The Performance Agreement

6.1.1 Content of a performance agreement

The performance agreement (PA) is the cornerstone of performance management at the individual level. All employees are required to enter into and sign performance agreement with their immediate supervisor, preferably within one month after the start of the new cycle.

The content of a PA must include the following (refer to **Annexure A**):

- a) **Employee data** such as the Persal number, job title and salary level etc. as well as a clear job description of the employee, with emphasis on the main objectives, job purpose and the relevant KRAs and CMCs.
- b) **A work plan** containing the KRAs, outputs, activities and resource requirements. (Refer to **Annexure B**)
- c) **A personal development plan (PDP)** that identifies the competence and other developmental needs of the employee, as well as methods to improve these.

6.1.2 Effecting Changes to the Performance Agreement

The employee and his/her immediate supervisor may agree to alter an existing agreement, or enter into a new one during the performance cycle. This is permissible under the following circumstances:

- a) if the employee changes jobs during the cycle;
- b) if the employee is absent from his/her job for a period of three months or more due to maternity, ill health, study, secondment, travel or any other reason that is acceptable.

If it is known to the employee that he/she will be absent from his/her job for a longer period during the cycle prior to the signing of the performance agreement, such period of absence should be provided for in the original agreement.

Should it be necessary for a new agreement to be signed, such an agreement should take into account the previous work done and new responsibilities to be undertaken if any.

A performance agreement without a completed and signed work plan should be regarded as invalid and of no use in the performance management process.

6.2 The work plan

While the performance agreement is the cornerstone of performance management at the individual level, the work plan contains the essence of the performance agreement (see the Guide to the Work plan and template in **Annexure B**). The work plan describes what an employee is going to achieve within particular time frames, and consists of the following:

6.2.1 Key Results Areas (KRAs):

- a) These describe what is expected from an employee in terms of his/her job description and focus attention on actions and activities that will assist components and ultimately the department in performing effectively. In the work plan, the KRAs should be broken down into key activities/outputs, time frames, performance indicators as well as enabling conditions/ contextual factors. These are used to indicate how the performance/achievement of the outputs and activities will be measured. KRAs can cover many different aspects of the work such as –
 - i. Specific tasks or events which the employee should ensure are achieved;

- ii. Levels of performance which the employee should maintain and promote;
 - iii. Actions or situations for which the employee is personally responsible for delivering his/her "*unique contribution*"; and
 - iv. Duties and responsibilities related to advice and support given,
- b) Each KRA should be broken down into measurable outputs and/or duties/responsibilities and activities. Each KRA should be weighted (in %) according to the importance it has in the employee's/member's job. The weighting of all the KRAs should add up to 100. No individual KRA may be given a weighting of less than 5% or more than 20%. The weighting should be in multiples of 5.

6.2.2 Core Management Criteria (CMCs)

- a) These are elements and standards used to describe and assess performance, taking into consideration knowledge, skills and attributes. The CMCs are used to calculate 30% of the employee's assessment score. There are 7 CMCs that are compulsory.
- b) 60% of the weighting has been prescribed for 4 of the 7 CMCs. The weighting for the remaining 3 CMCs will be agreed upon between the supervisor and the employee.
- c) The prescribed weighting for the 4 CMCs for office based educators is fixed as follows:
- i. Job knowledge and application (20)
 - ii. Leadership abilities (20)
 - iii. Interpersonal relationships (10)
 - iv. Service to stakeholders (10)
- d) The weighting for each of the remaining 3 CMCs will be agreed to by the supervisor and the employee. These CMCs are:
- i. Communication
 - ii. Acceptance of responsibility
 - iii. Conceptual and analytical skills
- e) One way of jointly arriving at decisions on the weighting of a specific CMC is to use the factors of impact and frequency.
- f) The greater the impact and frequency, the greater the importance that criterion is likely to have on the achievement of effective performance results. The weighting of all the CMCs should add up to 100.
- g) No individual CMC may be given a weighting of less than 5% or more than 20%. The weighting should be in multiples of 5.

6.2.3 Calculating the final score

In calculating the final score, each employee must be assessed against both KRAs and CMCs. KRAs covering the main areas of work will account for 70% of the final assessment, while the CMCs make up the other 30% of the assessment score.

6.3 Personal Development Plan (PDP)

- a) The purpose of the personal development plan is to:
 - i. identify any performance output shortfall in the work of the employee, either historical or anticipated.
 - ii. relate this to a supporting CMC shortfall.
 - iii. plan and implement a specific set of actions to reduce the gap. (The competency gap may relate to any of the CMCs included in this EMS PMDS or any other area of the employee's knowledge, skill and attribute requirement.)
- b) The PDP should include interventions relating to the technical or occupational "hard skills" of the job, through e.g.
 - i. appropriate training interventions,
 - ii. on-the-job training,
 - iii. expanded job exposure,
 - iv. job rotation.
- c) The employee and the supervisor are required to take joint responsibility for the achievement of the PDP with allocated accountabilities clearly recorded on the PDP

7 PERFORMANCE MONITORING, REVIEW AND ASSESSMENT

7.1 Performance monitoring

Performance at the individual level must be continuously monitored to enable the identification of performance barriers and changes and to address development and improvement needs as they arise, as well as to –

- a) determine progress and/or identify obstacles in achieving objectives and targets;
- b) enable supervisors and employees to deal with performance-related problems;
- c) identify and provide the support needed;
- d) modify objectives and targets; and
- e) ensure continuous learning and development.

7.2 Performance review and assessment

- a) Performance review meetings are an integral part of the monitoring process. These reviews must take place as often as is practicable and/or required by circumstances. The reviews are necessary to motivate and to reveal to the employee areas that need improvement and if required, to modify the PA.
- b) The supervisor should use all opportunities to discuss the employee's performance, including meetings, report backs, and informal discussions. An employee's supervisor shall monitor the employee's performance on a continuous basis and give him/her feedback on his/her performance: at least four times a year - orally, if the employee's performance is rated as 'competent' and above); and in writing if performance needs to improve and unsatisfactory; at least twice during

the six months preceding the employee's annual formal performance assessment; and in writing, on the annual formal performance assessment date.

7.2.1 Preparations for performance review and assessment

a) The Supervisor

The supervisor should prepare by –

- i. reviewing the previous period and objectives and targets for the next period;
- ii. reviewing support needed and drafting training and development needs;
- iii. seeking appropriate feedback from relevant role-players to support the process;
- iv. reviewing and updating all relevant documentation; and
- v. identifying internal/external factors affecting the employee's performance.

b) The Employee

The employee should prepare by –

- i. reviewing previous objectives and identifying possible new objectives and targets;
- ii. collecting supporting facts on performance delivered;
- iii. identifying factors that affected his/her performance;
- iv. identifying support that will be needed as well as possible training and development needs; and
- v. reflecting on the feedback to be given to the supervisor.

7.2.2 Performance review and assessment cycle

- a) **April – June:** This constitutes the period of the first review process. Feedback may occur orally if the employee's performance is rated at "*competent*" or above, or in writing if it is rated as "*performance needs to improve*" and "*unsatisfactory performance*".
- b) **July – September:** This is the period of the second review process, and constitutes a "*midterm review*". Feedback during the midterm review should under all circumstances be in writing. Outcomes of this process should be signed by both parties.
- c) **October – December:** This constitutes the period of the third review process. Feedback may occur orally if the employee's performance is rated at "*competent*" or above, or in writing if it is rated as "*performance needs to improve*" and "*unsatisfactory performance*".
- d) **January – March:** This is the period of the final process in the cycle and constitutes an "*annual performance assessment*". Feedback during the annual review should under all circumstances be in writing. Outcomes of this process should be signed by both parties. The final assessment discussion must take place at the end of the performance cycle and coincides with the end of the financial year, i.e. March of each year. The assessment score for the employee's performance is the total of the individual KRA (70%) and CMC (30%) assessment scores.

7.2.3 Performance review and assessment discussion

- a) The review and assessment discussion must enable and/or afford –
- i. An employee an opportunity to assess his/her own performance and its contribution to organisational goals and to identify areas of improvement;
 - ii. the supervisor an opportunity to provide formal feedback on performance over the year and to identify ways of improving what was achieved;
 - iii. An employee an opportunity to contribute to, and respond to comments regarding his/her performance and identify issues beyond his/her control that limit the achievement of results;
 - iv. An open discussion between the employee and his/her supervisor in which achievements can be fully recognised and ideas for problem solving agreed;
 - v. An opportunity for a discussion and agreement on an overall assessment score reflecting judgement on the level of achievement attained in terms of the performance agreement; and
 - vi. An opportunity for the supervisor and the employee to agree on areas of personal development.

7.3 Performance assessment instruments

The annual / mid-year assessment instruments applicable to **office based educators** (Refer to **Annexure D**).

The same assessment instrument is used to assess the performance of all individual KRAs and CMCs, as well as the overall performance of the employee. It is the overall performance assessment score that is to be used as the basis of deciding the performance assessment outcome for the employee. The performance review and annual assessment of employees will be based on the following **ratings**:

RATING	CATEGORY	DESCRIPTION
1	UNSATISFACTORY PERFORMANCE	Performance does not meet the standard expected for the job. The review/assessment indicates that the employee has achieved less than competent results against almost all of the performance criteria and indicators as specified in the Performance Agreement and Work plan.
2	PERFORMANCE NEEDS TO IMPROVE	Performance meets some of the standards expected for the job. The review/assessment indicates that the employee has achieved less than competent results against more than half of the performance criteria and indicators as specified in the Performance Agreement and Work plan.
3	COMPETENT	Performance fully meets the standard expected in all areas of the job. The review/assessment indicates that the employee has achieved as a minimum effective results against all of the performance criteria and indicators as specified in the Performance Agreement and Work plan.
4	GOOD PERFORMANCE	Performance is significantly higher than the standard expected in the job. The review/assessment indicates that the employee has achieved better than competent results against more than half of the performance criteria and indicators as specified in the Performance Agreement and Work plan and fully achieved all others throughout the performance cycle.

RATING	CATEGORY	DESCRIPTION
5	EXCELLENT PERFORMANCE	Performance far exceeds the standard expected of a jobholder at this level. The review/assessment indicates that the employee has achieved better than competent results against all of the performance criteria and indicators as specified in the PA and Work plan and maintained this in all areas of responsibility throughout the performance cycle

The annual performance assessment process involves:

- a) **Assessment of the achievement of results (KRAs) outlined in the work plan**
 - i. Each KRA must be assessed on the extent to which the specified standards have been met and outputs achieved.
 - ii. An indicative rating on the five-point scale must be provided for each KRA.
 - iii. This rating must be multiplied by the weighting given to the KRA as per the performance agreement, to provide a score.
 - iv. The rating calculator can be used to add the scores and calculate a final KRA score, based on the 70% weighting allocated to the KRAs.
- b) **Assessment of the CMCs**
 - i. Each CMC must be assessed according to the extent to which the specified standards have been met.
 - ii. An indicative rating on the five-point scale must be provided for each CMC.
 - iii. This rating must be multiplied by the weighting given to each CMC as per the performance agreement, to provide a score.
 - iv. The rating calculator may then be used to add the scores and calculate a final CMC score, based on the 30% weighting allocated to the CMCs.
- c) **Overall rating**
 - i. An overall score in accordance with the assessment rating is provided as a summary of the outcome of the performance review for KRAs and CMCs.
 - ii. The assessment rating calculator may then be used to provide a final score based on adding the scores achieved for the KRAs and the CMCs.

7.4 Moderation

7.4.1 Purpose of moderation

The purpose of moderation is to ensure, as far as possible, that supervisors are evaluating performance in an equitable and consistent manner across the department, with a common understanding of the standard required at each level of the rating scale.

7.4.2 Structures involved in the moderation process

- a) **National level:** A single moderation committee will be established.
- b) **Provincial Level:** Each province will establish a moderation committee.
- c) **District Level:** Sub-committees will be established by the provincial moderation committee.

7.4.3 Composition of the Moderation Committee

a) National Level:

The national moderation committee will be established by the Director-General in consultation with Senior Management. The committee will consist, amongst others, of the following:

- i. Head of Human Resource Management (Chairperson);
- ii. Two (2) representatives from senior management; and
- iii. EMS PMDS coordinator

b) Provincial Level:

The provincial moderation committee should be established by the Head of Department (HOD) in consultation with senior management. The committee will consist, amongst others, of the following:

- i. Head of Human Resource Management (Chairperson);
- ii. Two (2) representatives from senior management; and
- iii. PMDS coordinator.

c) District Level:

The District Director will be responsible for the establishment of a moderation sub-committee at district level. The sub-committee will consist, amongst others, of the following:

- i. District Director (Chairperson)
- ii. Two (2) representatives from the district management team; and
- iii. PMDS coordinator.

7.4.4 Functions of the Moderation Committee

a) National and Provincial Level:

The functions of the moderation committee will be to:

- i. Ensure that there is compliance in terms of the applicable policy/collective agreement.
- ii. Provide oversight of the EMS PMDS, especially ensuring that the process for setting performance standards in the PAs is valid and objective;
- iii. Detect potential problems in the system (early warning) and advise the Head of the Department accordingly;
- iv. Review overall assessment scores in the department to ensure consistency;
- v. Make recommendations regarding actions to be considered where managers and supervisors do not properly and fairly execute their responsibilities with regard to assessment and rating in terms of the EMS PMDS.
- vi. Submit reports to the DG/HOD on their activities.

b) District level:

- i. Ensure that there is compliance in terms of the applicable policy/collective agreement.
- ii. Responsible for resolving any differences that may arise
- iii. Identify issues of non-compliance with the EMS PMDS collective agreement.
- iv. Submit reports to the provincial moderation committee on its activities.

Note: The above processes do not take away the right of an employee to invoke formal dispute resolution procedures if aggrieved by the outcome of the moderation committee.

7.4.5 Meetings of the committee

- a) Depending on operational requirements, the moderation committees (National/Provincial) will be required to meet at least twice per performance cycle as follows:
 - i. *At the end of the performance cycle:* to review and moderate the overall assessment results of the assessment process to ensure consistency within the department;
 - ii. *At the start of the new cycle:* to monitor the results of performance planning and agreement activities to ensure compliance and detect potential problems in the system.
- b) The district sub-committee should meet at least twice per performance cycle to ensure that employees and their supervisors are complying with all the requirements as required in the EMS PMDS agreement.
- c) Additional meetings may be arranged as the need arises.

7.4.6 Moderation process

The moderation process operates at two levels;

a) At individual level:

The role of the moderating committee is to ensure that supervisors are agreeing with their subordinates on work plans and appraising performance in a realistic, consistent and fair manner.

b) At departmental/district level:

The moderating committee must satisfy itself that departmental plans are developed and the EMS PMDS procedures are followed. This will be achieved by:

- i. Ensuring that the supervisors overview the performance management actions and assessment outcomes of their subordinates;
- ii. Ensuring that scores given across the department are valid and authentic, and
- iii. Ensuring that grievances referred to it are resolved amicably.

7.4.7 Discrepancies encountered during the moderation process

- a) If a moderating committee identifies deviations or discrepancies, the following steps should be followed:
 - i. refer back and furnish reasons thereof to the supervisor who had agreed to the rating with his or her subordinate(s); and
 - ii. This should be accompanied by a request for reconsideration of the rating.
- b) Unless it is an overall assessment score adjustment that alters the assessment scores of all employees (as a group) by the same quantum, a moderating committee may not change an individual employee's assessment score, without first referring the issue back to the supervisor who made the initial assessment, or any moderation sub-committee that might have been involved in the process.
- c) A moderation committee must keep detailed minutes of all decisions made.

7.5 Disagreements and grievances

In cases of any disagreement between the employee and the supervisor, all efforts should be made to resolve such disagreements at that level.

If any disagreements regarding the moderation of the evaluation of an employee must be dealt with in terms of the grievance procedure as stipulated in Chapter G of the PAM.

8. MANAGING PERFORMANCE THAT IS UNSATISFACTORY (RATING OF 1 & 2)

Supervisors are required to first identify and then, in line with a developmental approach, deal with unacceptable performance of employees under their supervision. The supervisor must comply with the procedural requirements of the Employment of Educators Act 1998 and Personnel Administrative Measures – *"Incapacity Code"*.

9. IMPLEMENTATION GUIDELINES

The employer will develop guidelines and instruments for the effective implementation and monitoring of the EMS PMDS for office-based educators.

SECTION B: PERFORMANCE AGREEMENT

ANNEXURE A

PERFORMANCE AGREEMENT EMS: OFFICE-BASED

ENTERED INTO BY AND BETWEEN

I (Full Name)
as the (position) of the
..... (Department)
(herein referred to as the Employee).

AND

The (Department) herein
represented by..... (full name) in her/his
capacity as..... (position) of the
..... (Department).
(herein referred to as the Employer).

WHEREBY IT IS AGREED AS FOLLOWS:

1. PURPOSE

- 1.1 The purpose of entering into this agreement is to communicate to the Employee the performance expectations of the Employer.
1.2 The performance agreement and accompanying work plan shall be used as the basis for assessing the suitability (during probation only) of the Employee and to assess whether the Employee has met the performance expectations applicable to his/her job.
1.3 Should any disagreement arise between the Employer and the Employee in respect of matters regulated by this agreement, the process outlined in paragraph 7.5 of the EMS PMDS should be followed.

2. VALIDITY OF THE AGREEMENT

- 2.1 The agreement will be valid for the period 1 April 2 to 31 March 2.....
2.2 The content of the agreement may be revised at any time during the above-mentioned period to determine the applicability of the matters agreed upon, especially where changes are significant.

2.3 If at any time during the validity of this agreement the work environment of the employee changes (whether as a result of Government or Management decisions or otherwise), to the extent that the contents of this agreement are no longer appropriate, the contents shall immediately be revised.

3. JOB DETAILS

3.1 Province	
3.2 District	
3.3 Persal number	
3.4 Component	
3.5 Unit	
3.6 Post / Designation	
3.7 Salary Level	
3.8 Salary Notch	
3.9 Occupational classification	

4. JOB PURPOSE

Briefly describe the purpose of the job (overall focus) as it relates to the Vision and Mission of the Department. Capture the overall accountability that the employee has in relation to his/ her position as an office based educator.

.....

.....

.....

.....

5. REPORTING REQUIREMENTS/LINES & ASSESSMENT LINES

- 5.1 The Employee shall report to the (job title in Department) as her/his supervisor on all parts of this agreement. The Employee shall:
- Timeously alert the supervisor of any emerging factors that could preclude the achievement of any performance agreement undertakings, including the contingency measures that she/he proposes to take to ensure the impact of such deviation from the original agreement is minimised.
 - Establish and maintain appropriate internal controls and reporting systems in order to meet performance expectations

- Discuss and thereafter document for the record and future use any revision of targets as may be necessary as well as progress made towards the achievement of performance agreement measures.

5.2 In turn the supervisor shall:

- Meet the employee to provide feedback on performance and to identify areas for development at least four times during a performance cycle.
- Create an enabling environment to facilitate effective performance by the Employee.
- Facilitate access to skills development and capacity building opportunities.
- Work collaboratively with the employee to solve problems that may be impacting on the performance of the employee and generate solutions to common problems within the department, that may be impacting on the performance of the Employee.

6. PERFORMANCE ASSESSMENT FRAMEWORK

Performance will be assessed according to the information contained in the Work Plan and the Core Management Criteria (CMC) framework.

6.1 The KRAs and CMCs during the period of this agreement shall be as set out in the table below.

6.2 The Employee undertakes to focus and to actively work towards the promotion and implementation of the KRAs within the framework of the laws and regulations governing the Education sector. The specific duties/outputs required under each of the KRAs are outlined in the attached work plan.

Key Result Areas (KRAs)	Weight
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
TOTAL	100%

NOTE: **Minimum weighting of a KRA = 5%**
 Maximum weighting of a KRA = 20%
 Weighting of KRAs must total 100%

6.3 The Employee's assessment will be based on her/his performance in relation to the duties/outputs outlined in the attached Work Plan as well as the CMCs listed below.

Core Management Criteria (CMCs)	Weight
1. Job knowledge and application	20%
2. Leadership abilities	20%
3. Interpersonal relationships	10%
4. Communication	*
5. Service to stakeholders	10%
6. Acceptance of responsibility	*
7. Conceptual and analytical skills	*
Total	100%

NOTE:

Minimum weighting of a CMC = 5%

Maximum weighting of a CMC = 20%

* Weighting for CMCs 4, 6 and 7 to be jointly decided between employee and supervisor.

Weighting of 7 CMCs must total 100%

7. CONDITIONS OF PERFORMANCE

The Employer shall provide the Employee with the necessary resources and leadership to perform in terms of this agreement. Resource requirements should be outlined in the Work Plans of individual Employees.

8. PERFORMANCE ASSESSMENT

The assessment of an Employee shall be based on her/his performance in relation to the KRAs and CMCs and performance indicators, as set out in this Performance Agreement and attached Work Plan.

The performance of the employee in respect of all individual KRAs and all individual CMCs will be assessed using a 5-point rating scale, i.e.:

5	EXCELLENT PERFORMANCE
4	GOOD PERFORMANCE
3	COMPETENT
2	PERFORMANCE NEEDS TO IMPROVE
1	UNSATISFACTORY PERFORMANCE

The total KRAs and the total CMCs scores are combined to produce an overall performance percentage score with percentage ranges that coincide with the above 5point assessment scale.

Employees: KRAs shall contribute 70% and CMCs 30% of the final assessment.

9. FEEDBACK

Performance feedback shall be in writing during the Mid-Year Review and Annual Performance Assessment, based on the supervisor's assessment of the employee's performance in relation to the KRAs and CMCs and standards outlined in this performance agreement and taking into account the Employee's/ self-assessment.

10. DEVELOPMENTAL REQUIREMENTS

10.1	The Employer and Employee agree that the following are the Employee's key development needs in relation to his/her current job and envisaged career path in the Education sector. Please forward the completed Form PDP to the Skills Development Facilitator (as it is a requirement for the approval of training).
------	---

* Only itemise development areas below

.....

.....

.....

.....

10.2 In so far as the above training needs coincide with the Employer's requirements and taking into account financial realities, the Employer undertakes to expose the Employee to development in these areas. The developmental needs of the Employee shall be reviewed as part of the September Review and the annual assessment of performance. Details of courses, conferences, etc. to be attended shall as far as possible be included in the Employee's PDP

11. TIMETABLE AND RECORDS OF REVIEW DISCUSSIONS AND ANNUAL PERFORMANCE ASSESSMENT

11.1 First Quarter Review (Informal)	July
11.2 Mid-Year Review (Formal)	October
11.3 Third Quarter Review (Informal)	January
11.4 Annual Assessment (Formal)	April

12. MANAGEMENT OF POOR PERFORMANCE OUTCOMES

The supervisor and employee will identify and develop interventions together to address poor and non-performance at feedback sessions, or any time during the performance cycle.

13. DISAGREEMENTS AND GRIEVANCES

13.1 Should any disagreement arise between the Employer and the Employee in respect of matters regulated by this agreement, the process outlined in paragraph 7.5 of the EMS PMDS should be followed.

14. AMENDMENT OF AGREEMENT

Amendments to the agreement shall be in writing and can only be effected after discussion and agreement by both parties.

15. SIGNATURES OF PARTIES TO THE AGREEMENT

The contents of this document have been discussed and agreed with the Employee concerned.

Name of Employee:

Signature..... Date:

AND

Name of supervisor:

Signature: Date:.....

ANNEXURE B**GUIDE TO THE PERFORMANCE WORK PLAN**

One of the most challenging aspects of performance management is agreeing on the nature, content and detail of the actual performance agreement. In the performance agreement, this is captured largely in the work plan. A major problem in performance management is the wide diversity of words and terms used to describe aspects related to performance management and assessment. This EMS PMDS attempts to standardise terminology to promote a common understanding of those issues that should be included in the work plan and to unpack key result areas and outputs. A further complication is the wide diversity of jobs. Most work plans are therefore unique, while there may be similarities within job categories with a more routine content. The drafting of a work plan and agreement thereon between the supervisor and employee is therefore of prime importance in the performance management and assessment process.

The definition of the terms is critical as they are also used as basis for the assessment at the end of the cycle. Performance assessment or measurement is difficult and complex. An effective system of performance assessment will require years of consistent, incremental work to achieve. Acceptance of the performance management and assessment process is essential to the success, legitimacy and integrity of the performance management system.

The following terms are used with the meaning as indicated:

WORK PLAN: In the EMS PMDS, a work plan is described as a document which is part of the performance agreement and which contains key result areas (KRAs), associated outputs and their performance standards and resource requirements. An example of the template is attached.

OUTPUT: An output is a concrete result that contributes to the achievement of a Key Result Area.

PERFORMANCE STANDARD: Performance standards are mutually agreed criteria to describe how well work must be done in terms of quantity and/or quality and timeliness, to clarify the outputs and related activities of a job by describing what the required result should be. In this EMS PMDS, performance standards are divided into indicators and the time factor.

PERFORMANCE INDICATOR: An indicator is used to gauge the extent to which an output has been achieved (policy developed, presentation delivered, service rendered)

TIMEFRAME: The timeframe is used to determine whether the activities were completed as planned.

ENABLING CONDITIONS: These refer to factors that will enable the delivery of the output (availability of the required financial and human resources) and conversely, under what conditions or situations of change can the employee not be expected to deliver the output (unfilled vacancies, a cut in the budget).

A **suggested** work plan template follows as **Annexure C** below:

ANNEXURE C

Work Plan (Year)

NAME PERIOD	OFFICE DESIGNATION	KEY RESULT AREA	KEY ACTIVITIES	WEIGHTING	TIME-FRAME	PERFORMANCE INDICATORS	NOTES ON PROGRESS, CHANGED CIRCUMSTANCES, RESOURCES AND ENABLING CONDITIONS

KEY RESULT AREA	KEY ACTIVITIES	WEIGHTING	TIME-FRAME	PERFORMANCE INDICATORS	NOTES ON PROGRESS, CHANGED CIRCUMSTANCES, RESOURCES AND ENABLING CONDITIONS

Agreed (Signatures):

Employee	Date	Supervisor	Date
----------	------	------------	------

PS: Additional forms may be used to complete further KRAs

ANNEXURE D

PERSONAL DEVELOPMENT PLAN (PDP)

EMS: OFFICE BASED EDUCATORS

DEPARTMENT	
COMPONENT	
DESIGNATION	
EMPLOYEE	
SUPERVISOR	

PURPOSE: To enable the manager and the employee to identify skills development requirements and as a result agree on the steps taken to address those developmental gaps.

AREAS IDENTIFIED FOR DEVELOPMENT	OBJECTIVE OF DEVELOPMENT	TYPE OF INTERVENTION (SHORT COURSE, WORKSHOP, CONFERENCE, ETC.))	TIMEFRAME

IMPACT ASSESSMENT

IMPACT OF DEVELOPMENT ON WORK (AFTER SIX MONTHS)	
EMPLOYEE	SUPERVISOR/MANAGER

We,(Employee) and (Supervisor) agree that the above-mentioned areas for development and the type of intervention suggested will be engaged in to achieve the required objective for development. We also understand that due to the operational requirements of the Department it may not be possible to undertake the training and development stated with the type of intervention stated and/or within the timeframes as stated. There is also an understanding between ourselves that areas for development could be identified throughout the performance cycle and that this may change the order of priority and type of intervention as stated in the plan.

Signatures:

Employee	
Date	
Supervisor	
Date	

SECTION C: ASSESSMENT INSTRUMENTS

ANNEXURE E

**ANNUAL / MID-YEAR PERFORMANCE ASSESSMENT
EMS: OFFICE-BASED EDUCATOR**

C O N F I D E N T I A L

Period under review	
Employee	
Designation	
Persal Number	
Office	
Date of appointment to current post	
Supervisor	

PART 1 – COMMENTS BY EMPLOYEE

(To be completed by the Employee prior to assessment. If the space provided is insufficient, the comments can be included in an attachment)

1. During the past year my major accomplishments as they related to my performance agreement were:

2. During the past year I was less successful in the following areas for the reasons stated:

PART 2 – PERFORMANCE ASSESSMENT

Standard rating schedule for KRAs and CMCs

RATING	CATEGORY	%	DESCRIPTION
1	UNSATISFACTORY PERFORMANCE	0% - 49%	Performance does not meet the standard expected for the job. The review/assessment indicates that the jobholder has achieved less than competent results against almost all of the performance criteria and indicators as specified in the Performance Agreement and Work plan.
2	PERFORMANCE NEEDS IMPROVEMENT	50% - 59%	Performance meets some of the standards expected for the job. The review/assessment indicates that the jobholder has achieved less than competent results against more than half of the performance criteria and indicators as specified in the Performance Agreement and Work plan.
3	COMPETENT	60% - 75%	Performance fully meets the standard expected in all areas of the job. The review / assessment indicates that the jobholder has achieved as a minimum effective results against all of the performance criteria and indicators as specified in the Performance Agreement and Work plan.
4	GOOD PERFORMANCE	76% - 90%	Performance is significantly higher than the standard expected in the job. The review/assessment indicates that the jobholder has achieved better than competent results against more than half of the performance criteria and indicators as specified in the Performance Agreement and Work plan and fully achieved all others throughout the performance cycle.
5	EXCELLENT PERFORMANCE	91% - 100%	Performance far exceeds the standard expected of a jobholder at this level. The review/assessment indicates that the jobholder has achieved better than competent results against all of the performance criteria and indicators as specified in the Performance Agreement and Work plan and maintained this in all areas of responsibility throughout the performance cycle.

Rating of KRAs by Employee and Supervisor:

Key Result Areas (KRAs)	Weight (%)	Own rating (1- 5)	Supervisor's rating (1- 5)
1.			
2.			
3.			
4.			
5.			
6.			
7.			

Key Result Areas (KRAs)	Weight (%)	Own rating (1- 5)	Supervisor's rating (1- 5)
8.			
Total (NOTE: Weighting of KRAs must total 100%)	100%		
Score according to calculator:	70%		

Rating of CMCs by Supervisor and Employee:

Core Management Criteria – CMCs	Weight (%)	Own rating (1- 5)	Supervisor's rating (1- 5)
1. Job knowledge and application	20%		
2. Leadership abilities	20%		
3. Interpersonal relationships	10%		
4. Communication	*		
5. Service to stakeholders	10%		
6. Acceptance of responsibility	*		
7. Conceptual and analytical skills	*		
Total (NOTE: Weighting of CMCs must total 100%)	100%		
Score according to calculator:	30%		

FINAL SCORE:

GRAND TOTAL	EMPLOYEE'S SCORE	SUPERVISOR'S SCORE	MODERATING COMMITTEE'S SCORE
KRA + CMC (70% + 30%)			

PART 3 – DEVELOPMENT, TRAINING, COACHING, GUIDANCE AND EXPOSURE NEEDED

(To be completed by Supervisor in consultation with Employee)

Developmental need	Intervention strategy	Timeframe	Responsibility

PART 4 – RECOMMENDATIONS/COMMENTS

1. EMPLOYEE'S COMMENTS

2. SUPERVISOR'S COMMENTS

AGREED:

Signatures:

Employee	
Date	

Supervisor	
Date	

3. COMMENTS BY MODERATING COMMITTEE

Name	
Signature	
Date	

ANNEXURE F

Example: CALCULATOR: EMS PERFORMANCE ASSESSMENT

KRA	WEIGHT	RATING	SCORE		CMC	WEIGHT	RATING	SCORE	
1	30	4	24		1	20	4	16	
2	20	4	16		2	20	5	20	
3	20	3	12		3	10	4	8	
4	20	4	16		4	10	4	8	
5	10	5	10		5	10	4	8	
6			0		6	15	4	12	
7			0		7	15	3	9	
8			0		8			0	
9			0		9			0	
10			0		10			0	
	100		78	%		100		81	%
KRA WEIGHT			70	%	CMC WEIGHT			30	%
KRA SCORE			54.6	%	CMC SCORE			24.3	%
FINAL SCORE			79	%					

Guide to calculating score**1. KRA**

KRA 1 Score	=	(rating * weight) / 5
	=	(4 * 30) / 5
	=	24
KRA Score (%)	=	(KRA Weight * Total) / 100
	=	(70 * 78) / 100
	=	54.6%

2. CMC

CMC 1 Score	=	(rating * weight) / 5
	=	(4 * 20) / 5
	=	16
CMC Score (%)	=	(CMC Weight * Total) / 100
	=	(30 * 81) / 100
	=	24.3%

3. FINAL SCORE

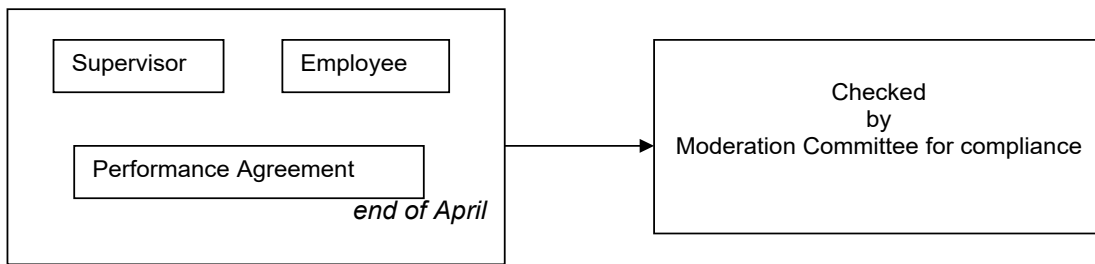
Final Score	=	KRA Score (%) + CMC Score (%)
	=	54.6% + 24.3%
	=	<u>79%</u>

SECTION D: SCHEMATIC REPRESENTATION OF THE PMDS

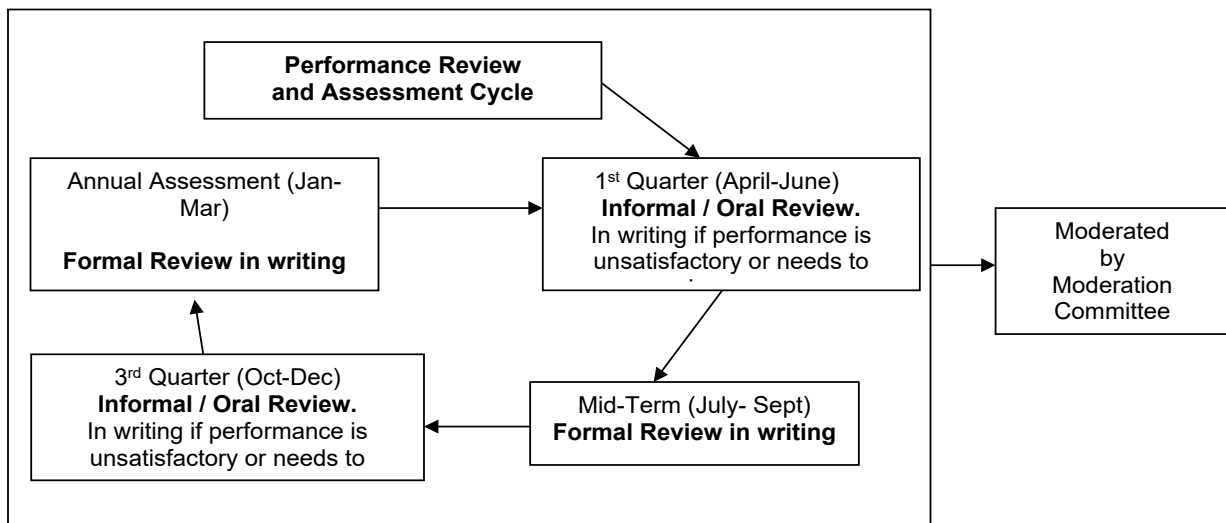
ANNEXURE G

Performance Management and Development System

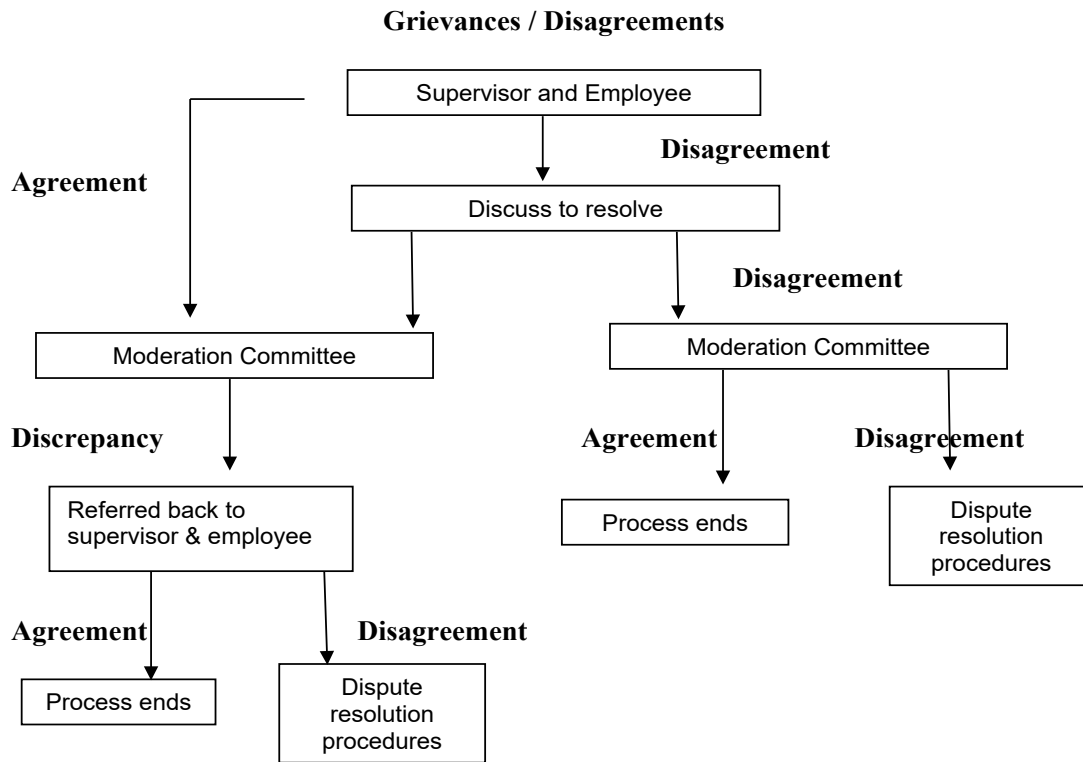
Level 1: Performance Agreement



Level 2: Performance Assessment



ANNEXURE H



CHAPTER K: QUALITY MANAGEMENT SYSTEM (QMS) FOR SCHOOL BASED EDUCATORS (*Collective Agreement Number 2 of 2020*)

Note: QMS was meant to replace IQMS from 1 January 2021. However, this has only been applied for School Principals. For the rest of the educators, the implementation of QMS will take place effect from 1 January 2022 following the completion QMS training for all educators.

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SECTION A: Information Resource Pack

QUALITY MANAGEMENT SYSTEM (QMS)

PAM Chapter K

K - 291

1. BACKGROUND

An agreement was reached in the ELRC (Resolution 8 of 2003) to integrate the existing programmes on quality management in education. The existing programmes were the Developmental Appraisal System (DAS) that came into being on 28 July 1998 (Resolution 4 of 1998), the Performance Measurement System that was agreed to on 10 April 2003 (Resolution 1 of 2003) and the policy on Whole-School Evaluation (WSE Policy, 26 July 2001). The three quality management programmes were integrated to constitute the Integrated Quality Management System (IQMS), signed as ELRC Collective Agreement No.8 of 2003. The IQMS is informed by Schedule I of the Employment of Educators Act, No. 76 of 1998 where the Minister is required to determine performance standards for educators in terms of which their performance is to be evaluated.

The IQMS has been in place since 2003 but was only implemented in schools from 2005. Despite all the measures put in place to strengthen its implementation, schools continued to experience challenges, resulting in the teacher development summit being convened on 29 June to 2 July 2009, to identify and address, amongst others, factors responsible for its poor implementation.

The summit agreed on, amongst others, the following;

- That a clear, coherent policy and regulatory environment be designed for both teacher appraisal and teacher development, which teachers and other role-players can easily understand and with which they can readily engage;
- That teacher appraisal for purposes of development be de-linked from appraisal for purposes of remuneration and salary progression, and
- That IQMS be streamlined and re-branded.

Purpose of streamlining and re-branding

The main purpose of the streamlining and rebranding process is:

- a) To enable the different quality management programmes to inform and strengthen one another;
- b) To define the relationship among the different programmes;
- c) To avoid unnecessary duplication in order to optimise the use of human resources.
- d) To strengthen accountability.

2. WHAT IS QUALITY MANAGEMENT SYSTEM (QMS) FOR EDUCATORS?

Quality Management System is a performance management system for school-based educators, designed to evaluate the performance levels of individuals in order to achieve high levels of school performance. It is critical in assessing the extent to which educators are performing in line with their job descriptions in order to improve levels of accountability in our schools.

QMS incorporates the following:

- Measuring the performance of educators in line with their respective roles and responsibilities;
- Providing a basis for decisions on rewards, incentives and other salary related benefits for the applicable year;
- Providing a basis for decisions on mechanisms to recognize good performance and address under-performance, and
- Consideration of the relevant contextual factors in conducting assessments.

3. PURPOSE OF QUALITY MANAGEMENT SYSTEM

- To determine levels of competence of all educators;
- To enhance educator efficiency, effectiveness and good performance;
- To improve accountability levels within schools;
- To provide a basis for decisions on mechanisms to recognize good performance and address underperformance;
- To ensure that educators perform their duties with integrity, and maintain a positive, vigilant attitude towards all learning activities;
- To provide a basis for paying salary progression, rewards and other incentives, and
- To provide mechanisms for assessing educators, taking into account the context within which they operate.

4. GUIDING PRINCIPLES

The implementation of the Quality Management System for educators is guided by the following principles:

- To recognize that schools are not the same, and are operating at different levels of performance;
- To recognize that schools are operating in different contexts, and are exposed to different challenges;
- To ensure fairness by taking into account relevant contextual factors that impact on educator performance. These contextual factors include, but are not limited to:
 - Levels of support provided to educators;
 - Infrastructure issues;
 - Socio-economic environment, and
 - Unforeseen challenges
- To minimise subjectivity through transparent and open discussion throughout the appraisal process, and the possible involvement of a resource person as an observer where necessary;
- To ensure that the instrument is valid, reliable and relevant
- To use the QMS instrument professionally, uniformly and consistently, and
- To provide feedback on the appraisal process by focusing on:
 - Performance and not personality;
 - Availability of evidence and not assumptions;
 - Objectivity and not subjectivity;
 - The specific and concrete and not the general and the abstract;

5. ROLES AND RESPONSIBILITIES OF INDIVIDUALS AND STRUCTURES INVOLVED IN IMPLEMENTING THE EDUCATOR APPRAISAL SYSTEM

5.1 The Principal

- Ensures that all appraisal records and accompanying evidence are authentic;
- Is responsible for the verification of the appraisal processes within the school;
- Has the overall responsibility to ensure that QMS is implemented uniformly and effectively at the school;
- Must ensure that every educator has access to the QMS instrument and any other relevant documents;
- Ensure that the performance appraisal of every educator is conducted consistently, fairly and accurately using the approved instrument;

- Together with SMT members, is responsible for advocacy and training at school level;
- Must organise a workshop on QMS where individuals will have the opportunity to clarify areas of concern;
- Verifies that the information provided in the documents is accurate, properly completed, signed, dated and stamped;
- Should the principal be aware of any discrepancy, this should be brought to the attention of the relevant supervisor and resource person, who will be required to correct it;
- Signs and delivers all QMS documents to the District office within the stipulated timeframes;
- Ensures that the appraisals of educators is included in the management plan of the school;
- In the absence of the immediate supervisor of an educator, the principal must ensure that a designate is nominated to fulfill the role, and
- Ensures that all grievances regarding the appraisal processes within the school are amicably resolved.

5.2 School Management Team (SMT)

- The SMT, consisting of the Principal and, where applicable the Deputy-principal and Departmental Heads, has the overall responsibility of managing the planning and implementation of QMS processes;
- Ensures that all staff members are trained on the procedures and processes of the QMS;
- Prepares and monitors the management plan for the QMS in the school;
- Prepares a final schedule of the appraisal dates;
- Ensures that all records and documentation on QMS are properly kept and maintained;
- Ensures that evidence relied upon during the appraisal process is valid;
- Conducts Performance Appraisals for educators under his/her supervision, including classroom observations, and keeps records thereof;
- Assists the Principal in finalising the appraisal scores of educators;
- Ensures that QMS is applied consistently, and
- Ensure that they provide support to the principal in executing his/her duties regarding this process.

5.3 The Educator

- Must familiarise him/herself with the QMS processes;
- Conducts a self-appraisal prior to being appraised by the immediate supervisor, using the QMS instrument;
- Allows the immediate supervisor to conduct lesson observations;
- Should inform the supervisor during the pre-appraisal meeting or at least three days prior to the scheduled appraisal date on the intention to involve a resource person;
- Participates in pre-appraisal and post-appraisal discussions with the immediate supervisor and resource person, and
- Keeps relevant evidence for the appraisal process.

5.4 The Resource Person

- The resource person is an educator who may be requested by the appraisee to assist in the appraisal process through the provision of a subject or other relevant expertise;
- The resource person may be from the same school or another school;

- Despite the resource person being an observer, he/she may give an opinion on the appraisal process;
- He/she will be required to sign off the final appraisal instrument, and
- He/ she may not serve in the appraisal of more than two educators.

5.5 The Circuit Manager

- As the immediate supervisor of the principal, he/she has the responsibility to manage the performance of principals in a consultative, supportive and non-discriminatory manner to enhance school efficiency and accountability;
- Agrees on a work plan with the principal with clear annual targets for improvement;
- Provides for the development and arrangement of professional development programmes for principals in accordance with their identified needs;
- Prepares a management plan for providing support to principals in the circuit.
- Prepares a final schedule of the appraisal dates for principals;
- Ensures that all appraisal records and documentation on principals are properly kept and maintained;
- Ensures that evidence relied upon during the appraisal process is valid;
- Conducts Performance Appraisals for principals under his/her supervision, including classroom observations, and keeps records thereof;
- Ensures that QMS is applied consistently;
- Manages grievances that may arise concerning all appraisal processes, and
- Responsible for verification of appraisal outcomes in schools under his/her supervision.

5.6 Grievance committee at school level

- The school grievance committee consists of the following members:
 - The principal, who will serve as a Chairperson;
 - Where necessary, the principal may request a principal from a neighbouring school to preside over the matter;
 - One other member of the SMT, and
 - One representative from each of the unions that are admitted to the ELRC and have members in the school.
- The structure is responsible for resolving any grievances or disagreements at school level.

5.7 Grievance committee at circuit level

- The circuit grievance committee consists of the following members:
 - The Circuit Manager, who will serve as Chairperson;
 - Where necessary, the circuit manager may request a circuit manager from a neighbouring circuit to preside over the matter;
 - One other official from the district, and
 - One representative from each of the unions that are admitted to the ELRC.
- The structure is responsible for resolving any grievances or disagreements that have been referred to it by the school grievance committee.

6. GUIDELINES ON IMPLEMENTATION OF QMS

6.1 Completion of a Work-plan

6.1.1 The Principal, Deputy Principal and Departmental Heads are required to complete and sign a work-plan at the beginning of an evaluation cycle. The principal has to agree and sign the work-plan together with the circuit manager who is his/her immediate supervisor. Similarly, the Deputy Principal has to agree and sign the work-plan with the principal, who is his/her immediate supervisor. Departmental Heads have to sign their work-plans either with the Deputy Principal or with the Principal. The work-plan has the following components:

- **Performance standards:** these are applicable performance standards as reflected in the QMS instrument.
- **Key activities:** these are activities to be agreed to in terms of applicable job descriptions.
- **Targets:** these are targets to be set for improvement within the appraisal cycle.
- **Time-frame:** the period within which the targets are to be achieved.
- **Performance indicators:** these are measures of success to be observed for achieving specific targets.
- **Contextual factors:** these are unique/specific circumstances to be taken into account that have the potential to impact on the employee's ability to achieve targets.

6.2 Advocacy, Training and Planning

6.2.1 At a full staff meeting, the principal will explain to the staff the following:

- What the QMS is;
- The benefits of the QMS for educators, learners, the school and the system, and
- How the QMS will be implemented in the school.

6.2.2 The training should ensure that:

- All educators have a thorough understanding of the purposes, principles, processes and procedures of the QMS, and
- Issues relating to how the QMS will be implemented in the school are addressed.

6.3 Appraisal Timelines

6.3.1 Appraisals must be conducted twice per annum as follows:

- **Mid-year appraisal:** Towards the end of the second term, taking into account all forms of assessment administered during the first and second term, and
- **Annual appraisal:** be completed by the end of the school calendar year, taking into account all forms of assessments prior to this appraisal;

6.3.2 The principal is responsible for signing all appraisal forms after satisfying him/herself that all the processes, together with accompanying evidence, have been complied with.

6.4 Self- appraisal by the educator

6.4.1 The educator must conduct a self-appraisal prior to the appraisal by his/her supervisor;

6.4.2 Self-appraisal serves the following purpose:

- The educator becomes familiar with the instrument;
- The educator is compelled to reflect critically on his/her own performance;
- The educator can make inputs on the appraisal conducted by the immediate supervisor, and
- The educator is able to know the evidence that will be necessary for the appraisal process.

6.5 Lesson Observation

6.5.1 Lesson observations will be undertaken by the immediate supervisor as part of the mid-year and annual appraisal process;

6.5.2 The resource person may also participate in the lesson observation process;

6.5.3 More lesson observations are encouraged, depending on the need;

6.5.4 The purpose of the lesson observation is:

- To appraise the performance of the educator
- To confirm (or otherwise) the educator's perception of his/her own performance in the classroom;
- To provide a basis for the assessment of the educator's pedagogical skills.

6.5.5 Lesson Observation Instrument (LOI):

- Consists of Performance Standards one (1) to three (3) of the QMS-instrument for Post Level 1 and Post Level 2 educators;
- Consists of Performance Standard One (1) – Criterion 1 of the QMS instrument for Post Level 3 and Post Level 4 educators.
- Must be completed by the immediate supervisor and the resource person, if applicable, during each lesson observation;
- Must be signed by both parties and kept as evidence, and
- Must be taken into account during the appraisal processes.

6.6 Pre-appraisal and post-appraisal discussion:

6.6.1 A pre-appraisal discussion between the supervisor and educator as well as the resource person must be held before any lesson observation for the following purpose:

- To have a common understanding of Performance Standards and rating;
- To identify and agree on contextual factors that are likely to impact on the educator's performance, and how they will be mitigated;
- To discuss expectations of the classroom observation process, and
- To have an understanding of necessary evidence for the appraisal.

6.6.2 A post-appraisal discussion between the supervisor and educator as well as the resource person must be held after the lesson observation for the following purpose:

- To consolidate Performance Standards which could not be rated during classroom observation;
- To assess how identified contextual factors have been dealt with;
- To share information pertaining to the performance and scores of the appraisee, and
- To sign documents.

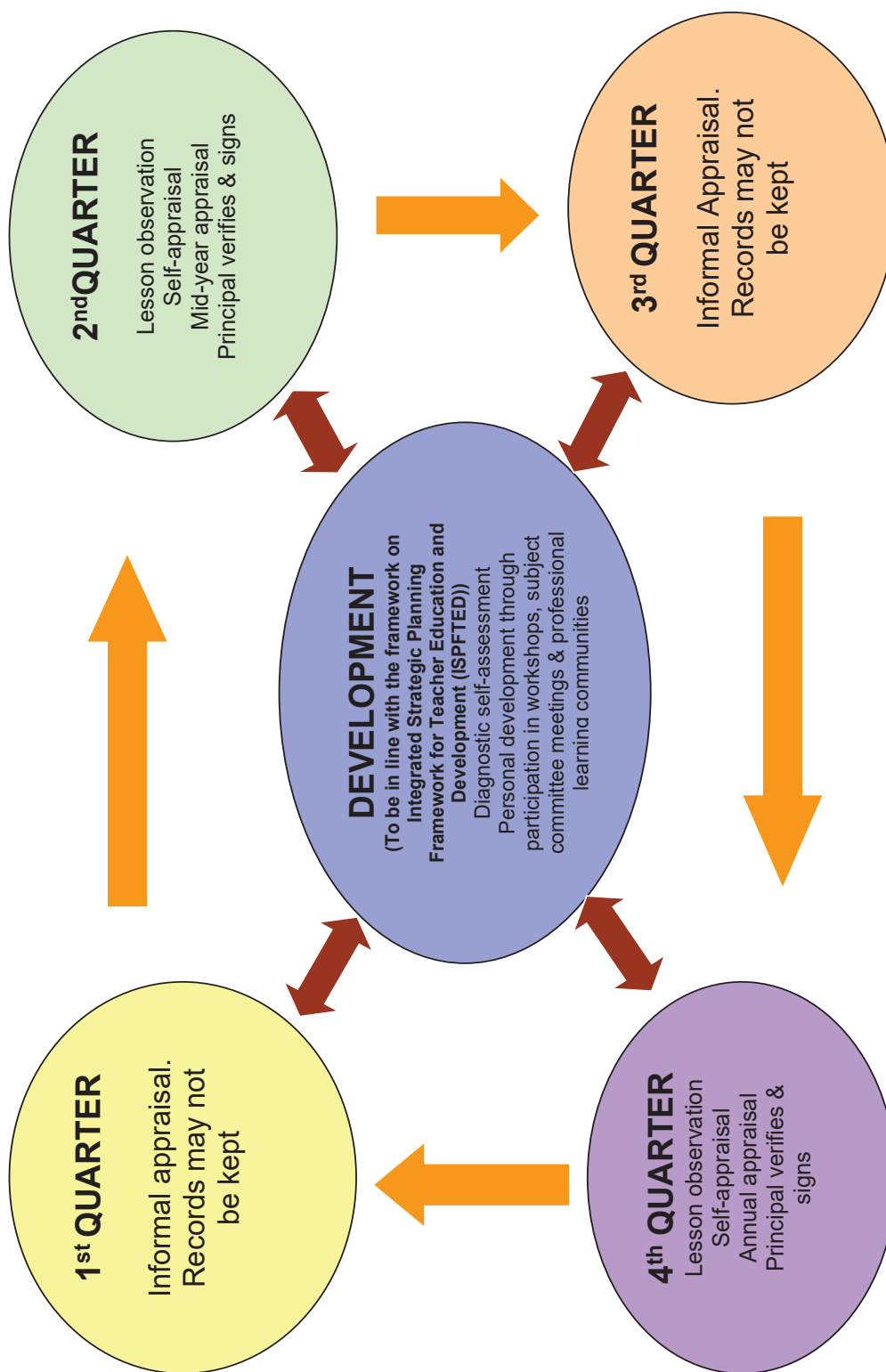
6.7 Completion of the QMS instrument

- 6.7.1 The immediate supervisor is required to record all information clearly and accurately in the appropriate columns of the QMS-instrument.
- 6.7.2 During the appraisal, the immediate supervisor will rate each educator on his/her performance and record his/her comments based on each performance standard.
- 6.7.3 The educator will also record his/her comments on the appraisal instrument;
- 6.7.4 The resource person will also record his/her comments on the appraisal instrument.
- 6.7.5 A completed instrument will be signed by the educator, the supervisor as well as the resource person after the appraisal process.
- 6.7.6 The supervisor must forward the completed instrument to the principal's office at the scheduled time.
- 6.7.7 The principal will sign the completed instrument after both the educator and the supervisor have signed, and after satisfying him/herself that all processes have been complied with.
- 6.7.8 Should the principal be aware of any discrepancy, this should be brought to the attention of the relevant supervisor as well as the resource person, who will be required to correct it.
- 6.7.9 The principal reserves the right to designate any member of the SMT, (who is conversant with the subject or phase) to conduct an appraisal process should it be evident that the relevant supervisor is unable to do so.

6.8 Rating and scoring

- 6.8.1 A rating of one (1) to four (4) will be allocated to each criterion in the appraisal instrument.
- 6.8.2 A score will be allocated for each Performance Standard and will consist of the sum of the ratings allocated to each criterion in that Performance Standard.
- 6.8.3 In allocating a rating to a descriptor/element where contextual factors have been identified, consideration must be given to the following
 - The nature of the contextual factor;
 - The level of its impact on the educator's performance, and
 - The extent to which the educator is/was able to mitigate such impact.
- 6.8.4 A rating guide, which is presented as a guideline on levels of educator performance, should be used during the rating process.

7. SCHEMATIC REPRESENTATION OF THE RELATIONSHIP BETWEEN APPRAISAL AND DEVELOPMENT



K - 292

PAM Chapter K

1. RELATIONSHIP BETWEEN APPRAISAL AND DEVELOPMENT

4.1 Professional Development of Educators

The teacher development summit held in 2009 agreed that evaluations for purposes of rewards and incentives need to be de-linked from evaluations for purposes of professional development of educators. However, there is a recognition that the two processes must inform one another.

4.2 Needs identification

The QMS will be one of the mechanisms used to identify the developmental needs of educators.

NOTE:

The Integrated Strategic Planning Framework for Teacher Education and Development (ISPFTED) provides for the establishment of structures to drive the professional development of educators. These include the establishment of professional learning communities and subject committees. Furthermore, the School Management Teams are expected to put processes in place to ensure that needs identified through the QMS and other processes are responded to. SMTs are therefore expected to provide the development of educators as part of their mentoring and coaching or ensure that support is provided through the involvement of subject advisors and other external experts and service providers. SMTs have the responsibility to ensure that structures created in terms of the ISPFTED are functional and effective. Similarly, Circuit Managers are expected to ensure that QMS is implemented in schools and principals are supported accordingly.

5. DISAGREEMENTS AND GRIEVANCES

8.1 School Level

In cases of any disagreement between the educator and the supervisor, all efforts should be made to resolve such disagreements at that level, including intervention by the principal.

If no resolution is found, the aggrieved party must refer the grievance to the principal within three working days. The principal must establish a grievance committee within five working days after the receipt of the grievance. The grievance committee must consist of the following:

- The principal, who is the Chairperson;
- Where necessary, the principal may request a principal from a neighbouring school to preside over the matter;
- One other member of the SMT, and
- One representative from each of the unions that are admitted to the ELRC and have members in the school.

The grievance committee must resolve the grievance within 10 working days after its establishment.

8.2 Circuit Level

Should the aggrieved party be unhappy with the decision of the grievance committee at the school level, he/she must refer the matter to the circuit manager in writing within five working days. The circuit manager must establish a grievance committee within five working days after the receipt of the grievance. The grievance committee must consist of the following:

- The Circuit Manager, who is the Chairperson;
- Where necessary, the circuit manager may request a circuit manager from a neighbouring circuit to preside over the matter;
- One other official from the district, and
- One representative from each of the unions that are admitted to the ELRC.

The circuit grievance committee must resolve the grievance within 10 working days after its establishment.

Should an employee disagree with the decision of the circuit grievance committee, such an employee may invoke the dispute resolution procedures of the ELRC.

DRAFT MANAGEMENT PLAN

MONTH	ACTION	RESPONSIBILITY
January – March	<ol style="list-style-type: none"> 1. Advocacy & training 2. Signing of work plans (By end of January) 3. Ensure that educators have access to collective agreement and training manual 4. Roles and responsibilities discussed 5. Develop implementation plan/schedule 6. Circuit Manager verifies 	Principal, SMT & educators as well as Circuit Manager
April - June	<ol style="list-style-type: none"> 1. Self-appraisal by educators 2. Pre-appraisal discussion 3. Lesson observation 4. Mid-year appraisal 5. Post-appraisal discussion 6. Principal verifies & signs 	Principal, SMT, educators, resource person (if applicable) as well as Circuit Manager
July - September	<ol style="list-style-type: none"> 1. Performance Review 	Principal, SMT, educators, resource person (if applicable) as well as Circuit Manager
October - December	<ol style="list-style-type: none"> 1. Self-appraisal by educators 2. Pre-appraisal discussion 3. Lesson Observation 4. Annual appraisal 4. Post-appraisal discussion 5. Principal verifies & signs 6. Verification and signing of annual appraisals 7. Submission of a completed composite score sheet to District 8. Circuit Manager verifies 	Principal, SMT, educators, resource person (if applicable) as well as Circuit Manager Principal

NB: The activities in the Management Plan will be supplemented by other activities such as development programmes, workshops, subject committee meetings, etc.

Circuit manager is responsible for the appraisal processes of all principals in his/her circuit as well as the verification of appraisal outcomes in schools.

Lesson observations may be conducted at any time as part of the process to support teachers.

GLOSSARY

Annual Appraisal

Annual Appraisal is aimed at assessing whether the educator's performance has complied with the required performance standards. It is where the performance required is clearly defined in advance in order to facilitate an annual final finding of performance.

Contextual Factors

Contextual factors are those factors that impact on an educator's performance and must be mutually agreed to between an educator and his/her supervisor.

Criteria

Each Performance Standard consists of 2 to 4 criteria. These criteria form the key deliverables for each performance standard and are used to evaluate the educator's performance. The criteria describe the conduct of the learners and educator or the skill of the educator related to effective performance.

Descriptors

Descriptors are phrases that aid in defining and outlining the expected conduct for a particular criterion. The descriptors are not an all-inclusive listing of conduct that might be associated with a criterion.

Goals

Goals are general statements that describe the desired outcome or purpose of any activity.

Informal Appraisal

An informal appraisal is aimed at assessing whether the educator's performance is complying with the required performance standards. Evidence from CASS/SBA and PDP are taken into account and support is provided, where necessary, by the Departmental Head. It is formative and emphasizes continuous improvement.

Mid-year Appraisal

Mid-year Appraisal is aimed at assessing whether the educator's performance has complied with the required performance standards. It is where the performance required is clearly defined in advance in order to facilitate a mid-year finding of performance and identify areas in which an educator's performance can improve.

Objectives

Objectives are statements that concretely and specifically describe a result to be achieved.

They serve as a basis for:

- Clarifying intentions;
- Planning
- Guiding activity towards a desired result, and
- Assessing achievement

Outcome

An outcome is a consequence of achieving specific objectives. It is assessed in terms of goals and the impact on the achievement of goals. It describes what changed as a result of effort.

Performance Criteria

Performance Criteria are those factors, characteristics or standards that will be used to describe and assess effective performance.

They may be general, such as key performance areas, or they may be very detailed and specific such as measurable targets.

Performance Measurement (PM)

Performance Measurement is the mid-year/annual process of appraising performance. It is:

- Part of a larger process of linking individual performance management and development to organizational goals;
- It is only one aspect of managing and developing the performance of individuals;
- The acyclic and recurring process aimed primarily at performance improvement through ongoing learning and development.

Performance Standards (PS)

Performance Standards are agreed on criteria to describe how well work must be done. They clarify the key performance areas of a job by describing what "working well" means.

Pre-appraisal discussion

The interaction between an SMT member/appraiser and the educator prior to a lesson observation or performance appraisal during which the purpose, performance standards, criteria, procedures and processes are discussed.

Post- appraisal discussion

A collaborative conference between an SMT member/appraiser and the educator during which feedback on the educator's performance is provided.

Rating Scale

A rating scale is a standard scale for rating educators' performance in relation to specific categories of performance.

School Management Plan

The school's annual plan of action facilitated and developed by the SMT for activities to be completed within stipulated timeframes.

Score

The total points allocated to each performance standard.

School Management Team (SMT)

For purposes of QMS, it consists of the principal, the deputy principal and departmental heads (Education Specialists).

Teacher

The teacher refers to an educator as explained in the Employment of Educators Act, 1998.

Work-plan

A document that outlines what activities will be undertaken by an employee within a particular year, as well as setting specific targets that need to be achieved.

ABBREVIATIONS

CAPS	: Curriculum Assessment Policy Statements
CEM	: Council of Education Ministers
DBE	: Department of Basic Education
DMC	: District Moderation Committee
ELRC	: Education Labour Relations Council
HEDCOM	: Heads of Education Departments Committee
ISPFTED	: The Integrated Strategic Planning Framework for Teacher Education and Development
IQMS	: Integrated Quality Management System
LOI	: Lesson Observation Instrument
NCS	: National Curriculum Statements
NSC	: National Senior Certificate
PDP	: Professional Development Portfolio
PM	: Performance Measurement
SIP	: School Improvement Plan
SMT	: School Management Team
SBA	: School-Based Assessment
QMS	: Quality Management System for school-based educators
WSE	: Whole School Evaluation

SECTION B: APPRAISAL INSTRUMENT
(Post Level 1)

Educators

1. INTRODUCTION

- 1.1 The performance appraisal of an educator (Post Level 1) must be conducted twice during the year, using the approved instrument provided in this section.
- 1.2 The two appraisals are conducted as follows:
 - Mid-year, and
 - Annual

2. THE INSTRUMENT

- 2.1 The QMS instrument (**Annexure A 1**) must be completed for each educator on post level 1.
- 2.2 The instrument should also be used for purposes of self-appraisal, the mid-year appraisal and final appraisal.
- 2.3 The instrument consists of 5 Performance Standards.
- 2.4 The Performance Standards in the instrument form the core elements of the job description for educators.
- 2.5 The criteria form the key deliverables for each Performance Standard.
- 2.6 The desired outcome/key objective of each criterion has been pegged with a maximum rating of 4.
- 2.7 When completing the instrument, the appraiser/supervisor must use the rating guide which provides the elements for the key descriptors for ratings that range from 1 – 4.
- 2.8 A rating that is less than the desired outcome will be influenced by the following factors:
 - There is no or insufficient evidence of a particular desired activity;
 - The desired activity is infrequent;
 - The desired activity is frequent but of poorer quality than desired;
 - The desired activity is infrequent and of poor quality, and
 - The desired activity may be frequent and of reasonable quality but is impacted by a negative attitude

3. PERFORMANCE STANDARDS

- 3.1 **Table 1** below shows the Performance Standards, the criteria and the desired outcome for PL 1 educators.

TABLE 1: PERFORMANCE STANDARDS AND CRITERIA FOR PL 1 EDUCATORS

Performance Standard	Criteria	The desired outcome
1. Creation of a positive learning environment	1) Learning and teaching environment	The use of learning and teaching environment enables all learners to be productively engaged in individual and cooperative learning.
	2) Classroom Management	Time and available resources are managed to promote optimal learning and teaching for all learners. Activities are efficiently supervised. Learners work together with the educator towards the achievement of relevant learning outcomes.
2. Curriculum knowledge, lesson planning and presentation	1) Knowledge of subject	Uses expert knowledge, in addition to Outcomes and Assessment Standards, to promote learner interest and research in the specific Learning Area/Subject.
	2) Planning and presentation	Effective use of planning instruments leads towards a higher form of learning/ understanding.
	3) Management of work schedule	Excellent management of content and context within the timeframes stipulated in the Work Schedule accompanied by relevant intervention strategies.
	4) Record keeping	Records are meticulously maintained and analysed to diagnose learner needs and teaching effectiveness. Records are used to adjust teaching strategies and improve learner achievement
3. Learner assessment and achievement	1) Feedback to learners	Provides feedback using a variety of strategies. Uses remedial and enrichment measures that instil confidence in learners to achieve intended learning outcomes.
	2) Knowledge and application of forms of assessment	Knows and uses a range of forms of assessment techniques to continuously maximise learner achievement. Methods of assessment are used to raise the standards of teaching and learning.
	3) Learner progress and achievement	Learners optimally achieve the relevant Learning Area/ Subject outcomes. Assessment results show outstanding levels of competence and achievement.
4. Professional Development	1) Participation in Continuous professional development	Participates fully and takes a leading role in initiating and delivering professional development activities.
	2) Educator professionalism	An educator is exemplary and truly displays the purpose and intent of the educators' code of professional ethics.
5. Extra-mural and co-curricular participation	1) Participation in extra-mural and co-curricular activities	Networks with relevant stakeholders and encourages the development of extra-mural or co-curricular activities.

4. Rating Scale, Descriptor, scores and percentages:

4.1 Post Level 1 Educators

- A 4-point rating scale is used when completing the instrument.

RATING	DESCRIPTOR	SCORE (Maximum Score = 152)	PERCENTAGE
1	Unacceptable: The level of performance does not meet minimum expectations and requires urgent intervention and support	0 – 75	0% - 49%
2	Acceptable: Satisfies minimum expectations. The level of performance is acceptable and is in line with the minimum expectations, but development and support are still required	76 - 105	50% - 69%
3	Good: Performance meets expectations, but some areas are still in need of development and support	106 – 128	70% - 84%
4	Outstanding: Performance exceeds expectations. Although performance is outstanding, continuous self-development and improvement are advised.	129 – 152	85% - 100%

Example 1: An example of the scores awarded to a Post level 1 educator:

1.	PERFORMANCE STANDARD 1	CREATION OF A POSITIVE LEARNING AND TEACHING ENVIRONMENT							
Criterion 1: Learning and teaching environment		Mid-Year				Annual			
a.	Seating arrangement promotes effective teaching and learning	1	2	3	4	1	2	3	<u>4</u>
b.	Classroom is tidy and clean	1	2	3	4	1	2	<u>3</u>	4
c.	Teaching and learning support material (eg. charts) are displayed and used in the classroom.	1	2	3	4	1	2	<u>3</u>	4
Criterion 2: Classroom Management									
a.	Is punctual and organized in class	1	2	3	4	1	2	3	<u>4</u>
b.	Ensures that learners are punctual and settle down quickly	1	2	3	4	1	2	3	<u>4</u>
c.	Communication between educator and learners reflects the mutual respect, cooperation and understanding	1	2	3	4	1	2	<u>3</u>	4
d.	Manages discipline effectively	1	2	3	4	1	2	<u>3</u>	4
Total						24			

- Calculating the annual score of an educator

NO.	PERFORMANCE STANDARD	MAXIMUM SCORE	EDUCATOR'S SCORE
1.	Creation of a positive learning and teaching environment	28	24
2.	Curriculum knowledge, lesson planning and presentation	48	32
3.	Learner assessment and achievement	28	18
4.	Professional development	36	25
5.	Extra-mural and co-curricular participation	12	6
	ANNUAL SCORE	152	105
	PERCENTAGE (Educator Score ÷ 152) x 100 =		69%

5. The documents that follow in the section below are:

- Annexure A 1:QMS Instrument (Post level 1)
- Annexure A 2:Composite Score Sheet (Post Level 1)

Annexure A 1

**QUALITY MANAGEMENT SYSTEM (QMS)
APPRAISAL INSTRUMENT
EDUCATOR: POST LEVEL 1**

(To be completed twice during the school year – June and November)

Section A: EDUCATOR AND SCHOOL INFORMATION

1. APPRAISEE

Surname		First names	
Designation		Persal number	
Highest Qualification		Specialization in a subject domain	
Grade / Subjects taught during the current appraisal year			

2. APPRAISER

Surname		First names	
Designation		Persal number	

3. SCHOOL

Name of school		Province	
Circuit/district		Principal's name	
Telephone		Cell No	

4. EDUCATOR'S BRIEF JOB DESCRIPTION (Subjects/Grades/Key areas of responsibility, etc)

Teaching and assessment responsibilities	Extra-mural activities	Administrative duties	Other: <i>(Please specify)</i>

SECTION B: APPRAISAL

Educator to be rated with a cross (X) for each descriptor

1. PERFORMANCE STANDARD 1		CREATION OF A POSITIVE LEARNING AND TEACHING ENVIRONMENT							
Criterion 1: Learning and teaching environment		Mid-Year				Annual			
a.	Seating arrangement promotes effective teaching and learning	1	2	3	4	1	2	3	4
b.	Classroom is tidy and clean	1	2	3	4	1	2	3	4
c.	Teaching and learning support material (e.g. charts) are displayed and used in the classroom.	1	2	3	4	1	2	3	4
Criterion 2: Classroom Management									
a.	Is punctual and organized in class	1	2	3	4	1	2	3	4
b.	Ensures that learners are punctual and settle down quickly	1	2	3	4	1	2	3	4
c.	Communication between educator and learners reflects the mutual respect, cooperation and understanding	1	2	3	4	1	2	3	4
d.	Manages discipline effectively	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

2. PERFORMANCE STANDARD 2		CURRICULUM KNOWLEDGE, LESSON PLANNING AND PRESENTATION							
Criterion 1: Knowledge of subject		Mid-Year				Annual			
a.	Has adequate subject knowledge and uses it effectively	1	2	3	4	1	2	3	4
b.	Sets appropriate tasks for learners at the level of the Grade	1	2	3	4	1	2	3	4
c.	Uses a variety of examples, LTSM and other teaching resources to facilitate learning	1	2	3	4	1	2	3	4
Criterion 2: Planning and presentation									
a.	The lesson is logical, coherent and meaningful to learners	1	2	3	4	1	2	3	4
b.	The lesson is built on past knowledge and experience of learners	1	2	3	4	1	2	3	4
c.	Time is well-managed during lesson presentation	1	2	3	4	1	2	3	4
d.	Encourages interactive learning including class discussions, learner questions and demonstrations	1	2	3	4	1	2	3	4
e.	Responds appropriately to learner questions and inputs	1	2	3	4	1	2	3	4
Criterion 3: Management of work schedule									
a.	The pace of the work is in line with time frames stipulated in the work schedule	1	2	3	4	1	2	3	4
b.	Number of tasks and activities are in line with CAPS	1	2	3	4	1	2	3	4
Criterion 4: Record-keeping									
a.	File/files neatly kept, organized and updated regularly	1	2	3	4	1	2	3	4
b.	Records of learner assessments are neatly kept, organized and updated regularly	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

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3. PERFORMANCE STANDARD 3		LEARNER ASSESSMENT AND ACHIEVEMENT							
Criterion 1: Feedback to learners		Mid-Year				Annual			
a.	Assessment tasks are marked and returned to learners timeously	1	2	3	4	1	2	3	4
b.	Feedback is meaningful and regular	1	2	3	4	1	2	3	4
c.	Feedback is incorporated in future lesson planning	1	2	3	4	1	2	3	4
Criterion 2: Knowledge and application of forms of assessment									
a.	Uses different forms of assessment in line with CAPS to test learner performance	1	2	3	4	1	2	3	4
b.	Intervention strategies accommodate learners with various learning abilities	1	2	3	4	1	2	3	4
Criterion 3: Learner progress and achievement									
a.	Learner results of various forms of the assessment show that they are attaining the set outcomes	1	2	3	4	1	2	3	4
b.	Remedial / Enrichment work supports learner progress	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

4. PERFORMANCE STANDARD 4		PROFESSIONAL DEVELOPMENT							
Criterion 1: Participation in continuous professional development		Mid-Year				Annual			
a.	Engages in on-going self-reflection and has set clear targets for the development	1	2	3	4	1	2	3	4
b.	Attends and participates in activities aimed at enhancing his/her professional and pedagogical skills	1	2	3	4	1	2	3	4
c.	Engages in research, develops educational materials, participates in sessions to train, guide, mentor and develop colleagues	1	2	3	4	1	2	3	4
Criterion 2: Educator professionalism									
a.	Comes to school regularly and on time	1	2	3	4	1	2	3	4
b.	Is always neatly dressed and presentable	1	2	3	4	1	2	3	4
c.	Conducts lessons as expected in line with the school timetable	1	2	3	4	1	2	3	4
d.	Adheres to deadlines e.g. marking, learner report cards, schedules, completion of tasks, etc	1	2	3	4	1	2	3	4
e.	Contributes positively towards school development and advancement	1	2	3	4	1	2	3	4
f.	Maintains good relations with stakeholders	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

5.	PERFORMANCE STANDARD 5	EXTRA-MURAL AND CO-CURRICULAR PARTICIPATION
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Criterion 1: Participation in extra-mural and co-curricular activities		Mid-Year				Annual			
a.	Keeps updated inventory/register of equipment under his/her care	1	2	3	4	1	2	3	4
b.	Manages and takes good care of equipment and facilities	1	2	3	4	1	2	3	4
c.	Is involved in extra-mural and co-curricular activities	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

5. Overall remarks:

5.1 Educator's comments on the appraisal

Mid-Year	Annual

5.2 Appraiser's comments

Mid-Year	Annual

5.3 Resource person's comments (Optional)

Mid-Year	Annual

5.4 Principal's comments

Mid-Year	Annual

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6. Recommendations

Mid-Year	Annual

7. Signatures

Mid-Year				
Name				
Designation	Educator	Appraiser/ Departmental Head	Resource Person	Principal
Signature				
Date				

Annual				
Name				
Designation	Educator	Appraiser/ Departmental Head	Resource Person	Principal
Signature				
Date				

SCHOOL STAMP

Annexure A 2

**QUALITY MANAGEMENT SYSTEM (QMS)
COMPOSITE SCORE SHEET: PL 1 EDUCATOR**

(To be submitted to the District Office by the end of the 4th quarter)

Educator		Date	
Persal Number		School	

PERFORMANCE STANDARD	MAXIMUM SCORE	EDUCATOR SCORE
1. Creation of a positive learning and teaching environment	28	
2. Curriculum knowledge, lesson planning and presentation	48	
3. Learner assessment and achievement	28	
4. Professional development	36	
5. Extra-mural and co-curricular participation	12	
FINAL SCORE	152	
PERCENTAGE <i>(Educator Score ÷ 152) x 100 =</i>		%

Comments:

I agree/do not agree with the overall performance rating.

SIGNATURES:

NAME	DESIGNATION	SIGNATURE	DATE
	Appraisee/Educator		
	Appraiser/Departmental Head		
	Resource person (if applicable)		
VALIDATED BY:			
	Principal		

SCHOOL STAMP

**SECTION C: WORK PLAN AND APPRAISAL INSTRUMENTS FOR EDUCATORS ON
POST LEVEL 2**

DEPARTMENTAL HEADS

1. INTRODUCTION

- 1.1 The appraisal of Departmental Heads (Post Level 2) must be conducted twice during the year, using the approved instrument provided in this section.
- 1.2 The two appraisals are conducted as follows:
 - Mid-Year, and
 - Annual

2. QMS WORK PLAN AND INSTRUMENT

- 2.1 The QMS work plan (**Annexure B 1**) and QMS instrument (**Annexure B 2**) must be completed for each Departmental Head.
- 2.2 The QMS work plan and instrument should also be used for purposes of self-appraisal, the mid-year appraisal and annual appraisal.
- 2.3 All Departmental Heads are required to complete a work plan at the beginning of each evaluation cycle.
- 2.4 A Departmental Head is evaluated on 6 Performance Standards;
- 2.5 The Performance Standards in the instrument form the core elements of the job description for Departmental Head.
- 2.6 The criteria form the key deliverables for each Performance Standard.
- 2.7 The desired outcome/key objective of each criterion has been pegged with a maximum rating of 4.
- 2.8 A rating that is less than the desired outcome will be influenced by the following factors:
 - There is no or insufficient evidence of a particular desired activity;
 - The desired activity is infrequent;
 - The desired activity is frequent but of poorer quality than desired;
 - The desired activity is infrequent and of poor quality, and
 - The desired activity may be frequent and of reasonable quality but is impacted by a negative attitude

3 PERFORMANCE STANDARDS

Table 2 below shows the 6 Performance Standards, the criteria and the desired outcome for PL 2 educators.

TABLE 2: PERFORMANCE STANDARDS, CRITERIA AND DESIRED OUTCOMES FOR PL 2 EDUCATORS (Departmental Head)

Performance Standard	Criteria	The desired outcome
1. Creation of a positive learning environment	1) Learning and teaching environment	The use of learning and teaching environment enables all learners to be productively engaged in individual and cooperative learning.
	2) Classroom Management	Time and available resources are managed to promote optimal learning and teaching for all learners. Activities are efficiently supervised. Learners work together with the educator towards the achievement of relevant learning outcomes.
2. Curriculum knowledge, lesson planning and presentation	1) Knowledge of subject	Uses expert knowledge, in addition to Outcomes and Assessment Standards, to promote learner interest and research in the specific Learning Area/Subject.
	2) Planning and presentation	Effective use of planning instruments leads towards a higher form of learning/ understanding.
	3) Management of work schedule	Excellent management of content and context within the timeframes stipulated in the Work Schedule accompanied by relevant intervention strategies.
	4) Record keeping	Records are meticulously maintained and analyzed to diagnose learner needs and teaching effectiveness. Records are used to adjust teaching strategies and improve learner achievement
3. Learner assessment and achievement	1) Feedback to learners	Provides feedback using a variety of strategies. Uses remedial and enrichment measures that instil confidence in learners to achieve intended learning outcomes.
	2) Knowledge and application of forms of assessment	Knows and uses a range of forms of assessment techniques to continuously maximise learner achievement. Methods of assessment are used to raise the standards of teaching and learning.
	3) Learner progress and achievement	Learners optimally achieve the relevant Learning Area/ Subject outcomes. Assessment results show outstanding levels of competence and achievement.
4. Professional development	1) Participation in Continuous professional development	Participates fully and takes a leading role in initiating and delivering professional development activities.
	2) Educator professionalism	An educator is exemplary and truly displays the purpose and intent of the educators' code of professional ethics.
5. Extra-mural and co-curricular participation	1) Participation in extra-mural and co-curricular activities	Networks with relevant stakeholders and encourages the development of extra-mural or co-curricular activities.

Performance Standard	Criteria	The desired outcome
6. Management of curriculum	1) Providing leadership, mentoring, support and development.	Regular classroom visits provide clear, valuable, guidance, support and constructive feedback to educators.
	2) Administration of resources and records	Efficient utilization and updating of resources, furniture and equipment are in good condition and well-maintained. Policy for furniture and equipment is implemented. Register for assets is well maintained.
	3) Decision-making and accountability.	Consults accepts total responsibility for all decisions even if they are proved to be wrong. Decisions are often proactive rather than reactive. Arrives at decisions creatively.
	4) Policy development and implementation	Policies are developed through wide consultation and according to the needs of the school. Implementation of both internal and external school policies is consistent and supports teaching and learning. Full compliance with policies at all levels.

4. Rating Scale, Descriptor, scores and percentages:

4.1 Post Level 2 Educators

- A 4-point rating scale is used when completing the instrument.

RATING	DESCRIPTOR	PL 2 SCORE (Maximum Score = 228)	PERCENTAGE
1	Unacceptable: The level of performance does not meet minimum expectations and requires urgent intervention and support	0 – 113	0% - 49%
2	Acceptable: Satisfies minimum expectations. The level of performance is acceptable and is in line with the minimum expectations, but development and support are still required	114 – 159	50% - 69%
3	Good: Performance meets expectations, but some areas are still in need of development and support	160 – 193	70% - 84%
4	Outstanding: Performance exceeds expectations. Although performance is outstanding, continuous self-development and improvement are advised.	194 – 228	85% - 100%

- Calculating the annual score of a PL 2 educator

NO.	PERFORMANCE STANDARD	MAXIMUM SCORE	EDUCATOR'S SCORE
1.	Creation of a positive learning and teaching environment	28	24
2.	Curriculum knowledge, lesson planning and presentation	48	32
3.	Learner assessment and achievement	28	18
4.	Professional development	36	25
5.	Extra-mural and co-curricular participation	12	6
6.	Management of curriculum	76	48
	ANNUAL SCORE	228	153
	PERCENTAGE (Educator Score ÷ 228) x 100 =		67%

5. The documents that follow in the section below are:

- Annexure B 1: QMS Work plan (Post level 2)
- Annexure B 2: QMS Appraisal Instrument (Post level 2)
- Annexure B 3: Composite Score Sheet (Post Level 2)

QMS WORK-PLAN (Departmental Head): Year **Annexure B 1**

NAME	SCHOOL	
PERIOD	DESIGNATION	Departmental Head

Performance Standard	KEY ACTIVITIES	TARGETS	TIME-FRAME	PERFORMANCE INDICATORS	CONTEXTUAL FACTORS
Management of the curriculum <i>(Performance Standard 6)</i>					

AGREED (Signatures):

Educator / Departmental Head	Date	Supervisor (Principal/Deputy Principal)	Date

SCHOOL STAMP

Annexure B 2

QUALITY MANAGEMENT SYSTEM (QMS)
DEPARTMENTAL HEAD: POST LEVEL 2

(To be completed twice during the school year – June and November)

Section A: EDUCATOR AND SCHOOL INFORMATION

1. APPRAISEE

Surname		First names	
Designation		Persal number	
Highest Qualification		Specialization in a subject domain	
Grade / Subjects taught during the current appraisal year			

2. APPRAISER

Surname		First names	
Designation		Persal number	

3. SCHOOL

Name of school		Province	
Circuit/district		Principal's name	
Telephone		Cell No	

4. EDUCATOR'S BRIEF JOB DESCRIPTION (Subjects/Grades/Key areas of responsibility, etc.)

Teaching and assessment responsibilities	Extra-mural activities	Management and Administrative duties	Other: <i>(Please specify)</i>

SECTION B: APPRAISAL

Educator to be rated with a cross (X) for each descriptor

1.	PERFORMANCE STANDARD 1	CREATION OF A POSITIVE LEARNING AND TEACHING ENVIRONMENT							
Criterion 1: Learning and teaching environment		Mid-Year				Annual			
a.	Seating arrangement promotes effective teaching and learning	1	2	3	4	1	2	3	4
b.	Classroom is tidy and clean	1	2	3	4	1	2	3	4
c.	Teaching and learning support material (eg. charts) are displayed and used in the classroom.	1	2	3	4	1	2	3	4
Criterion 2: Classroom Management									
a.	Is punctual and organized in class	1	2	3	4	1	2	3	4
b.	Ensures that learners are punctual and settle down quickly	1	2	3	4	1	2	3	4
c.	Communication between educator and learners reflects the mutual respect, cooperation and understanding	1	2	3	4	1	2	3	4
d.	Manages discipline effectively	1	2	3	4	1	2	3	4
Total									
Comments:									
Mid-year					Annual				

2.	PERFORMANCE STANDARD 2	CURRICULUM KNOWLEDGE, LESSON PLANNING AND PRESENTATION							
Criterion 1: Knowledge of subject		Mid-Year				Annual			
a.	Has adequate subject knowledge and uses it effectively	1	2	3	4	1	2	3	4
b.	Sets appropriate tasks for learners at the level of the Grade	1	2	3	4	1	2	3	4
c.	Uses a variety of examples, LTSM and other teaching resources to facilitate learning	1	2	3	4	1	2	3	4
Criterion 2: Planning and presentation									
a.	The lesson is logical, coherent and meaningful to learners	1	2	3	4	1	2	3	4
b.	The lesson is built on past knowledge and experience of learners	1	2	3	4	1	2	3	4
c.	Time is well-managed during lesson presentation	1	2	3	4	1	2	3	4
d.	Encourages interactive learning including class discussions, learner questions and demonstrations	1	2	3	4	1	2	3	4
e.	Responds appropriately to learner questions and inputs	1	2	3	4	1	2	3	4
Criterion 3: Management of work schedule									
a.	The pace of the work is in line with time frames stipulated in the work schedule	1	2	3	4	1	2	3	4
b.	Number of tasks and activities are in line with NCS/CAPS	1	2	3	4	1	2	3	4
Criterion 4: Record-keeping									
a.	File/files neatly kept, organized and updated regularly	1	2	3	4	1	2	3	4
b.	Records of learner assessments are neatly kept, organized and updated regularly	1	2	3	4	1	2	3	4
Total									
Comments:									
Mid-year					Annual				

3. PERFORMANCE STANDARD 3		LEARNER ASSESSMENT AND ACHIEVEMENT							
Criterion 1: Feedback to learners		Mid-Year				Annual			
a.	Assessment tasks are marked and returned to learners timeously	1	2	3	4	1	2	3	4
b.	Feedback is meaningful and regular	1	2	3	4	1	2	3	4
c.	Feedback is incorporated in future lesson planning	1	2	3	4	1	2	3	4
Criterion 2: Knowledge and application of forms of assessment									
a.	Uses different forms of assessment in line with CAPS to test learner performance	1	2	3	4	1	2	3	4
b.	Intervention strategies accommodate learners with various learning abilities	1	2	3	4	1	2	3	4
Criterion 3: Learner progress and achievement									
a.	Learner results of various forms of the assessment show that they are attaining the set outcomes	1	2	3	4	1	2	3	4
b.	Remedial / Enrichment work supports learner progress	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

4. PERFORMANCE STANDARD 4 PROFESSIONAL DEVELOPMENT

Criterion 1: Participation in continuous professional development		Mid-Year				Annual			
a.	Engages in on-going self-reflection and has set clear targets for the development	1	2	3	4	1	2	3	4
b.	Attends and participates in activities aimed at enhancing his/her professional and pedagogical skills	1	2	3	4	1	2	3	4
c.	Engages in research, develops educational materials, participates in sessions to train, guide, mentor and develop colleagues	1	2	3	4	1	2	3	4
Criterion 2: Educator professionalism									
a.	Comes to school regularly and on time	1	2	3	4	1	2	3	4
b.	Is always neatly dressed and presentable	1	2	3	4	1	2	3	4
c.	Conducts lessons as expected in line with the school timetable	1	2	3	4	1	2	3	4
d.	Adheres to deadlines e.g. marking, learner report cards, schedules, completion of tasks, etc.	1	2	3	4	1	2	3	4
e.	Contributes positively towards school development and advancement	1	2	3	4	1	2	3	4
f.	Maintains good relations with stakeholders	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

5.	PERFORMANCE STANDARD 5	EXTRA-MURAL AND CO-CURRICULAR PARTICIPATION
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Criterion 1: Participation in extra-mural and co-curricular activities		Mid-Year				Annual			
a.	Keeps updated inventory/register of equipment under his/her care	1	2	3	4	1	2	3	4
b.	Manages and takes good care of equipment and facilities	1	2	3	4	1	2	3	4
c.	Is involved in extra-mural and co-curricular activities	1	2	3	4	1	2	3	4
Total									

Comments:

Mid-year	Annual

6.	PERFORMANCE STANDARD 6	MANAGEMENT OF THE CURRICULUM
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Criterion 1: Providing leadership, mentoring, support and development		Mid-Year				Annual			
a.	Conducts regular classroom visits to provide support and development to educators	1	2	3	4	1	2	3	4
b.	Monitors class attendance by educators and learners	1	2	3	4	1	2	3	4
c.	Controls educators' work (checks preparations, quality of tests, marking of tasks, etc.)	1	2	3	4	1	2	3	4
d.	Moderates learners' tasks by checking books regularly	1	2	3	4	1	2	3	4
e.	Assesses the performance of educators regularly and provides feedback, mentoring and support	1	2	3	4	1	2	3	4
f.	Manages underperformance	1	2	3	4	1	2	3	4
g.	Organizes workshops and training sessions for educators	1	2	3	4	1	2	3	4
Criterion 2: Administration of resources and records									
a.	Equipment and furniture are kept in good condition and is working (e.g. computers, photocopiers, projectors, tables, chairs, etc.)	1	2	3	4	1	2	3	4
b.	Infrastructure is well maintained (clean wall, doors, door handles, window panes, playing grounds, etc.)	1	2	3	4	1	2	3	4
c.	Budgets and records of expenditure are kept	1	2	3	4	1	2	3	4
d.	Keeps updated inventory/register of equipment in his/her care	1	2	3	4	1	2	3	4
e.	A filing system of all essential records is kept and updated regularly	1	2	3	4	1	2	3	4
Criterion 3: Decision-making and accountability									
a.	Displays good planning, monitoring and evaluation skills	1	2	3	4	1	2	3	4
b.	Takes full responsibility for decisions taken, is honest and decisive	1	2	3	4	1	2	3	4

c.	Consults stakeholders and communicates effectively with them.	1	2	3	4		1	2	3	4
d.	Manages conflict	1	2	3	4		1	2	3	4
e.	Takes firm action against abuse and other forms of irresponsible and unprofessional conduct	1	2	3	4		1	2	3	4
Criterion 4: Policy development and implementation										
a.	Key policies are in place and implemented effectively	1	2	3	4		1	2	3	4
b.	New policies are developed, implemented and reviewed	1	2	3	4		1	2	3	4
Total										

Comments:

Mid-year	Annual

1. Overall Remarks:

5.1. Educator's comments on the appraisal

Mid-Year	Annual

5.2 Appraiser's comments

Mid-Year	Annual

5.3 Resource person's comments (Optional)

Mid-Year	Annual

5.4 Principal's comments

PAM Chapter K

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Mid-Year	Annual

6. RECOMMENDATIONS

Mid-Year	Annual

7. SIGNATURES

	Mid-Year			
Name				
Designation	Educator/ Departmental Head	Supervisor/Principal/ Deputy Principal	Resource person	Principal
Signature				
Date				

	Annual			
Name				
Designation	Educator/ Departmental Head	Supervisor/Principal/ Deputy Principal	Resource person	Principal
Signature				
Date				

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Annexure B 3

**QUALITY MANAGEMENT SYSTEM (QMS)
COMPOSITE SCORE SHEET: DEPARTMENTAL HEAD**
(To be submitted to the District Office by the end of the 4th quarter)

Educator		Date	
Persal Number		School	

PERFORMANCE STANDARD	MAXIMUM SCORE	EDUCATOR SCORE
1. Creation of a positive learning and teaching environment	28	
2. Curriculum knowledge, lesson planning and presentation	48	
3. Learner assessment and achievement	28	
4. Professional development	36	
5. Extra-mural and co-curricular participation	12	
6. Management of the curriculum	76	
FINAL SCORE	228	
PERCENTAGE (<i>Educator Score ÷ 228</i>) x 100 =		%

Comments:

--

I agree/do not agree with the overall performance rating.

SIGNATURES:

NAME	DESIGNATION	SIGNATURE	DATE
	Educator/ Departmental Head		
	Supervisor/Principal/Deputy Principal		
	Resource person (if applicable)		
VALIDATED BY:			
	Principal		

<i>SCHOOL STAMP</i>

**SECTION D: WORK PLAN AND APPRAISAL INSTRUMENTS FOR EDUCATORS ON
POST LEVEL 3**

DEPUTY PRINCIPALS

1. INTRODUCTION

- 1.1 The performance appraisal of a deputy principal must be conducted twice during the year, using the approved instrument provided in this section.
- 1.2 Deputy Principals have a choice in selecting the number of descriptors within the 7 performance standards in the appraisal instrument.

2. QMS WORK PLAN AND INSTRUMENT

- 2.1 Deputy Principals (PL 3) are required to complete a work plan (**Annexure C 1**) at the beginning of each evaluation cycle.
- 2.2 The QMS instrument (**Annexure C2**) should be used for the appraisal of Deputy Principals.
- 2.3 The work plan and instrument should also be used for purposes of self-appraisal, the mid-year appraisal and final appraisal.
- 2.4 The Performance Standards in the instrument form the core elements of the job description for deputy principals and principals.
- 2.5 The criteria form the key deliverables for each of the 7 Performance Standards.
- 2.6 The desired outcome/key objective of each criterion has been pegged with a maximum rating of 4.
- 2.7 A rating that is less than the desired outcome will be influenced by the following factors:
- There is no or insufficient evidence of a particular desired activity;
 - The desired activity is infrequent;
 - The desired activity is frequent but of poorer quality than desired;
 - The desired activity is infrequent and of poor quality, and
 - The desired activity may be frequent and of reasonable quality but is impacted by a negative attitude

3. APPRAISAL OF DEPUTY PRINCIPALS

- 3.1 During the signing of a work plan, the Deputy Principal must also select and agree with the supervisor (principal) on the descriptors in the QMS instrument (**Annexure C 2**) that will be applicable for his/her self-appraisal, mid-year appraisal and annual appraisal.
- 3.2 The following descriptors are compulsory:
- All 35 descriptors in Performance Standards 1, 3 and 4.
- 3.3 In addition, a total of 24 descriptors from Performance Standards 2, 5, 6 and 7 should be selected as follows:

Performance Standard	Number of descriptors to be agreed upon for appraisal
1	<i>All descriptors are compulsory</i>
2	10 descriptors
3	<i>All descriptors are compulsory</i>
4	<i>All descriptors are compulsory</i>
5	10 descriptors
6	2 descriptors
7	2 descriptors

3.4 The Deputy Principal should be appraised on a total of **59** descriptors (35 compulsory descriptors and 24 selected descriptors) in the 7 Performance Standards.

4. PERFORMANCE STANDARDS

Table 3 below shows the 7 Performance Standards, the criteria and the desired outcomes for PL 3 educators.

TABLE 3: PERFORMANCE STANDARDS AND CRITERIA FOR PL 3 EDUCATORS (Deputy Principals)

Performance Standard	Criteria	The desired outcome
1. Leading the learning school	1) Classroom teaching	Effective use is made of all resources to ensure that learners are motivated to perform optimally.
	2) Support for the learning school	The support of all stakeholders has been secured and there is evidence that a quality teaching and learning environment is established/being improved
2. Shaping the direction and development of the school	1) Planning	Effective use is made of all planning resources and techniques (data, budgets, consultations, policies etc).
	2) School governing body and the broader school community	SGB is established and functioning. SGB is supported in the performance of its functions in terms of SASA. Partnerships are set up to support the development of the school
3. Managing quality and securing accountability	1) Securing accountability	The use of LTSM is monitored. A textbook retrieval system is in place and implemented effectively. The work of the SMT is monitored regularly. Systems are in place to a) monitor educator and learner attendance, and b) address improper conduct and dress code of educators and learners
	2) Managing the quality of teaching and learning	Departmental policies with regard to assessment administration are followed. Marking and moderation of learner assessments are monitored regularly. Learner assessment outcomes are analysed, intervention strategies developed and implemented
4. Developing and empowering self and others	1) Staff	Staff development initiatives are functioning. Regular classroom visits provide constructive feedback, guidance and support. Teacher appraisal systems comply with policy and the results are valid, reliable and fair.
	2) Self	Regular participation in activities aimed at enhancing personal and professional growth. Conduct is exemplary.
5. Managing the school as an organisation	1) Financial management	School's finances are managed by applying the necessary controls to optimise the use of the fund. Protocols are followed in developing the school budget, including approvals by the SGB and parent community. All prescription is SASA and departmental directives are adhered to.
	2) General institutional management and administration	The logbook contains a record of important events in the school. The school has effective and efficient systems in place to manage correspondence and other forms of communication, the systems are properly maintained and provide easy access for authorised persons. School provides accurate statistics to the district office.
	3) Management of infrastructure	The school has a safe and secure environment with clear access controls. Existing resources and physical infrastructure are used effectively. Use and safekeeping of all movable and immovable

Performance Standard	Criteria	The desired outcome
		assets are monitored regularly. School buildings, ablution facilities and grounds are well maintained.
6. Managing human resources (staff) in the school	1) Managing human resources (educators and support staff) in the school	Departmental HR policies are understood, explained to staff and implemented correctly. Delays in addressing staff queries, grievances, disciplinary issues are avoided.
7. Management and advocacy of extra-mural activities	1) Management and advocacy of extra-mural activities	Networks with relevant stakeholders and encourages the development of extra-mural or co-curricular activities.

4. Rating Scale, Descriptor, scores and percentages:

4.1 Post Level 3 Educators

- A 4-point rating scale is used when completing the instrument.

RATING	DESCRIPTOR	DEPUTY PRINCIPAL SCORE	PERCENTAGE
	Maximum score	236	%
1	Unacceptable: The level of performance does not meet minimum expectations and requires urgent intervention and support	0 - 117	0% - 49%
2	Acceptable: Satisfies minimum expectations. The level of performance is acceptable and is in line with the minimum expectations, but development and support are still required	118 – 164	50% - 69%
3	Good: Performance meets expectations, but some areas are still in need of development and support	165 – 199	70% - 84%
4	Outstanding: Performance exceeds expectations. Although performance is outstanding, continuous self-development and improvement are advised.	200 - 236	85% - 100%

- Calculating the annual score of a PL 3 educator (Example):

NO.	PERFORMANCE STANDARD	MAXIMUM SCORE	DEPUTY PRINCIPAL'S SCORE
1.	Leading the learning school	60	39
2.	Shaping the direction and development of the school	40	31
3.	Managing quality and securing accountability	44	38
4.	Developing and empowering self and others	36	30
5.	Managing the school as an organisation	40	31
6.	Managing human resources (staff) in the school	8	6
7.	Managing and advocacy of extra-mural activities	8	5
	ANNUAL SCORE: Deputy Principal	236	180
	Percentage: $(180 \div 236 \times 100 = \quad)$		76 %

The documents that follow in the section below are:

- Annexure C 1: QMS Work plan (Deputy Principal)
- Annexure C 2: QMS Appraisal Instrument (Deputy Principal)
- Annexure C 3: Composite Score Sheet (Deputy Principal)

QMS WORK-PLAN (PL 3: Deputy Principal): Year Annexure C 1

NAME	SCHOOL
PERIOD	DESIGNATION Deputy Principal

Performance Standard	KEY ACTIVITIES	TARGETS	TIME-FRAME	PERFORMANCE INDICATORS	CONTEXTUAL FACTORS
1. Leading the learning school					
2. Shaping the direction and development of the school					
3. Managing quality and securing accountability					
4. Developing and empowering self and others					
5. Managing the school as an organization					
6. Managing human resources (staff) in the school					
7. Management and advocacy of extra-mural activities					

AGREED (Signatures):

PAM Chapter K

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Appraiser (Deputy Principal)	Date	Appraiser (Principal)	Date	Appraiser (Principal)	Date	Appraiser (Deputy Principal)

SCHOOL STAMP

Annexure C 2

**QUALITY MANAGEMENT SYSTEM (QMS)
APPRAISAL INSTRUMENT
DEPUTY PRINCIPAL: POST LEVEL 3**

(To be completed twice during the school year – June and November)

Section A: EDUCATOR AND SCHOOL INFORMATION

1. APPRAISEE

Surname	First names
Designation	Persal number
Highest Qualification	Specialization in a subject domain
Grade / Subjects taught during the current appraisal year	

2. APPRAISER

Surname	First names
Designation	Persal number

3. SCHOOL

Name of school	Province
Circuit/district	Principal's name
Telephone	Cell No

4. EDUCATOR'S BRIEF JOB DESCRIPTION (Subjects/Grades/Key areas of responsibility, etc)

Teaching and assessment responsibilities	Extra-mural activities	Management and Administrative duties	Other: <i>(Please specify)</i>
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5. AREAS OF APPRAISAL

Performance Standard	Max Score	
	Deputy Principal	Principal (P 1A & P 1B)
1. Leading the learning school	60	60
2. Shaping the direction and development of the school	40	52
3. Managing quality and securing accountability	44	44
4. Developing and empowering self and others	36	36
5. Managing the school as an organization	40	56
6. Managing human resources (staff) in the school	8	20
7. Management and advocacy of extra-mural activities	8	16
TOTAL	236	284

SECTION B: APPRAISAL

Deputy Principal to be rated with a cross (X) for each descriptor

1. PERFORMANCE STANDARD 1 LEADING THE LEARNING SCHOOL

*NB: Appraisal to be conducted on **all descriptors** in Performance Standard 1*

Criterion 1: Classroom teaching		Mid-Year				Annual				
a.	Learning and teaching environment	1	2	3	4		1	2	3	4
b.	Classroom Management	1	2	3	4		1	2	3	4
c.	Knowledge of the subject	1	2	3	4		1	2	3	4
d.	Planning and presentation	1	2	3	4		1	2	3	4
e.	Management of work schedule	1	2	3	4		1	2	3	4
f.	Record keeping	1	2	3	4		1	2	3	4
g.	Feedback to learners	1	2	3	4		1	2	3	4
h.	Knowledge and application of forms of assessment	1	2	3	4		1	2	3	4
i.	Learner progress and achievement	1	2	3	4		1	2	3	4
Criterion 2 Support for the learning school										
a.	Enlists the support of parents and community members as partners in learning	1	2	3	4		1	2	3	4
b.	Communicates (provides feedback) with all stakeholders on the academic performance of the school	1	2	3	4		1	2	3	4
c.	Motivates learners to achieve academically	1	2	3	4		1	2	3	4
d.	Ensures that there are functional curriculum structures in the school.	1	2	3	4		1	2	3	4
e.	Promotes ICT learning	1	2	3	4		1	2	3	4
f.	Manages conflict in order to maintain a healthy teaching and learning environment	1	2	3	4		1	2	3	4
Total	Maximum Score					60				

Comments:

Mid-year	Annual

2.	PERFORMANCE STANDARD 2	SHAPING THE DIRECTION AND DEVELOPMENT OF THE SCHOOL
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NB: Appraisal to be conducted on 10 selected descriptors based on the allocated responsibilities in Performance Standard 2

Criterion 1: Planning		Mid-Year				Annual				
a.	The school has developed vision and mission statements which are relevant (to the school community) and achievable.	1	2	3	4		1	2	3	4
b.	Implementation of school improvement plan (SIP)	1	2	3	4		1	2	3	4
c.	Ensures that school has a safe and secure environment	1	2	3	4		1	2	3	4
d.	Implements transparent decision making structures – accepts responsibility for decisions taken	1	2	3	4		1	2	3	4
e.	Ensures that planning is based on data collected on a range of school activities	1	2	3	4		1	2	3	4
f.	Planning is done on time	1	2	3	4		1	2	3	4
g.	School analyses the results of various forms of assessment and sets clear targets for improvement	1	2	3	4		1	2	3	4
Criterion 2: School Governing Body and the broader school community										
a.	Ensures that the school has a functioning SGB	1	2	3	4		1	2	3	4
b.	Renders assistance to the SGB in terms of the areas listed in SASA 16A, excluding finances (<i>Refer to PS 5 for Finances</i>)	1	2	3	4		1	2	3	4
c.	Informs the SGB about policy and legislation	1	2	3	4		1	2	3	4
d.	The school has developed the various policies as required by SASA, which are aligned with the requirements of various legislation and departmental policies	1	2	3	4		1	2	3	4
e.	Networks with the community and builds partnerships to support the development of the school	1	2	3	4		1	2	3	4
f.	Liaises with relevant government departments (e.g. Dept. of Health) as required	1	2	3	4		1	2	3	4
Total	Maximum Score					40				

Comments:

Mid-year	Annual

3.	PERFORMANCE STANDARD 3	MANAGING QUALITY AND SECURING ACCOUNTABILITY
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*NB: Appraisal to be conducted on **all descriptors** in Performance Standard 3*

Criterion 1: Securing accountability		Mid-Year					Annual				
a.	Ensures safekeeping of all movable and immovable assets	1	2	3	4		1	2	3	4	
b.	Ensures completion of all attendance registers and takes appropriate action where necessary (Staff and learners)	1	2	3	4		1	2	3	4	
c.	Ensures that LTSMs are used effectively	1	2	3	4		1	2	3	4	
d.	A textbook retrieval system is in place and is properly implemented	1	2	3	4		1	2	3	4	
e.	Leads and monitors the work of the School Management Team	1	2	3	4		1	2	3	4	
f.	Addresses unprofessional and improper conduct of educators and learners	1	2	3	4		1	2	3	4	
Criterion 2: Managing the quality of teaching and learning											
a.	Follows departmental policies with regard to assessment administration (e.g. NSC, SBA)	1	2	3	4		1	2	3	4	
b.	Monitors marking and moderation of learner assessments	1	2	3	4		1	2	3	4	
c.	Ensures that efficient systems are in place for examinations/assessments	1	2	3	4		1	2	3	4	
d.	Consolidates and analyses learners' assessment outcomes and develops appropriate intervention strategies	1	2	3	4		1	2	3	4	
e.	Promotes (provides leadership) and monitors school learner intervention strategies	1	2	3	4		1	2	3	4	
Total	Maximum Score						44				

Comments:

Mid-year	Annual

4.	PERFORMANCE STANDARD 4	DEVELOPING AND EMPOWERING SELF AND OTHERS
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*NB: Appraisal to be conducted on **all descriptors** in Performance Standard 3*

Criterion 1: Staff		Mid-Year				Annual				
a.	Staff training programmes planned and implemented	1	2	3	4	1	2	3	4	
b.	Provides leadership and oversees mentoring, coaching and general support to staff	1	2	3	4	1	2	3	4	
c.	Manages underperformance	1	2	3	4	1	2	3	4	
d.	Promotes teacher appraisal practices in terms of applicable policy/ collective agreement	1	2	3	4	1	2	3	4	
e.	Monitors staff appraisal and verifies evidence	1	2	3	4	1	2	3	4	
f.	Conducts classroom observations to provide support and development of educators	1	2	3	4	1	2	3	4	
g.	Ensures that departmental circulars and other relevant information are brought to the attention of the staff	1	2	3	4	1	2	3	4	
Criterion 2: Self										
a.	Attends and participates in departmental, union and other professional activities aimed at enhancing his/her professional skills	1	2	3	4	1	2	3	4	
b.	Professional conduct with reference to punctuality, presentable appearance, the respect shown to others	1	2	3	4	1	2	3	4	
Total	Maximum Score					36				

Comments:

Mid-year	Annual

5. PERFORMANCE STANDARD 5 | MANAGING THE SCHOOL AS AN ORGANISATION

NB: Appraisal to be conducted on 10 selected descriptors based on the allocated responsibilities in Performance Standard 5

Criterion 1: Financial Management		Mid-Year					Annual			
a.	Manages school's finances in terms of applicable legislation (SASA) and policy	1	2	3	4		1	2	3	4
b.	Provides the necessary guidance to the SGB i.t.o finances	1	2	3	4		1	2	3	4
c.	Follows protocols in developing the school budget	1	2	3	4		1	2	3	4
d.	Takes all reasonable steps to prevent financial mismanagement and corruption	1	2	3	4		1	2	3	4
e.	Supports the school's fundraising efforts	1	2	3	4		1	2	3	4
Criterion 2: General institutional management and administration										
a.	Maintains a logbook containing a record of important events at the schools	1	2	3	4		1	2	3	4
b.	Ensures that systems are in place for the management of all correspondence	1	2	3	4		1	2	3	4
c.	Ensures that sensitive information on learners and teachers are properly maintained	1	2	3	4		1	2	3	4
d.	Maintains a filing and storage system	1	2	3	4		1	2	3	4
e.	Submits reports to the department/districts in terms of national and provincial policies	1	2	3	4		1	2	3	4
Criterion 3: Management of infrastructure										
a.	Uses existing resources and physical infrastructure optimally	1	2	3	4		1	2	3	4
b.	Monitors use and safekeeping of all movable and immovable assets in the school	1	2	3	4		1	2	3	4
c.	Makes regular physical infrastructure inspections	1	2	3	4		1	2	3	4
d.	School buildings, ablutions facilities and grounds are properly maintained	1	2	3	4		1	2	3	4
Total	Maximum Score					40				

Comments:

Mid-year	Annual

6.	PERFORMANCE STANDARD 6	MANAGING HUMAN RESOURCES (STAFF) IN THE SCHOOL
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NB: Appraisal to be conducted on 2 selected descriptors based on the allocated responsibilities

Criterion 1: Managing human resources (educators and support staff) in the school		Mid-Year				Annual			
a.	Makes every effort to fill vacant posts in terms of departmental policy	1	2	3	4	1	2	3	4
b.	Assists staff members with solving conditions of service problems	1	2	3	4	1	2	3	4
c.	Ensures that a positive labour environment exists at the school	1	2	3	4	1	2	3	4
d.	Deals with grievances of staff in terms of the relevant ELRC/PSCBC resolutions	1	2	3	4	1	2	3	4
e.	Ensures that prescribed procedures are followed with regard to any disciplinary action	1	2	3	4	1	2	3	4
Total		Maximum Score				8			

Comments :

Mid-year	Annual

7.	PERFORMANCE STANDARD 7	MANAGEMENT AND ADVOCACY OF EXTRA-MURAL ACTIVITIES
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NB: Appraisal to be conducted on 2 selected descriptors based on the allocated responsibilities

Criterion 1: Management and advocacy of extra-mural activities		Mid-Year					Annual			
a.	Ensures that the school offers extra-mural activities to its learners	1	2	3	4		1	2	3	4
b.	Encourages and supports learners to take part in extra-mural activities	1	2	3	4		1	2	3	4
c.	Ensures educator participation in extra-mural activities	1	2	3	4		1	2	3	4
d.	Oversees organisation of extra-mural activities	1	2	3	4		1	2	3	4
e.	Involves community with extra-mural activities, where applicable	1	2	3	4		1	2	3	4
Total		Maximum Score				8				

Comments:

Mid-year	Annual

1. Overall Remarks

1.1 Deputy Principal's comments on the appraisal

Mid-Year	Annual

1.2 Resource person's comments on the appraisal (Optional)

Mid-Year	Annual

1.3 Principal's comments

Mid-Year	Annual

2. Recommendations (Principal)

Mid-Year	Annual

3. SIGNATURES

Mid-Year			
Name			
Designation	Deputy Principal	Resource person	Principal
Signature			
Date			

Annual			
Name			
Designation	Deputy Principal	Resource person	Principal
Signature			
Date			

SCHOOL STAMP

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Annexure C 3

**QUALITY MANAGEMENT SYSTEM (QMS)
COMPOSITE SCORE SHEET: PL 3**

Deputy Principal

(To be submitted to the District Office by the end of the 4th quarter)

Educator		Date	
Persal Number		School	

NO.	PERFORMANCE STANDARD	SCORES	
		MAX SCORE	FINAL SCORE
1.	Leading the learning school	60	
2.	Shaping the direction and development of the school	40	
3.	Managing quality and securing accountability	44	
4.	Developing and empowering self and others	36	
5.	Managing the school as an organisation	40	
6.	Managing human resources (staff) in the school	8	
7.	Management and advocacy of extra-mural activities	8	
	TOTAL	236	
	ANNUAL SCORE (Final Score: Total ÷ 236 x 100)		%

Comments:

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I agree/do not agree with the overall performance rating.

SIGNATURES:

NAME	DESIGNATION	SIGNATURE	DATE
	Deputy Principal		
	Resource Person (if applicable)		
	Principal		
VALIDATED BY:			

	District Director		
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SCHOOL/DISTRICT STAMP

**SECTION E: WORK PLAN AND APPRAISAL INSTRUMENTS FOR EDUCATORS ON
POST LEVEL 4**

PRINCIPALS

1. INTRODUCTION

- 1.1 The performance appraisal of a principal must be conducted twice during the year, using the approved instrument provided in this section.
- 1.2 Different weighting scales are applicable to the final appraisal scores of Principals who teach 30% or more of the scheduled teaching time and those who teach less than 30% of the scheduled teaching time.

2. QMS WORK PLAN AND INSTRUMENT

- 2.1 Principals (PL 4) are required to complete a work plan (**Annexure D1**) at the beginning of each evaluation cycle.
- 2.2 The QMS instrument (**Annexure D2**) should be used for the appraisal of principals.
- 2.3 The work plan and instrument should also be used for purposes of self-appraisal, the mid-year appraisal and final appraisal.
- 2.4 The Performance Standards in the instrument form the core elements of the job description for deputy principals and principals.
- 2.5 The criteria form the key deliverables for each of the 7 Performance Standards.
- 2.6 The desired outcome/key objective of each criterion has been pegged with a maximum rating of 4.
- 2.7 A rating that is less than the desired outcome will be influenced by the following factors:
 - There is no or insufficient evidence of a particular desired activity;
 - The desired activity is infrequent;
 - The desired activity is frequent but of poorer quality than desired;
 - The desired activity is infrequent and of poor quality, and
 - The desired activity may be frequent and of reasonable quality but is impacted by a negative attitude

3. APPRAISAL OF PRINCIPALS

- 3.1 During the signing of a work plan, the Principal and his/her supervisor (Circuit Manager) must also discuss the appraisal instrument (Annexure D 2) that will be applicable for his/her self-appraisal, mid-year appraisal and annual appraisal.
- 3.2 Principals have a choice in selecting 4 out of 5 descriptors in Performance Standard 7.
- 3.3 All other descriptors in Performance Standards 1 – 6 are compulsory.
- 3.4 Two different weighting scales are applicable to the final appraisal scores of Principals who teach 30% or more of the scheduled teaching time and those who teach less than 30% of the scheduled teaching time.

The scale is applied as follows:

Principal (P 1A)	Principals who teach 30% or more of the scheduled teaching time.
Principal (P 1B)	Principals who teach less than 30% of the scheduled teaching time.

The weighting of the scores allocated for the above 2 categories of principals are as follows:

	Classroom Teaching (Performance Standard 1)	Management and Leadership (Performance Standards 2 – 7)
Principal (P 1A)	40%	60%
Principal (P 1B)	20%	80%

3.5 An example of establishing 30% of scheduled teaching time is shown in the table below:

Weekly teaching (instructional) time allocation as per school time-table	30% of teaching time
27,5 hours	8.25 hours
25 hours	7,5 hours

4. PERFORMANCE STANDARDS

Table 4 below shows the 7 Performance Standards, the criteria and the desired outcomes for PL 4 educators (Principals):

TABLE 4: PERFORMANCE STANDARDS AND CRITERIA FOR PL4 EDUCATORS (Principals)

Performance Standard	Criteria	The desired outcome
1. Leading the learning school	1) Classroom teaching	Effective use is made of all resources to ensure that learners are motivated to perform optimally.
	2) Support for the learning school	The support of all stakeholders has been secured and there is evidence that a quality teaching and learning environment is established/being improved
2. Shaping the direction and development of the school	1) Planning	Effective use is made of all planning resources and techniques (data, budgets, consultations, policies etc).
	2) School governing body and the broader school community	SGB is established and functioning. SGB is supported in the performance of its functions in terms of SASA. Partnerships are set up to support the development of the school
3. Managing quality and securing accountability	1) Securing accountability	The use of LTSM is monitored. A textbook retrieval system is in place and implemented effectively. The work of the SMT is monitored regularly. Systems are in place to a) monitor educator and learner attendance, and b) address improper conduct and dress code of educators and learners
	2) Managing the quality of teaching and learning	Departmental policies with regard to assessment administration are followed. Marking and moderation of learner assessments are monitored regularly. Learner

Performance Standard	Criteria	The desired outcome
		assessment outcomes are analysed, intervention strategies developed and implemented
4. Developing and empowering self and others	1) Staff	Staff development initiatives are functioning. Regular classroom visits provide constructive feedback, guidance and support. Teacher appraisal systems comply with policy and the results are valid, reliable and fair.
	2) Self	Regular participation in activities aimed at enhancing personal and professional growth. Conduct is exemplary.
5. Managing the school as an organisation	1) Financial management	School's finances are managed by applying the necessary controls to optimise the use of the fund. Protocols are followed in developing the school budget, including approvals by the SGB and parent community. All prescription is SASA and departmental directives are adhered to.
	2) General institutional management and administration	The logbook contains a record of important events in the school. The school has effective and efficient systems in place to manage correspondence and other forms of communication, the systems are properly maintained and provide easy access for authorised persons. School provides accurate statistics to the district office.
	3) Management of infrastructure	The school has a safe and secure environment with clear access controls. Existing resources and physical infrastructure are used effectively. Use and safekeeping of all movable and immovable assets are monitored regularly. School buildings, ablution facilities and grounds are well maintained.

Performance Standard	Criteria	The desired outcome
6. Managing human resources (staff) in the school	1) Managing human resources (educators and support staff) in the school	Departmental HR policies are understood, explained to staff and implemented correctly. Delays in addressing staff queries, grievances, disciplinary issues are avoided.
7. Management and advocacy of extra-mural activities	1) Management and advocacy of extra-mural activities	Networks with relevant stakeholders and encourages the development of extra-mural or co-curricular activities.

4. Rating Scale, Descriptor, scores and percentages:

4.1 Post Level 4 Educators (Principals)

- A 4-point rating scale is used when completing the instrument.

RATING	DESCRIPTOR	SCORE RANGE	PERCENTAGE
1	Unacceptable: The level of performance does not meet minimum expectations and requires urgent intervention and support	0 - 141	0% - 49%
2	Acceptable: Satisfies minimum expectations. The level of performance is acceptable and is	142 - 198	50% - 69%

	in line with the minimum expectations, but development and support are still required		
3	Good: Performance meets expectations, but some areas are still in need of development and support	199 - 240	70% - 84%
4	Outstanding: Performance exceeds expectations. Although performance is outstanding, continuous self-development and improvement are advised.	241 - 284	85% - 100%
Maximum score: 284			

- Calculating the annual score of a PL 4 educator (Principal P 1A and P 1B)

NO.	PERFORMANCE STANDARD	MAXIMUM SCORE	Example of PRINCIPAL'S SCORE	PRINCIPAL'S SCORE as a percentage (P 1A)	PRINCIPAL'S SCORE as a percentage (P 1B)
		P 1A or P 1B			
1.	Leading the learning school (Weighting: P 1A – 40% P 1B – 20%)	60	(A) 38	(A) 25%	(A) 13%
2.	Shaping the direction and development of the school	52	36		
3.	Managing quality and securing accountability	44	23		
4.	Developing and empowering self and others	36	20		
5.	Managing the school as an organization	56	38		
6.	Managing human resources (staff) in the school	20	15		
7.	Managing and advocacy of extra-mural activities	16	10		
	Sub-Total (PS 2 – 7) (Weighting: P 1A – 60% P 1B – 80%)	224	(B) 142		
	TOTAL: ANNUAL SCORE (A + B)	284	180		
	Total Percentage (A + B)			63%	64%

Manual calculation of principal's score:

- Principal teaching 30% or more of scheduled teaching time (P 1A):

Performance Standard 1: Principal's score (PS 1) ÷ 60 x 40 = _____ %

Performance Standards 2 -7: Sub-total of Principal's score (PS 2 -7) ÷ 224 x 60 = _____ %

- Principal teaching less than 30% of scheduled teaching time (P 1B):

Performance Standard 1: Principal's score (PS 1) \div 60 x 20 = _____ %

Performance Standards 2 -7: Sub-total of Principal's score (PS 2 -7) \div 224 x 80 = _____ %

The documents that follow in the section below are:

- Annexure D 1:QMS Work plan (Post level 4)
- Annexure D 2:QMS Appraisal Instrument (Post level 4)
- Annexure D 3:Composite Score Sheet (Post Level 4)

QMS WORK-PLAN (PL 4: Principal): Year **Annexure D 1**

NAME		SCHOOL DESIGNATION		Principal	
PERIOD					
Performance Standard	KEY ACTIVITIES	TARGETS	TIME-FRAME	PERFORMANCE INDICATORS	CONTEXTUAL FACTORS
1. Leading the learning school					
2. Shaping the direction and development of the school					
3. Managing quality and securing accountability					
4. Developing and empowering self and others					
5. Managing the school as an organization					
6. Managing human resources (staff) in the school					
7. Management and advocacy of extra-mural activities					

AGREED (Signatures):

PAM Chapter K

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Appraisee (Principal)	Date	Appraiser (Circuit Manager)	Date	

DISTRICT STAMP

Annexure D 2

**QUALITY MANAGEMENT SYSTEM (QMS)
APPRAISAL INSTRUMENT
PRINCIPAL: POST LEVEL 4**

(To be completed twice during the school year – June and November)

Section A: EDUCATOR AND SCHOOL INFORMATION

1. APPRAISEE

Surname		First names	
Designation		Persal number	
Highest Qualification		Specialization in a subject domain	
Grade / Subjects taught during the current appraisal year			

2. APPRAISER

Surname		First names	
Designation		Persal number	

3. SCHOOL

Name of school		Province	
Circuit/district		Principal's name	
Telephone		Cell No	

4. EDUCATOR'S BRIEF JOB DESCRIPTION (Subjects/Grades/Key areas of responsibility, etc)

Teaching and assessment responsibilities	Extra-mural activities	Management and Administrative duties	Other: <i>(Please specify)</i>

5. AREAS OF APPRAISAL

Performance Standard	Max Score
	Principal (P 1A & P 1B)
1. Leading the learning school	60
2. Shaping the direction and development of the school	52
3. Managing quality and securing accountability	44
4. Developing and empowering self and others	36
5. Managing the school as an organization	56
6. Managing human resources (staff) in the school	20
7. Management and advocacy of extra-mural activities	16
TOTAL	284

SECTION B: APPRAISAL

Principal to be rated with a cross (X) for each descriptor

1. PERFORMANCE STANDARD 1 LEADING THE LEARNING SCHOOL

NB: Performance Standard 1 constitutes:

- 40% of the overall score for Principals (P 1A) who teach 30% or more of the scheduled teaching time, and
- 20% of the overall score for all Principals (P 1B) who teach less than 30% of the scheduled teaching time.
- Appraisal to be based on all descriptors.

Criterion 1: Classroom teaching		Mid-Year					Annual			
a.	Learning and teaching environment	1	2	3	4		1	2	3	4
b.	Classroom Management	1	2	3	4		1	2	3	4
c.	Knowledge of the subject	1	2	3	4		1	2	3	4
d.	Planning and presentation	1	2	3	4		1	2	3	4
e.	Management of work schedule	1	2	3	4		1	2	3	4
f.	Record keeping	1	2	3	4		1	2	3	4
g.	Feedback to learners	1	2	3	4		1	2	3	4
h.	Knowledge and application of forms of assessment	1	2	3	4		1	2	3	4
i.	Learner progress and achievement	1	2	3	4		1	2	3	4
Criterion 2 Support for the learning school										
a.	Enlists the support of parents and community members as partners in learning	1	2	3	4		1	2	3	4
b.	Communicates (provides feedback) with all stakeholders on the academic performance of the school	1	2	3	4		1	2	3	4
c.	Motivates learners to achieve academically	1	2	3	4		1	2	3	4
d.	Ensures that there are functional curriculum structures in the school.	1	2	3	4		1	2	3	4
e.	Promotes ICT learning	1	2	3	4		1	2	3	4
f.	Manages conflict in order to maintain a healthy teaching and learning environment	1	2	3	4		1	2	3	4
Total	Maximum Score					60				

Comments:

Mid-year	Annual

NB: Performance Standards 2 - 7 constitute:

- 60% of the overall score for Principals (P 1A) who teach 30% or more of the scheduled teaching time, and

- 80% of the overall score for all Principals (P 1B) who teach less than 30% of the scheduled teaching time.

2.	PERFORMANCE STANDARD 2	SHAPING THE DIRECTION AND DEVELOPMENT OF THE SCHOOL
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NB: Appraisal to be based on all descriptors.

Criterion 1: Planning		Mid-Year				Annual				
a.	The school has developed vision and mission statements which are relevant (to the school community) and achievable.	1	2	3	4		1	2	3	4
b.	Implementation of school improvement plan (SIP)	1	2	3	4		1	2	3	4
c.	Ensures that school has a safe and secure environment	1	2	3	4		1	2	3	4
d.	Implements transparent decision making structures – accepts responsibility for decisions taken	1	2	3	4		1	2	3	4
e.	Ensures that planning is based on data collected on a range of school activities	1	2	3	4		1	2	3	4
f.	Planning is done on time	1	2	3	4		1	2	3	4
g.	School analyses the results of various forms of assessment and sets clear targets for improvement	1	2	3	4		1	2	3	4
Criterion 2: School Governing Body and the broader school community										
a.	Ensures that the school has a functioning SGB	1	2	3	4		1	2	3	4
b.	Renders assistance to the SGB in terms of the areas listed in SASA 16A, excluding finances (<i>Refer to PS 5 for Finances</i>)	1	2	3	4		1	2	3	4
c.	Informs the SGB about policy and legislation	1	2	3	4		1	2	3	4
d.	The school has developed the various policies as required by SASA, which are aligned with the requirements of various legislation and departmental policies	1	2	3	4		1	2	3	4
e.	Networks with the community and builds partnerships to support the development of the school	1	2	3	4		1	2	3	4
f.	Liases with relevant government departments (e.g. Dept of Health) as required	1	2	3	4		1	2	3	4
Total	Maximum Score					52				

Comments:

Mid-year	Annual

3.	PERFORMANCE STANDARD 3	MANAGING QUALITY AND SECURING ACCOUNTABILITY
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NB: Appraisal to be based on all descriptors.

Criterion 1: Securing accountability		Mid-Year					Annual			
a.	Ensures safekeeping of all movable and immovable assets	1	2	3	4		1	2	3	4
b.	Ensures completion of all attendance registers and takes appropriate action where necessary (Staff and learners)	1	2	3	4		1	2	3	4
c.	Ensures that LTSMs are used effectively	1	2	3	4		1	2	3	4
d.	A textbook retrieval system is in place and is properly implemented	1	2	3	4		1	2	3	4
e.	Leads and monitors the work of the School Management Team	1	2	3	4		1	2	3	4
f.	Addresses unprofessional and improper conduct of educators and learners	1	2	3	4		1	2	3	4
Criterion 2: Managing the quality of teaching and learning										
a.	Follows departmental policies with regard to assessment administration (e.g. NSC, SBA)	1	2	3	4		1	2	3	4
b.	Monitors marking and moderation of learner assessments	1	2	3	4		1	2	3	4
c.	Ensures that efficient systems are in place for examinations/assessments	1	2	3	4		1	2	3	4
d.	Consolidates and analyses learners' assessment outcomes and develops appropriate intervention strategies	1	2	3	4		1	2	3	4
e.	Promotes (provides leadership) and monitors school learner intervention strategies	1	2	3	4		1	2	3	4
Total	Maximum Score					44				

Comments:

Mid-year	Annual

4.	PERFORMANCE STANDARD 4	DEVELOPING AND EMPOWERING SELF AND OTHERS
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NB: Appraisal to be based on all descriptors.

Criterion 1: Staff		Mid-Year					Annual			
a.	Staff training programmes planned and implemented	1	2	3	4		1	2	3	4

b.	Provides leadership and oversees mentoring, coaching and general support to staff	1	2	3	4		1	2	3	4
c.	Manages underperformance	1	2	3	4		1	2	3	4
d.	Promotes teacher appraisal practices in terms of applicable policy/ collective agreement	1	2	3	4		1	2	3	4
e.	Monitors staff appraisal and verifies evidence	1	2	3	4		1	2	3	4
f.	Conducts classroom observations to provide support and development of educators	1	2	3	4		1	2	3	4
g.	Ensures that departmental circulars and other relevant information are brought to the attention of the staff	1	2	3	4		1	2	3	4
Criterion 2: Self										
a.	Attends and participates in departmental, union and other professional activities aimed at enhancing his/her professional skills	1	2	3	4		1	2	3	4
b.	Professional conduct with reference to punctuality, presentable appearance, the respect shown to others	1	2	3	4		1	2	3	4
Total		Maximum Score				36				

Comments:

Mid-year	Annual

5. PERFORMANCE STANDARD 5 | MANAGING THE SCHOOL AS AN ORGANISATION

NB: Appraisal to be based on all descriptors.

ELEMENTS		Mid-Year				Annual				
Criterion 1: Financial Management										
a.	Manages school's finances in terms of applicable legislation (SASA) and policy	1	2	3	4		1	2	3	4
b.	Provides the necessary guidance to the SGB i.t.o finances	1	2	3	4		1	2	3	4
c.	Follows protocols in developing the school budget	1	2	3	4		1	2	3	4
d.	Takes all reasonable steps to prevent financial mismanagement and corruption	1	2	3	4		1	2	3	4
e.	Supports the school's fundraising efforts	1	2	3	4		1	2	3	4

Criterion 2: General institutional management and administration										
a.	Maintains a logbook containing a record of important events at the schools	1	2	3	4		1	2	3	4
b.	Ensures that systems are in place for the management of all correspondence	1	2	3	4		1	2	3	4
c.	Ensures that sensitive information on learners and teachers are properly maintained	1	2	3	4		1	2	3	4
d.	Maintains a filing and storage system	1	2	3	4		1	2	3	4
e.	Submits reports to the department/districts in terms of national and provincial policies	1	2	3	4		1	2	3	4
Criterion 3: Management of infrastructure										
a.	Uses existing resources and physical infrastructure optimally	1	2	3	4		1	2	3	4
b.	Monitors use and safekeeping of all movable and immovable assets in the school	1	2	3	4		1	2	3	4
c.	Makes regular physical infrastructure inspections	1	2	3	4		1	2	3	4
d.	School buildings, ablutions facilities and grounds are properly maintained	1	2	3	4		1	2	3	4
Total						Maximum Score	56			

Comments:

Mid-year	Annual

6.	PERFORMANCE STANDARD 6	MANAGING HUMAN RESOURCES (STAFF) IN THE SCHOOL
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NB: Appraisal to be based on all descriptors.

Criterion 1: Managing human resources (educators and support staff) in the school		Mid-Year				Annual				
a.	Makes every effort to fill vacant posts in terms of departmental policy	1	2	3	4		1	2	3	4
b.	Assists staff members with solving conditions of service problems	1	2	3	4		1	2	3	4
c.	Ensures that a positive labour environment exists at the school	1	2	3	4		1	2	3	4
d.	Deals with grievances of staff in terms of the relevant ELRC/PSCBC resolutions	1	2	3	4		1	2	3	4
e.	Ensures that prescribed procedures are followed with regard to any disciplinary action	1	2	3	4		1	2	3	4
Total		Maximum Score				20				

Comments :

Mid-year	Annual

7.	PERFORMANCE STANDARD 7	MANAGEMENT AND ADVOCACY OF EXTRA-MURAL ACTIVITIES
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NB: 4 out of 5 descriptors to be selected for appraisal

Criterion 1: Management and advocacy of extra-mural activities		Mid-Year					Annual			
a.	Ensures that the school offers extra-mural activities to its learners	1	2	3	4		1	2	3	4
b.	Encourages and supports learners to take part in extra-mural activities	1	2	3	4		1	2	3	4
c.	Ensures educator participation in extra-mural activities	1	2	3	4		1	2	3	4
d.	Oversees organisation of extra-mural activities	1	2	3	4		1	2	3	4
e.	Involves community with extra-mural activities, where applicable	1	2	3	4		1	2	3	4
Total		Maximum Score				16				

Comments:

Mid-year	Annual

1. Overall Remarks

1.1 Appraisee's (Principal) comments on the appraisal

Mid-Year	Annual

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1.2 Resource persons' comments on the appraisal (Optional)

Mid-Year	Annual

1.3 Appraiser's (Circuit Manager) comments

Mid-Year	Annual

2. Recommendations (Circuit Manager)

Mid-Year	Annual

3. SIGNATURES

	Mid-Year		
Name			
Designation	Appraisee (Principal)	Resource person	Appraiser (Circuit Manager)
Signature			
Date			

	Annual		
Name			
Designation	Appraisee (Principal)	Resource person	Appraiser (Circuit Manager)
Signature			
Date			

Signature			
Date			

CIRCUIT / DISTRICT STAMP

Annexure D 3

**QUALITY MANAGEMENT SYSTEM (QMS)
COMPOSITE SCORE SHEET: PL 4**

Principal

(To be submitted to the District Office by the end of the 4th quarter)

Educator		Date	
Persal Number		School	

NO.	PERFORMANCE STANDARD	MAXIMUM SCORE	PRINCIPAL'S SCORE	PRINCIPAL'S SCORE as a percentage (P 1A)	PRINCIPAL'S SCORE as a percentage (P 1B)
		<i>P 1A or P 1B</i>			
1.	Leading the learning school (Weighting: P 1A – 40% P 1B – 20%)	60	(A)	(A) %	(A) %
2.	Shaping the direction and development of the school	52			
3.	Managing quality and securing accountability	44			
4.	Developing and empowering self and others	36			
5.	Managing the school as an organisation	56			
6.	Managing human resources (staff) in the school	20			
7.	Management and advocacy of extra-mural activities	16			
	Sub-Total (PS 2 – 7) (Weighting: P 1A – 60% P 1B – 80%)	224	(B)	(B) %	(B) %
	TOTAL: ANNUAL SCORE (A + B)	284			
	Percentage (A + B) =			%	%

Comments:



I agree/do not agree with the overall performance rating.

SIGNATURES:

NAME	DESIGNATION	SIGNATURE	DATE
	Appraisee (Principal)		
	Resource person (if applicable)		
	Appraiser (Circuit Manager)		
VALIDATED BY:			
	District Director		

CIRCUIT / DISTRICT STAMP

SECTION F

Annexure E 1: Summative Scores for School

Annexure E 2: Lesson observation instrument

ANNEXURE E 1

**QUALITY MANAGEMENT SYSTEM FOR EDUCATORS
SUMMATIVE SCORES FOR SCHOOL**

School Name		EMIS Number	
Circuit		District	

Surname & initials												
Principal * (NB: * Principal's % to be recorded as per calculator.)	Post Level	Persal No.	PS 1 (60)	PS 2 (52)	PS 3 (44)	PS 4 (36)	PS 5 (56)	PS 6 (20)	PS 7 (16)	Total (284)	%	Identified development need
Deputy Principal	Post Level	Persal No.	PS 1 (60)	PS 2 (40)	PS 3 (44)	PS 4 (36)	PS 5 (40)	PS 6 (8)	PS 7 (8)	Total (236)	%	Identified development need
Departmental Heads	Post Level	Persal No.	PS 1 (28)	PS 2 (48)	PS 3 (28)	PS 4 (36)	PS 5 (12)	PS 6 (76)		Total (228)	%	Identified development need

Teachers	Post Level	Persal No.	PS 1 (28)	PS 2 (48)	PS 3 (28)	PS 4 (36)	PS 5 (12)			Total (152)	%	Identified development need

SIGNATURES:

NAME	DESIGNATION	SIGNATURE	DATE
	Principal		
	Circuit Manager		
VALIDATED BY:			
	District Director		

<i>School Stamp</i>	<i>Circuit / District Stamp</i>
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Annexure E 2

**LESSON OBSERVATION INSTRUMENT
(Post Levels 1 and 2)**

Educator's Name		Subject	
Date:		Topic	
Lesson observed by:			

1.	PERFORMANCE STANDARD 1	CREATION OF A POSITIVE LEARNING AND TEACHING ENVIRONMENT
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Criterion 1: Learning and teaching environment		Rating				Remarks
a	Seating arrangement promotes effective teaching and learning	1	2	3	4	
b	Classroom is tidy and clean	1	2	3	4	
c	Teaching and learning support material (e.g. charts) are displayed and used in the classroom.	1	2	3	4	
Criterion 2: Classroom Management						
a	Is punctual and organized in class	1	2	3	4	
b	Ensures that learners are punctual and settle down quickly	1	2	3	4	
c	Communication between educator and learners reflects the mutual respect, cooperation and understanding	1	2	3	4	
d	Manages discipline effectively	1	2	3	4	
Total						

2.	PERFORMANCE STANDARD 2	CURRICULUM KNOWLEDGE, LESSON PLANNING AND PRESENTATION
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Criterion 1: Knowledge of the subject		Rating				Remarks
a	Has adequate subject knowledge and uses it effectively	1	2	3	4	
b	Sets appropriate tasks for learners at the level of the Grade	1	2	3	4	
c	Uses a variety of examples, LTSM and other teaching resources to facilitate learning	1	2	3	4	
Criterion 2: Planning and presentation						
a	The lesson is logical, coherent and meaningful to learners	1	2	3	4	
b	The lesson is built on past knowledge and experience of learners	1	2	3	4	
c	Time is well-managed during lesson presentation	1	2	3	4	
d	Encourages interactive learning including class discussions, learner questions and demonstrations	1	2	3	4	
e	Responds appropriately to learner questions and inputs	1	2	3	4	
Criterion 3: Management of work schedule						
a	The pace of the work is in line with time frames stipulated in the work schedule	1	2	3	4	
b	Number of tasks and activities are in line with NCS/CAPS	1	2	3	4	
Criterion 4: Recordkeeping						
a	File/files neatly kept, organized and updated regularly	1	2	3	4	
b	Records of learner assessments are neatly kept, organized and updated regularly	1	2	3	4	
Total						

3.	PERFORMANCE STANDARD 3	LEARNER ASSESSMENT AND ACHIEVEMENT
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Criterion 1: Feedback to learners		Rating				Remarks
a	Assessment tasks are marked and returned to learners timeously	1	2	3	4	
b	Feedback is meaningful and regular	1	2	3	4	
c	Feedback is incorporated in future lesson planning	1	2	3	4	
Criterion 2: Knowledge and application of forms of assessment						
a	Uses different forms of assessment to test learner performance	1	2	3	4	

b	Intervention strategies accommodate learners with various learning abilities	1	2	3	4	
Criterion 3: Learner progress and achievement						
a	Learner results of various forms of the assessment show that they are attaining the set outcomes	1	2	3	4	
b	Remedial / Enrichment work supports learner progress	1	2	3	4	
Total						

Overall Remarks:

Supervisor	Educator	Resource person (Optional)
Signature:	Signature:	Signature:
Date:	Date:	Date:

Annexure E 3

**LESSON OBSERVATION INSTRUMENT
(Post levels 3 and 4)**

Educator's Name		Subject	
Grade:		Topic	
Date:			
Lesson observed by:			

Criterion 1: Classroom Teaching		Rating				Remarks
a.	Learning and teaching environment	1	2	3	4	
b.	Classroom Management	1	2	3	4	
c.	Knowledge of the subject	1	2	3	4	
d.	Planning and presentation	1	2	3	4	
e.	Management of work schedule	1	2	3	4	
f.	Record keeping	1	2	3	4	
g.	Feedback to learners	1	2	3	4	
h.	Knowledge and application of forms of assessment	1	2	3	4	
i.	Learner progress and achievement	1	2	3	4	
Total (Max Score: 36)						

Overall Remarks (Strengths/ Areas for development):

Supervisor	Educator (Deputy Principal / Principal)	Resource person (Optional)
Signature:	Signature:	Signature:
Date:	Date:	Date:

CHAPTER L: GENERAL PROVISIONS

L.1 EXEMPTION FROM PAYMENT FOR INSTRUCTIONS BY EDUCATIONAL INSTITUTIONS

An educator who, in his/her capacity as a student, must pay for instruction, or any other service resulting from such instruction, which he/she follows in accordance with one or other instructional programme approved by the department of education and which is offered by a department of education responsible for education or an educational institution instituted, registered or administered in terms of a law, may on a basis approved by the employer, be compensated partly or in full in a direct or indirect manner for such expenditure. (*Regulation 21 of the Regulations regarding the terms and conditions of employment of educators*)

L.2 FULL-TIME STUDY COURSE

L.2.1 A department of education may, on the terms and conditions he may determine, authorise and educator to follow a full-time study course approved by the department of education and while the educator follows such course he/she shall be deemed to be on duty in an educator's post. (*Regulation 29 of the Regulations regarding the terms and conditions of employment of educators*)

L.3 OFFICIAL CHANNELS OF COMMUNICATION

L.3.1 A request or communication from an educator in connection with a matter falling within the scope of the employer's power or duties must be directed to the employer via the head of the institution or the office.

L.3.2 Notwithstanding paragraph L.1.3.1, matters regarding the appointment, termination of service and leave privileges and enquiries about the remuneration of an educator must be referred to the head of education by the principal of the school concerned, subject to provisions of the LRA. (*Regulation 25 of the Regulations regarding the terms and conditions of employment of educators*)

L.4 REPLYING TO QUESTIONS

L.4.1 An educator must reply explicitly to a question concerning his/her duties and powers put to him by a person who is competent to put such question; provided that an educator shall not be obliged to furnish a reply which may incriminate him/her. (*Regulation 26 of the Regulations regarding the terms and conditions of employment of educators*)

L.5 LAWFUL INSTRUCTIONS

L.5.1 Subject to the provisions of paragraph L.1.5.2, an educator must carry out a lawful instruction given to him/her, in writing or verbally, by an authorized person.

L.5.2 An educator may, at the time of a verbal instruction, request that such an instruction be confirmed in writing and he/she may submit any complaint he/she may have in

connection herewith to the employer for a decision. *(Regulation 27 of the Regulations regarding the terms and conditions of employment of educators)*

L.6 RESIDENTIAL ADDRESSES AND TELEPHONE NUMBERS

L.6.1 An educator must notify the department of education of his/her residential address and telephone number, if any, and of any change thereof and the department of education must keep a record of it. *(Regulation 28 of the Regulations regarding the terms and conditions of employment of educators)*

L.7 PROOF OF MARRIAGE OR CHANGE OF MARITAL STATUS

L.7.1 An educator must, within 30 days after getting married or after his/her marital status has changed, submit a certified copy of the marriage certificate, decree or divorce or death certificate, as the case may be, to the department of education: provided that the department may in his/her discretion demand the submission of the original certificate. *(Regulation 30 of the Regulations regarding the terms and conditions of employment of educators)*

L.8 REPORTS ON EDUCATORS AND ADVERSE REMARKS

L.8.1 A report, on a form determined by the Minister (in the case of the Department of Basic Education) and the MEC (in the case of a provincial department of education), must be drawn up and submitted to the department of education by the head of the relevant institution or office in respect of any educator as often as the department of education may require.

L.8.2 Any adverse remark contained in a report referred to in paragraph L.1.8.1 must be brought to the notice of the educator concerned in writing and in its full context by the person who compiled the report.

L.8.3 The educator must sign the report and return it to the compiler together with such representations, in writing, as he/she may desire to submit.

L.8.4 The above provisions will also apply to adverse remarks made in respect of an educator in a written communication, except that such remarks must be brought to the educator's attention by the head of the relevant institution or office.

L.8.5 If it comes to the attention of the department of education that an adverse remark is unjustified, the department may at any time, if he/she deems fit, declare any adverse remark in connection with an educator null and void and in such a case the educator must be notified in writing of the nullification. *(Regulation 31 of the Regulations regarding the terms and conditions of employment of educators)*