

Additional educator
policy
(Excess)

EDUCATION LABOUR RELATIONS COUNCIL
Established in terms of the LRA of 1995 as amended



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EDUCATION LABOUR
RELATIONS COUNCIL

COLLECTIVE AGREEMENT NO. 4 OF 2016

23 August 2016

TRANSFER OF SERVING EDUCATORS IN TERMS OF OPERATIONAL REQUIREMENTS

Education Labour Relations Council
261 West Avenue
CENTURION
0046

 H. M.

EDUCATION LABOUR RELATIONS COUNCIL

COLLECTIVE AGREEMENT NO 4 OF 2016

TRANSFER OF SERVING EDUCATORS IN TERMS OF OPERATIONAL REQUIREMENTS

1. PURPOSE OF THIS AGREEMENT

The purpose of this agreement is to replace the provisions of Collective Agreement 2 of 2003 regarding the transfer of serving educators in terms of operational requirements.

2. SCOPE OF THIS AGREEMENT

This agreement applies to and binds:

2.1 The employer, and

2.2 All the educators of the employer as defined in the Employment of Educators Act, 1998 (as amended) whether such educators are members of trade union parties to this agreement or not.

3. THE PARTIES TO COUNCIL NOTE AS FOLLOWS:

3.1 Education Labour Relations Council Resolution No. 2 of 2003.

3.2 Regulations regarding the creation of educator posts in a provincial department of education and the distribution of such posts to the educational institutions of such a department (government notice No 1676 published in government gazette No 19627 dated 18 December 1998 as amended).

4. THE PARTIES TO COUNCIL THEREFORE AGREE AS FOLLOWS:

4.1 To request the Minister of Education to amend paragraph B.6 of Chapter B of the Personnel Administrative Measures by including the attached document (Annexure A).

5. DATE OF IMPLEMENTATION

This agreement shall, in respect of parties, come into effect on the date it is signed in Council.

6. DISPUTE RESOLUTION

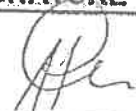
Any dispute arising from the application or interpretation of this collective agreement shall be referred to this Council for resolution in terms of its dispute resolution procedures.

7. DEFINITIONS



- 7.1 **"constitution"** means the constitution of the Education Labour Relations Council.
- 7.2 **"Council"** means the Education Labour Relations Council.
- 7.3 **"educator"** means an educator as defined in the Employment of Educators Act, 1998, as amended.
- 7.4 **"employer"** means the employer as defined in the Employment of Educators Act, 1998, as amended.
- 7.5 **"Labour Relations Act"** means the Labour Relations Act No. 66 of 1995, as amended.

THUS DONE AND SIGNED AT CENTURION THIS THE 23rd DAY
OF August 2016

ON BEHALF OF THE STATE AS THE EMPLOYER

DEPARTMENT	NAME	SIGNATURE
BASIC EDUCATION	H.M. Museu	

ON BEHALF OF THE EDUCATOR PARTIES

TRADE UNION	NAME	SIGNATURE
"SADTU"	Mugweya Maluleke	
CTU "ATU"		JC Kloppe

ANNEXURE A

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.




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- 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

