

THE *ROLE, DUTIES AND RESPONSABILITIES* OF **SAOU** WORKPLACE REPRESENTATIVES

Presented by: **SAOU Mpumalanga**
2023 Revised Version



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION



Pieter Fouché
PEC Chairperson



Cornelus Lemmer
PEC Deputy Chairperson

SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION



Liesl Rehbock



Sandra Lancaster



Francois Joubert



Lee-Ann Lowe



#WantOnsGeeOm

CONTACT DETAILS SAOU MPUMALANGA

Provincial Secretary:

Liesl Rehbock: Lieslr@saou.co.za

083 283-2486

Full time shop steward:

Ehlanzeni, Bohlabela, Gert Sibande

Sandra Lancaster: vvvmpu2@saou.co.za

083 283-2487

Professional officer:

Nkangala

Francois Joubert: vvvmpu1@saou.co.za

079 521-4341

Administrative officer

Lee-Ann Lowe: saoumpu@saou.co.za



SAOU

#WantOnsGeeOm

Workplace- representatives

BARGAINING STRUCTURES

The State is the overarching employer of educators employed in Provincial Education Departments. Nevertheless, in terms of legislation, the Heads of Education of the Provincial Education Departments are regarded as the employers of educators.

As employees of the State, collective negotiations (eg general salary adjustments) take place in the Public Service Co-ordinating Bargaining council, better known as PSCBC. In this Council, the trade union forms part of a trade union grouping, e.g. FEDUSA or COSATU. The SAOU is a member of FEDUSA.

Education-specific collective negotiations take place in the Labour Relations Council (ELRC). Negotiations culminate in collective agreements between the teaching unions and the employer. Collective agreements carry legal authority and bind all persons within the education sector.

BARGAINING STRUCTURES

At provincial level, the education unions negotiate organized with the Provincial Education Departments in the Provincial Chambers of the ELRC.

School governing bodies and private schools may in terms of legislation employ educators and are therefore the employers of educators who are appointed as such. These employees' labour rights are mainly regulated by the Labour Relations Act, Basic Employment Conditions Act and an individual employment contract.



WHY WORKPLACE REPRESENTATIVES?

The SAOU Workplace representative should :

1. Promote the image of the SAOU.
2. Ensure that the SAOU enjoy its rightful place in the functioning of the school.
3. Ensure that all communication reach every SAOU member. (Tip: Make sure you have email addresses and cellphone numbers of all members – WhatsApp groups)
4. Identify gaps in communication network. Forward suggestions to improve communication to the Provincial Secretary.
5. Draw attention to information which may have an affect on SAOU members.

RECRUITING

New members in the workplace (school or other educational institutions) for the SAOU recruit. In this regard, the following tips are given to you:

- Confirm new colleagues' SAOU membership with the SAOU school representative.
- Always have a few application forms handy. It is also available on the SAOU website www.saou.co.za under membership.
- Send completed application forms immediately to the SAOU office (remember to indicate that you were the recruiter).
- Let the SAOU office know when members resign, retire with a pension or transfer to another school or province.
- Let the SAOU office know when a SGB employee is appointed in a Departmental post or vice versa (New application form to be completed)
- Check on a regular basis whether the persons are still members.





"You have seven phone messages telling you to check your e-mail, and thirteen e-mails telling you to answer your phone."

RECRUITMENT POLICY

A SAOU School representative, who has handled a successful recruitment of a new member, qualifies for R200-00 recognition for each member recruited, if membership fees have already been collected from the relevant member for at least 3 months.

4 Students – Earn R200-00

An IT 3 form must be completed by each school representative who recruits a member, otherwise the R200-00 unfortunately cannot be paid to the recruiter



"It's not what you say, John, it's how you say it."

THE, ROLE , TASK AND RESPONSIBILITIES OF THE SAOU SCHOOL REPRESENTATIVES

SAOU

SAOUDIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATIONt: 012 436 0900 | 086 072 6843 f: 012 348 9658
e: saou@saou.co.za w: www.saou.co.za**BELANGRIKE INLIGTING : ONTVANGER VAN INKOMSTE / IMPORTANT INFORMATION : RECEIVER OF REVENUE**

Ten einde 'n IT3 aan u uit te reik, soos vereis deur die Ontvanger van Inkomste, word u vriendelik versoek om die volgende inligting te verskaf en so spoedig moontlik aan die SAOU terug te stuur. **Let wel : Hierdie is nie 'n aansoek om lidmaatskap nie.**

In order to issue an IT3, as requested by the Receiver of Revenue, you are kindly requested to complete the following by providing the necessary information and return this information as soon as possible to the SAOU. **Please note : This is not an application form for membership.**

Van Surname																				
Eerste twee name First two names																				
Voorletters Initials																				
Identiteitsnommer Identity Number																				
Persal																				
Epos adres / email address																				
Woonadres Residential Address																				
Poskode Postal Code																				
Posadres Postal Address																				
Poskode Postal Code																				
Werkadres Work Address																				
Poskode Postal Code																				
Telefoonnommer (huis) Telephone Number (home)																				
Telefoonnommer (werk) Telephone Number (work)																				
Faksnommer (werk) Fax Number (work)																				
Selfoonnommer Cell Phone Number																				
Bank																				
Naam van tak Name of branch																				
Takkode van Bank Branch Code of Bank																				
Bank Rekeningnommer Bank Account Number																				
Tipe rekening / Account type	Tjek Current		Spaar Savings		Transmissie Transmission		Verband Bond													
Inkomste Belastingnommer Tax Reference Number																				
Inkomste Belastingkantoor Income Tax Office																				

Stuur terug na / Return to : Faks/Fax 086 687 2476 of/ or e-pos/e-mail psibar@saou.co.za

SERVICE REQUEST FORM

SAOU

RECRUITING

WHO CAN YOU RECRUIT

- ✓ All Departmental EMPLOYEES
- ✓ All School Governing body employees
- ✓ Also look at neighbouring schools



SΔOU

PROBLEMS WITH MEMBERSHIP PAYMENTS

- ❖ Change of address/Correspondence
- ❖ Departemental appointments
- ❖ SGB Employees
- ❖ Cancellations
- ❖ Transfers



Why the SAOU?

- MSM/MCM Management & Classroom

- Focus groups



- Training (Provincial/National) – Professional services

- Legal services

- Service Centre

- Webpage: Newsletters

- Marketing and Communication

- Facebook page – CV/posts/Photos [#SAOUMpumalanga](#)

- FINSA

- Surveys

- Holiday resorts



YOUR TEACHING
CAREER



EDUCATION
VACANCIES & CV's



Professionele Bemagtiging |
Professional Empowerment



Regsdiensle |
Legal Services




Diensvoordele |
Service Benefits

SAOU



Dwarswegstrandoord

FINSA (EDMS) BEPERK
FINSA (PTY) LIMITED

 +27 12 436 0900

 info@finsa.co.za

 www.finsa.co.za

Serenestraat | Serene Street 278
Garsfontein
Pretoria
0042

Posbus | PO.Box 90120
Garsfontein
0042

REG. NR|NO: 1993/000573/07 NCRCP3044



Finansiële Dienste van Suid-Afrika (Edms) Beperk
Financial Services of South Africa (Pty) Limited

Serenestraat 278 Garsfontein Pretoria
Posbus 90120 Garsfontein 0042

**OPLOSSING VIR SKOLE
BEKOM BATES
SOLUTIONS FOR SCHOOLS
ACQUIRE ASSETS**

[HOME](#)[ABOUT](#)[APPLICATIONS](#)[RFQ](#)[CONTACT](#)[CLIENT LOGIN](#)

YOUR PARTNER IN FINANCE

At Finsa we enable individuals, schools and companies with financial freedom to be able to move forward

WHAT CAN WE OFFER YOU?

Financing solutions for your movable- and fixed assets.

PROPERTY FINANCE



We provide finance for your dream home, holiday home or investment property >>

VEHICLE FINANCE



We finance old and new vehicles, trailers, motorbikes and more >>

ASSET FINANCE



For business growth and a healthy cash flow, we will find a way to make financing happen for you >>

WHAT IS MY ESTIMATED INSTALMENT?

24/7 access to your profile where you can download a balance review, account statement and other documents.

REQUEST FOR QUOTATION

Complete the following form to receive a preliminary quotation delivered to your email address. If, after receiving the preliminary quotation, you would like to proceed with the application, follow the link received with the quotation, accept the quotation and complete the online application form.

For any question contact us on +27 12 436 0900 or send an email to info@finsa.co.za

RFQ

CONTACT INFORMATION

First Name:

Last name:

Marital Status

ID number:

Email:

Contact number:

Net monthly income:

Additional income:

CONTRACT INFORMATION

Applicant type:

Business name:

Application type:

Full description of item:

Make, model, year, serial number...

Repayment term:

Loan amount:

Deposit:

Supplier/Agent:

ID copy:

[Upload File](#)

Proof of residency:

[Upload File](#)

Other:

[Upload File](#)

Protection of personal information:

Finsa is subject to the POPI Act and undertakes to protect personal information and to only use such information for the purpose of the request for quotations and finance applications.

☐ I/We hereby give consent to Finsa to record, store and process the information provided in this form.

☐ I/we hereby give consent to Finsa to do a credit check on the applicant/s.

WHY FINSA?

- Simple online application process
(Complete the RFQ link on FINSA website)
- FINSA offers a Lease Agreement for schools to acquire assets
- For second-hand assets such as vehicles, Finsa offers a competitive interest rate, and SAOU members have the benefit of a 1% reduction on the total interest rate
- 24 hours a day access to your profile where your balance statements and redemption letters can be downloaded
- Finsa offers a Loan Agreement for real estate in exceptional cases where a mortgage is registered in favor of Finsa
- No student loans or personal loans are considered.

- Finsa is only a phone call away. Any enquiries please contact them:



Phone: +27 (0) 12-436-0900



Cell: +27 (0) 76-864-2639



E-mail: info@finsa.co.za



Web: www.finsa.co.za

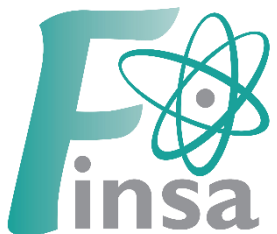
FINANSIERING VAN
VASTE EIENDOM*



VOERTUIG
FINANSIERING



FINANSIERING VAN
SELEKTIEWE
ROERENDE BATES



ROLE AND RESPONSIBILITIES OF THE REPRESENTATIVE

- Inform the SAOU about specific needs or general working conditions of members.
- Ensure at all times that there is a positive relationship between the SAOU members and the management of the school (includes principal as well as governing body).
- Investigate all grievances, complaints and suggestions for improvement and, if necessary, report to the Provincial Secretary (immediate reporting is essential).
- Encourage members to attend meetings and remain active union members.



SAOU

ROLE AND RESPONSIBILITIES (CONTINUE)

The logo for SAOU, with 'S' and 'U' in blue, and 'A' and 'O' in yellow. The 'A' is stylized as a triangle. The background features a dark blue geometric pattern of interconnected lines and dots.

SAOU

- ✓ Place information sheets on notice boards in the Staff Room and ensure that members are aware of this information. (includes National Newsflashes, Professional Newsletters, Blitz)
- ✓ Discuss new resolutions with members. Pass on ambiguities to Provincial Secretary.
- ✓ Keep abreast of new developments in relation to employment conditions and education in general.
- ✓ Ensure that the SAOU members also stand as candidates during governing body elections.



SAOU Mpumalanga

DIENSLEWERINGSVERSOEK / REQUEST FOR ASSISTANCE

Selfoon / Cellphone
e-pos / e-mail

Liesl Rehbock 083 283 2486 lieslr@saou.co.za
 Francois Joubert 079 521 4341 vvmmpu1@saou.co.za
 Sandra Lancaster 083 283 2487 vvmmpu2@saou.co.za



1. Naam/Name										
2. Persalnommer/Persal number										
3. ID nommer/ID Number										
4. Instansie/Institution of/or Skool/School										
5. Tipe aanstelling / Type of appointment	Beheerliggaam/ SGB	MDO Permanent/ MDE Permanent	MDO Tydelik / MDE Temporary	MDO Afios / MDE Substitution						
6. Posadres/Postal address (instansie /institution of/or skool/school)										
	Poskode/Postal code:									
7. Kontaknommers Contact numbers	Sel no / Cell no									
	E-pos / e-mail									
8. Navraag/Query										
	Skets kortliks u navraag. Verskaf sover moontlik alle tersaaklike besonderhede en dokumentasie, soos byvoorbeeld salarisstrokies, ens.									
	Provide brief exposition. Where possible, all particulars and supporting documents, e.g. salary slips, etc									

HEG ASB U LAASTE BETAALSTROKIE & RELEVANTE DOKUMENTE (BEWYS) AAN //
 PLEASE ATTACH YOUR LAST PAYS LIP & SUPPORTING DOCUMENTS (PROOF)



DIE VERANDERING IN ONDERWYS
 THE CHANGE IN EDUCATION

saou@saou.co.za

NASIONALE KANTOOR
 NATIONAL OFFICE

DIENSSENTRUM | SERVICE CENTRE



012 023 1333

PENSIOENBERAMING

- Slegs SAOU-lede se berekeninge sal gedoen word. Makelaars word versoek om gebruik te maak van die GPAA se webblad.
- Berekeninge kan slegs gedoen word tot een jaar vooruit.**
- Inligting moet asseblief volledig wees ten einde 'n berekening te kan doen.
- Stuur asseblief die vorm aan annamariam@saou.co.za

VERWAGING

Die SAOU pensioenberaming is slegs 'n inligtingsdiens wat aan die lid verskaf word. Die SAOU is nie 'n geregistreerde tussenganger of adviseur in terme van die FAIS-wetgewing nie. Hiermee word slegs 'n beraming van gelde betaalbaar by uitdienststreding aan u voorsien. Die beraming is nie gewaarborg of finansiële advies nie. Hierdie beraming moet ook nie gebruik word as basis of enigste basis vir die neem van belangrike besluite oor u persoonlike finansies nie. Hierdie beraming sal gebaseer wees op die SAOU se ervaring van GPAA-praktik en die inligting op hul webblad, maar dit bly 'n blote beraming. Die SAOU doen die beraming gebaseer op inligting wat deur u as lid verskaf is en die SAOU aanvaar dus geen aanspreeklikheid van welke aard ookal, vir finansiële of beplanningsbesluite geneem voortspruitend uit die beraming nie.

Die lid stel hiermee die SAOU as volkond (insluitend enige geassosieerde entiteite, enige verkase lid, voltydse of tydelike beampte, enige werknemer of onafhanklike kontrakteur wat dienste aan die SAOU verskaf) vry van enige eis of aanspreeklikheid – hetsy sivil, strafregtelik of voortspruitend uit enige ander regs basis voortvloeiend uit die verskaf van beraminge of beraminge hierbo.

Hiermee aanvaar ek die terme en voorwaardes soos hierbo uiteengesit:						JA	NEE	Parafeer
Titel:	Mnr	Mev	Me	Dr	Van:			
Naam:						Geboortedatum:		
PERSAL-nommer:								
Skool instansie:								
Posbenaming:								
Pensioen – begin datum soos op salarisstrokke:								
Datum van diensbeëindiging:								
Jaarlikse salariskerf:								
Het u pensioen teruggekoop?			JA	NEE	Indien JA, hoeveel jare het u teruggekoop?			
Dae verlofkrediet (salarisstrokke - opgehoopde verlof):								
Watter voordeel moet bereken word?								
<input type="checkbox"/> Bedanking/Aktuarieel			<input type="checkbox"/> Mediese Afrede					
<input type="checkbox"/> Afrede (60+jaar)			<input type="checkbox"/> Sterfte					
<input type="checkbox"/> Voortydige Afrede (voor 60 jaar)								
Kontaknommer:					E-posadres:			
Datum					Handtekening			

Heg asseblief die mees onlangse salarisstrokke aan.

NB: Die beraming kan nie gedoen word sonder u salarisstrokke nie.



T: 012 436 0900 | 086 072 6843 | 012 348 9658 | e: saou@saou.co.za | w: www.saou.co.za
 PO BOX/POSBUS 90120, GARSFONTEIN, PSA, 0042 | 278 SERENESTRAAT/SERENE STREET, GARSFONTEIN, PSA
 REG NO. 182/6/2/531

SERVICE REQUEST FORM AND PENSION CALCULATION FORM



APPLICATION FOR LIFE LONG MEMBERSHIP
AANSOEK OM LEWENSLANGE LIDMAATSKAP

(SLEGS VIR BESTAANDE, AFGETREDE SAOU-LEDE | ONLY AVAILABLE TO EXISTING, RETIRED SAOU MEMBERS)

Protection of personal information: The SAOU is subject to the POPI Act 4 of 2013 and undertakes to protect personal information and to only use such information for purposes associated with membership of the Union. This may include the provision or sending of information to members regarding matters of employment, professional development and services offered by the union. The applicant hereby consents to the SAOU recording, storing and processing the information provided in this application and hereby authorises the SAOU to make the necessary administrative arrangements to implement membership.

Beskerming van persoonlike inligting: Die SAOU is onderworpe aan die Wet op Beskerming van Persoonlike Inligting (POPI Act 4 of 2013) en onderneem om persoonlike inligting te beskerm en dit slegs aan te wend vir doeleindes van lidmaatskap van die Unie. Die applikant magtig hiermee die SAOU om die inligting wat in hierdie aansoek verskaf is, te rekodeer, stoor en te verwerk en magtig hiermee die SAOU om die noodsaaklike administratiewe reëlings te tref ten einde lidmaatskap te implementeer.

(Mark where applicable with an X / Merk waar van toepassing met 'n X)

Geen ledegeld word gehef nie. | No membership fees are charged.

Sedert watter jaar is u 'n lid? Since what year have you been a member?		From Van		To Tot	
Post description: Posbeskrywing	Principal Hoof	Deputy Principal Adjunkhoof	Departmental Head Departementshoof	Teacher Onderwyser	Tertiary Teacher Tersêre
				Admin	Therapist/ Psycholoog/ Terapië/ Sielkundige
					Office based Kantoor-gebaseerd
					General Assistant/ Grondsa man Algemene Assisient/ Terminwerker
School/Institution Skool/Instansie:					
Title/Title:	Prof	Dr	Mr Mnr	Mrs Mev	Miss Mej
Language preference: Taalvoorkeur:	Afrikaans			English	
Surname:Van:					
Full names:Volle name:					Initials: Voorletters:
ID number: ID nommer:					
PERSAL Number: PERSAL Nommer:					
Personal Email: Persoonlike E-pos:					
Cellphone number: Selfoonnommer:					
Province: Provinsie	Gauteng	KZN	Limpopo	Mpumalanga	North West Noordwes
					Free State Vrystaat
					Eastern Cape Oos-Kaap
					Western Cape Wes-Kaap
					Northern Cape Noord-Kaap

I confirm that I am aware that the SAOU is subject to the Protection of Personal Information Act (POPI Act 4 of 2013), that the union undertakes to protect personal information and only use it for purposes of membership of the Union and that this includes the provision or sending of information via Whatsapp (social media) and Newsletters to members regarding matters of employment, professional development and services offered by the Union.

Ek bevestig dat ek bewus is dat die SAOU onderworpe is aan die Wet op Beskerming van Persoonlike Inligting (POPI Act 4 of 2013), dat die unie onderneem om persoonlike inligting te beskerm en dit slegs aan te wend vir doeleindes van lidmaatskap van die Unie en dat dit die voorsiening of versending van inligting deur middel van WhatsApp (sosiale media) en Nuusbriefe aan lede betreffende diensvoorsorg, professionele ontwikkeling en dienste van die Unie insluit.

Signature | Handtekening

Date | Datum

SEND THE APPLICATION FORM TO:
STUUR DIE AANSOEKVORM AAN:

National/Nasionaal	086 687 2476 / saou@saou.co.za	Free State/Vrystaat	saounv@saou.co.za
Gauteng	086 683 7713 / saougau@saou.co.za	North West/Noordwes	saounw@saou.co.za
KwaZulu-Natal	086 743 5639 / saoukzn@saou.co.za	Eastern Cape/Oos-Kaap	086 687 8844 / saouek@saou.co.za
Limpopo	saoulm@saou.co.za	Northern Cape/Noord-Kaap	saounb@saou.co.za
Mpumalanga	saoumou@saou.co.za	Western Cape/Wes-Kaap	086 685 1389 / saouw@saou.co.za

Merk met / mark with X	
Salaries/Salary	
Pensioen/Pension	
Medies/Medical	
Bonus	
Regshulp/Legal advice	
Verlof/Leave	
Ander/Other	

Is die probleem/navraag reeds skriftelik aangemeld? Has the matter/request been reported in writing?	Merk met / mark with X		
	Ja/Yes	Nee/No	Datum/Date
	Skoolhoof/Principal		
	MDO/MDE		
Handtekening van lid / Signature of member:	Datum/Date:		

Ontvangserkenning

Hoof/Skoolvertegenwoordiger: Principal/ School representative:	Datum/Date:
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Ontvangserkenning

Provinsiale Sekretaris / Vakbondvertegenwoordiger: Provincial Secretary / Shop Steward:	Datum/Date:
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APPLICATION
FOR LIFE LONG
MEMBERSHIP



APPLICATION FOR MEMBERSHIP | AANSOEK OM LIDMAATSKAP

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(Mark where applicable with an X / Merk waar van toepassing met 'n X)

Title: Titel:	Prof	Dr	M/miss	Mrs/mev	Miss/mej				
Language preference: Taalvoorkeur:									
Surname: Van:									
Full names: Volle name:				Initials: Voorletters:					
ID number: ID nommer:									
SACE Number: SARO Nommer:				PERSAL Number: PERSAL Nommer:					
Personal Email: Persoonlike E-pos:									
Cellphone number: Selfoonnommer:									
Province: Provinsie:	Gauteng	KZN	Limpopo	Mpumalanga	North West Noordwes	Free State Vrystaat	Eastern Cape Oos-Kaap	Western Cape Wes-Kaap	Northern Cape Noord-Kaap
Employer: Werkgewer:	Department of Education Departement van Onderwys		School Governing Body/Council Skool Beheersingsraad	Independent School Onafhanklike Skool	TVET/DHET		Tertiary Institution Tersiere Inrigting		
Post description: Posbeskrywing:	Principal Hoof	Deputy Principal Adjunkhoof	Departmental Head Departementshoof	Teacher Onderwyser	Tertiary Tersier	Admin	Therapist/ Psychologist Terapeut/ Sielkundige	Office based Kantoor-gebaseerd	General Assistant/ Grondse man Algemene Assistent/ Terreinwerker
Phase: Fase:	0 - 4 ECD / YKO	Gr RR	Gr R	Gr 1-3	Gr 4-6	Gr 7-9	Gr 10-12	Gr 8-12	Tertiary Tersier
Institution/School: Instansie/Skool:							Pay point: Betaalpunt:		
Institution Email: Instansie E-pos:									
Institution Telephone: Instansie Telefoon:				Institution Fax: Instansie Faks:					

I confirm that I am aware that the SAOU is subject to the Protection of Personal Information Act (POPI Act 4 of 2013), that the union undertakes to protect personal information and only use it for purposes of membership of the Union and that this includes the provision or sending of information via Whatsapp (social media) and Newsletters to members regarding matters of employment, professional development and services offered by the Union.

Ek bevestig dat ek bewus is dat die SAOU onderworpe is aan die Wet op Beskerming van Persoonlike Inligting (POPI Act 4 of 2013), dat die unie onderneem om persoonlike inligting te beskerm en dit slegs aan te wend vir doeleindes van lidmaatskap van die Unie en dat dit die voorsiening of versending van inligting deur middel van WhatsApp (sosiale media) en Nieuwsbriewe aan lede betreffende diensvoorsorgsake, professionele ontwikkeling en dienste van die Unie insluit.

STATE EMPLOYEES ONLY

I, the undersigned, hereby authorise you to forthwith deduct my membership fees payable to the Union on a monthly basis, as determined from time to time, from my salary and to pay such fees to the Union. I understand that this authorisation is applicable for a minimum period of twelve months, including the month of implementation.

STAATSWERKNEMERS ALLEENLIK

Ek, die ondergetekende, magtig u hiermee om ledigeld betaalbaar aan die Unie, soos van tyd tot tyd bepaal word, op 'n maandelikse basis van my salaris af te trek en oor te betaal aan die Unie. Ek verstaan dat hierdie magtiging vir 'n minimum tydperk van twaalf maande geld, insluitende die maand van implementering.

Signature:
Handtekening:

Date:
Datum:

Please Note:
The cancellation of previous and current union membership is the responsibility of the member. Nesm.
kennis asb:
Kansellasie van u vorige en huidige vakbondbidmaatskap bly u eie verantwoordelijkheid.

OTHER (NON-DEPARTMENTAL)
ANDER (NIE-DEPARTEMENTEEL)

AUTHORISATION FOR DEBIT ORDER / MAGTIGING VAN DEBIETORDER

Banking details / Bankbesonderhede

Name of bank:
Banknaam:

Account number:
Rekeningnommer:

Type of account:
Tipe rekening

Cheque / Tjek

Transmission / Transmissie

Savings / Spaar

Debit order date:
Debiet order datum:

I, the undersigned, hereby authorise you to forthwith deduct my membership fees payable to the Union on a monthly basis from my bank account, as determined from time to time, and to pay such fees to the Union.

Ek, die ondergetekende, magtig u hiermee om ledigeld betaalbaar aan die Unie, soos van tyd tot tyd bepaal word, af te trek van my bankrekening en op 'n maandelikse basis oor te betaal aan die Unie.

Signature:
Handtekening:

Date:
Datum:

RECRUITER
WERWER

Name and Surname:
Naam en Van:

Institution:
Inrigting:

ID

SEND THE APPLICATION FORM TO:
STUUR DIE AANSOEKVORM AAN:

National/Nasionaal	086 687 2476 / saou@saou.co.za	Free State/Vrystaat	saouvr@saou.co.za
Gauteng	086 683 7713 / saougau@saou.co.za	North West/Noordwes	saounw@saou.co.za
KwaZulu Natal	086 743 5639 / saoukzn@saou.co.za	Eastern Cape/Oos-Kaap	086 687 8844 / saouek@saou.co.za
Limpopo	saoulm@saou.co.za	Northern Cape/Noord-Kaap	saounk@saou.co.za
Mpumalanga	saoumpu@saou.co.za	Western Cape/Wes-Kaap	086 685 1389 / saouw@saou.co.za

APPLICATION
FOR
MEMBERSHIP

APPLICATION STUDENT MEMBERSHIP
AANSOEK OM STUDENTE LIDMAATSKAP

Protection of personal information: The SAOU is subject to the POPI Act 4 of 2013 and undertakes to protect personal information and to only use such information for purposes associated with membership of the Union. This may include the provision or sending of information to members regarding matters of employment, professional development and services offered by the union. The applicant hereby consents to the SAOU recording, storing and processing the information provided in this application and hereby authorises the SAOU to make the necessary administrative arrangements to implement membership.

Beskerming van persoonlike inligting: Die SAOU is onderworpe aan die Wet op Beskerming van Persoonlike Inligting (POPI Act 4 of 2013) en onderneem om persoonlike inligting te beskerm en dit slegs aan te wend vir doeleindes van lidmaatskap van die Unie. Die applikant magtig hiermee die SAOU om die inligting wat in hierdie aansoek verskaf is, te rekordeer, stoor en te verwerk en magtig hiermee die SAOU om die noodsaaklike administratiewe reëlings te tref ten einde lidmaatskap te implementeer.

(Mark where applicable with an X / Merk waar van toepassing met 'n X)

Which year of study? Watter jaar van studie is u tans?	1	2	3	4+					
Language preference: Taalvoorkeur:									
Name of Tertiary institution: Naam van Tersiêre Instansie:			Jaar van voltooiing: Year of completion:						
Intern	Voltydse Student / Full Time Student		Deeltydse Student / Part Time Student						
Indien deeltids, datum van betingding van kontrak If part time, expiration date of contract									
In case of classroom assistant or intern, institution/school where you work: Indien klaskamerassistent of intern, instansie/skool waar u werk:									
Institution Email: Instansie E-pos:									
Institution Telephone: Instansie Telefoon:									
Title: Titel:	Prof	Dr	Mr/mr	Mrs/mv	Miss/mej	Ms/m			
Surname: Van:									
Full names: Volle name:			Initials: Voorletters:						
ID number: ID nommer:									
SARO nr. (indien van toepassing) SACE no. (if applicable)									
Personal Email: Persoonlike E-pos:									
Cellphone number: Selfoonnommer:									
Province: Provinsie:	Gauteng	KZN	Limpopo	Mpumalanga	North West Noordwes	Free State Vrystaat	Eastern Cape Oos-Kaap	Western Cape Wes-Kaap	Northern Cape Noord-Kaap

I confirm that I am aware that the SAOU is subject to the Protection of Personal Information Act (POPI Act 4 of 2013), that the union undertakes to protect personal information and only use it for purposes of membership of the Union and that this includes the provision or sending of information via Whatsapp (social media) and Newsletters to members regarding matters of employment, professional development and services offered by the Union.

Ek bevestig dat ek bewus is dat die SAOU onderworpe is aan die Wet op Beskerming van Persoonlike Inligting (POPI Act 4 of 2013), dat die unie onderneem om persoonlike inligting te beskerm en dit slegs aan te wend vir doeleindes van lidmaatskap van die Unie en dat dit die voorsiening of versending van inligting deur middel van Whatsapp (sosiale media) en Nuusbriewe aan lede betreffende diensvoorraed, professionele ontwikkeling en dienste van die Unie insluit.

STATE EMPLOYEES ONLY

I, the undersigned, hereby authorise you to forthwith deduct my membership fees payable to the Union on a monthly basis, as determined from time to time, from my salary and to pay such fees to the Union. I understand that this authorisation is applicable for a minimum period of twelve months, including the month of implementation.

STAATSWERKNEMERS ALLEENLIK

Ek, die ondergetekende, magtig u hiermee om ledegeld betaalbaar aan die Unie, soos van tyd tot tyd bepaal word, op 'n maandelikse basis van my salaris af te trek en oor te betaal aan die Unie. Ek verstaan dat hierdie magtiging vir 'n minimum tydperk van twaalf maande geld, insluitende die maand van implementering.

Signature:
Handtekening:Date:
Datum:

Please Note:

The cancellation of previous and current union membership is the responsibility of the member. Neem kennis asb.

Kansellering van u vorige en huidige vakbondlidmaatskap bly u eie verantwoordelikheid.

OTHER (NON-DEPARTMENTAL)

ANDER (NIE-DEPARTEMENTEEL)

AUTHORISATION FOR DEBIT ORDER / MAGTIGING VAN DEBIETORDER

Banking details / Bankbesonderhede

Name of bank:

Banknaam

Account number:

Rekeningnummer:

Type of account:

Tipe rekening:

Cheque / Tjek

Transmission / Transmissie

Savings / Spaar

Debit order date:

Debiet order datum:

I, the undersigned, hereby authorise you to forthwith deduct my membership fees payable to the Union on a monthly basis from my bank account, as determined from time to time, and to pay such fees to the Union.

Ek, die ondergetekende, magtig u hiermee om ledegeld betaalbaar aan die Unie, soos van tyd tot tyd bepaal word, af te trek van my bankrekening en op 'n maandelikse basis oor te betaal aan die Unie.

Signature:
Handtekening:Date:
Datum:

RECRUITER

WERWER

Name and Surname:

Naam en Van:

Institution:

Inrigting:

ID

SEND THE APPLICATION FORM TO:

STUUR DIE AANSOEKVORM AAN:

National/Nasionaal	086 687 2476 / saou@saou.co.za	Free State/Vrystaat	saoufry@saou.co.za
Gauteng	086 683 7713 / saougau@saou.co.za	North West/Noordwes	saoufry@saou.co.za
KwaZulu-Natal	086 743 5639 / saoukzn@saou.co.za	Eastern Cape/Oos-Kaap	086 687 8844 / saouk@saou.co.za
Limpopo	saoulm@saou.co.za	Northern Cape/Noord-Kaap	saouk@saou.co.za
Mpumalanga	saoumpu@saou.co.za	Western Cape/Wes-Kaap	086 685 1389 / saouwk@saou.co.za

APPLICATION
FOR STUDENT
MEMBERSHIP



SAOU – School Visits

Please complete this form for SAOU (Gauteng) to bring our database up to date:

Name of school:

Pay point no:

District:

Date of Visit:

Type of school (mark applicable information with a tick)

	Departmental Office	DHET/TVET	Combined School	
ECD	Pre-primary school	High/Secondary School	High/Secondary School with technical stream	
Primary School	Technical School	Agricultural School	Art School	
Hospital /Clinic School	University	LSEN Special School	LSEN Extraordinary School	
Private School	Other : Specify			

Do you have a hostel? YES ☐ NO ☐

Category (mark applicable with a tick)

Afr. Single medium	
Eng. Single medium	
Double medium	
Parallel medium	
Other: Specify	

Principal:

Postal address:

Street address:

Tel no:

Fax no:

Email:

Work Place Representative:

Cell no of WPR:

Email of WPR:

(Preferably not the same as that of the school – as certain emails are sent only to the Work Place Representatives.)



SKOOLBESOEKE

Voltooi asb vir SAOU (Gauteng) hierdie vorm om ons rekenaarbasis op datum te bring:

Naam van skool:

Betaalpunt no:

Distrik:

Datum van besoek:

Tipe skool (merk toepaslike met kruisie)

ABET	Departementele kantoor	DHET/TVET	Gekombineerde skool
VKO	Pre-primêre skool	Hoër/Sekondêre skool	Hoër/Sekondêre skool met tegniese baan
Laer/Primêre skool	Tegniese skool	Landbou skool	Kunsskool
Hospitaal / Kliniekskool	Universiteit	LSEN Spesiale skool	LSEN Buitengewone skool
Privaat	Ander : Spesifiseer		

Het u 'n koshuis? JA ☐ NEE ☐

Kategorie (merk toepaslike met kruisie)

Afr Enkelmedium	
Eng Enkelmedium	
Dubbelmedium	
Parallel medium	
Ander : Spesifiseer	

Hoof:

Posadres:

Straatadres:

Tel no:

Faks no:

Epos adres:

Werkplekverteenwoordiger:

Sel no WPV:

Epos van WPV:

(Verkeedik nie dieselfde as die skool nie – daar word deur die jaar eposse net aan die WPV gestuur)

SCHOOL VISITS



36/2021

27/08/2021

BEHUISINGSTOELAAG

HOUSING ALLOWANCE

Na aanleiding van die kollektiewe ooreenkoms van die Staatsdiens Koördinerings Bedingsraad (SKBR/"PSCBC"), Resolusie 1 van 2018, en die jongste aanpassings van die toelaag, is dit belangrik dat lede van die volgende kennis moet neem:

- Diskriminasie op grond van huwelikstatus word afgeskaf, dws dat beide eggenote vir die behuisingstoelaag kwalifiseer.
- Die behuisingstoelaag is met ingang van 1 Julie 2021 tot R1,500.07 pm aangepas. Die aanpassing vind jaarliks volgens die VPI van die voorafgaande 12 maande plaas.

Dit is belangrik dat aansoeke vir die behuisingstoelaag (huiseienaars en huurders) volledig voltooi word.

Die SAOU moedig lede dus aan om die kontrolelys te gebruik om te verseker dat al die nodige dokumentasie ingehandig word. [Klik hier om die kontrolelys af te laai.](#)

Lede word ook aangeraai om die dag en datum waarop die aansoek na die werkgever (provinsiale departement van onderwys) gestuur is, te rekordeer. Die datum waarop die departement die VOLLEDIGE aansoek ontvang het, moet as basis dien vir die bepaling van die datum vir implementering.

Lede moet ook onthou dat hulle persoonlik verantwoordelik is om die werkgever in kennis te stel van enige verandering ten opsigte van huiseienaarskap/verandering in huurooreenkoms en/of enige verandering van persoonlike inligting, veral rakende woonadresse.

Vir maklike verwysing word die volgende kontakbesonderhede aan u verskaf:

- www.gehs.gov.za
- Employee Enrolment Support Call Centre: 0861 12 34 34
- E-pos adres gehs@dpsa.gov.za.

Emanating from the collective agreement of the Public Service Co-ordinating Bargaining Council (PSCBC) Resolution 1 of 2018, and the latest adjustments to the allowance, it is important to note the following:

- Discrimination on marital status has been abolished, i.e. that both spouses qualify for the housing allowance.
- The current housing allowance has been adjusted with effect from 1 July 2021 to R1,500.07 pm. It will be adjusted annually according to the CPI of the preceding 12 months.

It is important to ensure that all applications for the housing allowance (home owners and tenants) are fully completed.

The SAOU encourages members to use the checklist to ensure that all the necessary and relevant documentation is handed in. [Click here to download the checklist](#)

Members are also advised to record the day and date on which the application was submitted to the employer (provincial department of education). The date on which the department received the FULLY COMPLETED application, must serve as the basis for determining the date of implementation.

Members must also note that it is their personal responsibility to inform the employer of any change concerning home ownership/change in rental agreement and/or any change in personal particulars especially regarding home addresses.

For easy reference the following contact details are provided:

- www.gehs.gov.za
- Employee Enrolment Support Call Centre: 0861 12 34 34
- E-mail address: gehs@dpsa.gov.za

EIENAARS

- Alle huiseienaars wat die behuisingstoelaag wil ontvang, MOET by die GEHS (Government Employees Housing Scheme) geregistreer wees (www.gehs.gov.za) en die [GEHS Housing Application form for home owners](#) volledig voltooi.
- Dit is **bale belangrik** om kennis te neem dat 'n uitdruk van u GEHS-registrasie aan alle dokumentasie geheg moet word.

HOME OWNERS

- All home owners who wish to receive the home owners allowance MUST be registered at the GEHS (Government Employees Housing Scheme) (www.gehs.gov.za) and complete the [GEHS Housing Application form for home owners](#) in full.
- It is **very important** to note that a printout of the GEHS registration confirmation must be attached to all documentation.

HUURDERS

- Alle huurders wat die behuisingstoelaag wil ontvang, MOET by die Government Employees Housing Scheme (GEHS) geregistreer wees en die [GEHS Housing Application form for tenants](#) volledig voltooi.
- **Aanstellingsdatum:**
 - **Aanstellings pre-27 Mei 2015:** Werknemers wat nie huiseienaars is nie en op 'n toelaag geregtig is, sal steeds R900 pm ontvang, maar die verskil, R600.07 pm, sal in die persoon se individuele spaarrekening by die werkgever inbetaal word.
 - **Aanstellings post-27 Mei 2015:** Werknemers wat nie huiseienaars is nie en op 'n toelaag geregtig is, se volle R1,500.07 pm sal in die persoon se individuele spaarrekening by die werkgever inbetaal word.
- Dit is **bale belangrik** om kennis te neem dat 'n uitdruk van u GEHS-registrasie aan alle dokumentasie geheg moet word.
- Alle huurders moet die [Nomination of Beneficiaries form](#) voltooi. (Indien 'n opvoeder wat huur in diens sou sterf moet die spaargeld aan die begunstigdes uitbetaal word).
- Die spaargeld wat in die ILSF (*Individually Linked Savings Facility*) namens die huurder gespaar sal SLEGS in die volgende gevalle uitbetaal word:
 - Aftrede of Mediese Aftrede
 - Sterfte
 - Einde van Kontrak (vir Kontrak Werknemers)
 - Huiseienaarskap
 - Spaarfonds benodig as deposito vir die aankoop van 'n huis.
- [Klik hier](#) om die aansoekvorm af te laai.

TENANTS

- All tenants who wish to receive the housing allowance MUST be registered with the Government Employees Housing Scheme (GEHS) and complete the [GEHS Housing Application form for tenants](#) in full.
- **Date of appointment:**
 - **Appointments pre 27 May 2015:** Eligible employees who do not own a house will continue to receive R900 pm, but the difference, R600.07 pm, will be diverted to the person's Individual Linked Savings Facility with the employer.
 - **Appointments post 27 May 2015:** Eligible employees who do not own a house will receive the full allowance of R1,500.07 pm, but it will be diverted to the person's Individual Linked Savings Facility with the employer.
- It is **very important** to note that a printout of the GEHS registration confirmation must be attached to all documentation.
- All tenants must complete the [Nomination of Beneficiaries form](#). (Should an educator who is a tenant, die in-service, the savings must be paid out to the beneficiaries).
- The savings that are accumulated in the ILSF (*Individually Linked Savings Facility*) for the tenant will ONLY be paid out in the following instances:
 - Retirement or Medically Boarded
 - Death
 - End of Contract (for Contract Employees)
 - Acquired Home ownership
 - Savings required as deposit towards purchasing a home.
- [Click here](#) to download the application form.

NEWSLETTER ON HOUSING

SHORTLISTING AND INTERVIEWS

PAM – **Collective Agreement** - determines that no short listing or interviews may be conducted without an invitation to each of the recognised education trade unions.

At present only SADTU and CTU-ATU



The screening process

Responsibility : Dept of Education

1. Screen all applications
2. Eliminate all applicants that don't qualify
3. All qualifying candidates' applications should be sent to the relevant governing body.



Compilation of the of the short list and interview panel

- One departmental official (may be the local principal) as observer and master of educational policy.
- The principal if he/she doesn't act as dept official and not a candidate.
- 4 members of the governing body, include one teacher member.
- One trade union representative of each of the acknowledged trade unions in ELRC
- May also be all the members of SGB short list



The short-listing process

Guidelines:

- ❖ Criteria should be fair , non-discriminatory
- ❖ According to the profile of the relevant post
- ❖ The curricular requirements of the school
- ❖ List for the interview should not exceed five per post
- ❖ SGB must inform all relevant parties (unions and candidates) in writing of dates of the short-list meeting and the interview at least 5 working days in advance.
- ❖ Compile the criteria- profile of the post
- ❖ Points awarded to all candidates. Placed in order of preference



Interviews

1. Candidates should be informed about date, time and place at least 5 working days in advance.
2. One member of each recognised trade union as well as one departmental representative may attend the interviews as observer. Also inform them in writing 5 working days in advance. Proof of notices must be provided.
3. Questions should be the same to all candidates.
4. Devise a fair system for the allocation of marks.
5. The interview panel should place 5 candidates in order of preference.
Observers attend this process.
6. Interview panel presents the order of preference to the full governing body.
7. Members who has personal interest should excuse him/herself.



The role of the observer

TO ENSURE THAT:

- That the entire process is fair and transparent.
- That all candidates are evaluated to the same criteria
- Observers attend all stages of the process and are never excluded by the SGB.
- Observers do NOT actively take part in the process, but simply observe. Observers may give their opinions on the procedures, but DON'T take part in decision making or selection.
- Preferably not act as observer at your own school.
- All information is confidential.



Irregularities to be on the lookout for

Possible irregularities:

- Leading questions to enhance / harm a candidate.
- Obvious favouring of a certain candidate.
- Interference or active participation of observers.
- Unfair discrimination against a certain candidate on ground of gender, age, pregnancy, race, etc.
- Loaded questions regarded a candidate's personal life - to harm the candidate.
- A lack of objectivity in the interview panel.
- Unorthodox methods of interviewing eg. group interviews
- The exclusion of union representatives at any stage!!
- If stakeholders were not informed in time and in writing.

Managing objections

In the event of any irregularity, the following procedure should be adhered to:

1. Should be indicated to the chairperson and be noted in the minutes.
2. Inform the meeting the issue will be taken up with the trade union.
3. Request a copy of the minutes.
4. If the candidate is a member of the SAOU, it should be discussed with him or her.
5. Contact SAOU to follow up.
6. Compile a report and/or e-mail to the union



Who does the SAOU use as observers?

- At present within the ELRC in alliance with other trade unions **CTU-ATU**
- Send all correspondence to alliance members
- Notifications of short-listing and interview meetings are sent to the **relevant circuit organizer**.
- The circuit organizer arranges for an **observer from a school as close as possible to the relevant school** on behalf of the SAOU.
- Preferably not a staff member of the relevant school-exceptions may be made.
- The observer should be on the **same or a higher post level**.
- Where possible the same observer should attend shortlisting as well as interviews.

The logo for the School Admissions Oversight Unit (SAOU). It features the letters 'S', 'A', 'O', and 'U' in a stylized font. The 'S' and 'O' are blue, while the 'A' and 'U' are yellow. The letters are set against a background of thin, light blue lines that form a series of overlapping triangles, creating a geometric pattern.

Leave : Teachers and Public Service (PS) Personnel



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

CONTENT

- **Family Responsibility & Urgent Private Matters**
- **Sick leave**
- **PILIR leave**
- **Maternity Leave**
- **Pre-Natal Leave**
- **Paternity and Adoption Leave**
- **Surrogate Leave**
- **Special Leave**
- **Leave PS Personnel**

The logo for SAOU, featuring the letters 'S', 'A', 'O', and 'U' in a bold, sans-serif font. The 'S' and 'U' are blue, while the 'A' and 'O' are yellow. The 'A' is stylized with a triangular cutout in the center.

DIE VERANDERING IN ONDERWYS THE CHANGE IN EDUCATION

LEAVE : Teachers

PAM – Chapter H & Employment of Educators Act



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Family Responsibility & Urgent Private Matters

- Maximum of 14 workdays per year – Can't be transferred to the next year.

NB:- Principal to recommend or decline the leave. Dept to approve.

- Sick Child/Spouse/Birth of a child – 5 days Medical certificate from Doctor with a start and end date is required.

Child/Spouse or closest family dies – 5 days Proof of Funeral or of affidavit if surnames differ.

- 5 days for a child with special needs



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Family Responsibility & Urgent Private Matters



- Leave for private matters:- Need prove if Principal or district requires it, especially if it is more than one day

Example:-Burglary, emergency visit to the dentist, SARS-visit, etc.



Family responsibility and urgent private matters leave can not exceed 14 days

- If no family responsibility leave is taken the 14 days can be used as Urgent Private matters.

NB – The above is with the approval of the Principal and should where possible be arranged in advance.

SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

SICK LEAVE

- 36 days per 3 year cycle

- Current Cycle : **2022-2024**
- Day 1 en 2: No Medical Certificate required
- Day 3: medical certificate submitted with application
- 3rd time ill in a 8 week cycle- A medical certificate is required even for one day (8 week rule).

This is workdays not calendar days



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Short Term and Long Term PILIR Leave

NB- Can only apply once 36 days normal sick leave has been used:

- Apply within 5 days
- Strong motivation /Proof from specialists
- Department discretion
- Short Term Pilir - 29 Days and shorter
- Long-term Incapacity - 30 days and longer

If your 36 days are exhausted within your current cycle, members must complete a Pilir form for every day/period of sick leave

In case of an application for permanent medical disability a member need to use the Pilir forms

Department can appoint a replacement in cases where the leave period will be 20 working days or longer.



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Maternity Leave

- 4 months continuous paid leave provided the member is 12 months in his or her post
- Contract positions – 10 days a month paid leave for each month of the contract (First year of employment)
- Should start maternity leave 14 days before childbirth
- If baby is born early, maternity leave begins from day of birth.
- Miscarriage, Stillbirth – 6 weeks paid leave (From third trimester)
- Normal duties may not be resumed until 6 weeks after birth
- May take 184 days of unpaid leave – (negative implications.....!)



TRANSFORMING IN ORDERWYS
THE CHANGE IN EDUCATION

Pre-Natal Leave

8 working days before childbirth – not transferred to maternity leave.

This is for visits to the gynecologist, etc.

Needs evidence

The period may be taken in half days

7 hours = 1 day of leave



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Paternity and Adoption Leave

Spouse/registered partner

3 consecutive working days – paid dad leave

Need evidence

May also take 5 days Family Responsibility Leave
for the Birth of a Child

Adoption leave

45 days leave (Both parents share days jointly)

Only if you adopt a child (under 2 years old)



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DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Surrogate Leave

Receiving couple

4 continuous calendar months for the surrogate baby's parents – only one parent may take it

Take effect on day of childbirth

Surrogate Mother

6 weeks of leave after childbirth

Take effect 14 days before childbirth



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Special Leave

Professional, Personal and Religious Development

Only 3 days a year for, among others:-

Professional Development (In the interest of employer)

OR

Personal development in the interests of the employer

OR

- Religious practice

Must apply before taking the leave.

Evidence/motivation needs to be attached.



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Special Leave (Continued)

Quarantine

MUST be accompanied with medical doctor's note stating reason and period be stipulated.

Study leave

Period is determined by individual's timetable and situation
May be half paid/full paid/unpaid leave.

Exam leave

Period is determined by individual's timetable and situation
One day of study for each exam day. "A Day for a Day"



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Special Leave (Continued)

Leave for injuries on duty or illnesses (Occupational Related)

MUST be accompanied with medical doctor's note stating reason and period be stipulated.

Injury on Duty (IOD) MUST be reported and forms should be completed within 7 days

Unpaid leave

Maximum of 184 continuous days (including weekends, holiday days)

Unpaid leave for Continuity of Service

Maximum 120 continuous days



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Approved Leave

All leave, except sick leave, should be discussed with the Principal in advance where required, and getting permission from the Department before leave is taken.



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Leave : PS Employees

Circular 44/2008 – CS leave institutions

*Determination and Directive on leave
of Absence - August 2021*



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Vacation Leave

Persons with less than 10 years service:-

27 Days a Year

22 Days MUST be taken during school holidays

5 days MUST be taken during school time.

Persons 10 years and more service:-

30 Days a Year

22 Days MUST be taken during school holidays

8 days MUST be taken during school time.

(EDUCATORS DON'T GET VACATION LEAVE)



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Sick Leave and PILIR

Works exactly the same as for educators

Pilir leave – No paid substitute.

FAMILY RESPONSIBILITY LEAVE

Works exactly the same as for educators

**NO URGENT PRIVATE BUSINESS LEAVE FOR
PS STAFF T – USE THE 5/8 DAYS AVAILABLE TO YOU**



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

Maternity Leave, Adoption Leave and Surrogate leave

Works exactly the same as for educators
No paid substitute



DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

TIME-OFF (...during School Holidays)

Refer here to the "Determination and Directive on Leave August 2021" – Refer to No. 6.1 – 6.5

IN SHORT:-

The Principal must exercise discretion if there is no work, Admin do have TIME-OFF/vacation. A timetable must be set in the beginning of the year in terms of leave and time-off.

"It is important to make sure that non-teaching staff is retained on duty during institution holidays, only For VALID OFFICIAL DUTY" – Section 6.5.4.7.



SAOU

DIE VERANDERING IN ONDERWYS
THE CHANGE IN EDUCATION

EDU FORMS

EDU 1 – Application for an educator's post

1. Maak seker al die inligting word voltooi en korrekte(gesertifiseerde) dokumente word aangeheg
2. Sace is baie belangrik

EDU 2 – Request for mandate to appoint an educator on temporary closed contract

1. Is vervang met EDU 1, word nie meer so baie gebruik nie

EDU 3 – Application for extension of temporary closed appointment as educator

1. Is vervang met EDU 1, word nie meer so baie gebruik nie

EDA 3 – Annexure A – Acting appointment: Educators

1. Word elke jaar ingevul as pos nog nie gevul is nie.
2. Slegs geldig vir een jaar bv. Maart 2021 - Maart 2022

EDU-vorms (EDU-forms)

EDU 4 – Notice of assumption/resumption of duty

1. Maak seker dat Section D (Bonus) geselekteer (x) is.
2. Section E – Section B word herhaal (Persal ens)
3. Section E – Section D word herhaal (Verjaarsdag maand)
4. NBII Onderwyser (werknemer) moet by Section F en onder op die bladsy by Educator teken

EDU 5 – Notice of suspension of salary

1. Word gebruik met termination of service

EDU 6 – Notice of relinquishing of post

1. A3 – Onthou "Retire due to age" is 65 jaar oud.
2. A3 – "Early retirement" is **jonger** as 65 jaar oud

EDU 7 – Previous temporary closed employment contract has expired, at an ALTERNATIVE institution

1. Word gebruik wanneer 'n tydelike onderwyser in sy provinsie oorgeplaas word.

EDU 8 – Previous temporary closed employment contract has expired, at the SAME institution

1. Word November/ Desember ingestuur vir volgende jaar, moet elke jaar ingestuur word totdat onderwyser permanent gemaak is

EDU 9 – Notice of relocation to alternative institution within the department

1. Slegs permanent aangestelde onderwysers
2. Skool waarheen onderwyser hervestig moet proses begin

EDU 10 – Application for approval for re-appointment after voluntarily termination of service

1. Moet goedkeuring vanaf HOD kry

EDU 1 – Application for an educator's post

- Make sure all the fields are completed and correct (certified) documents are attached
- SACE is very important.



education
MPUMALANGA PROVINCE
REPUBLIC OF SOUTH AFRICA

APPLICATION FOR PERMANENT EDUCATOR POST

Mark with an X where applicable:

☐

Application for an advertised post

☐

Application for first temporary closed employment in the MDE

☐

Application for closed pro rata employment in the AET sector

☐

Application for substitute closed employment

☐

Application for transfer from another provincial department

Institution/Office: Circuit:

NOTES:

- (a) In the case of an application for an advertised post, FORM EDU 4: Notice of Assumption of Duty should only be submitted after the applicant had received a formal offer of appointment from the Department and had subsequently assumed duty in the advertised post.
- (b) In the case of an application for transfer from another provincial department, FORM EDU 1 should be accompanied by the conditional approval of transfer from the Head of that provincial department or his/her delegate. FORM EDU 4: Notice of Assumption of Duty should only be submitted after the applicant had received formal and final approval of the transfer from the Head of the Mpumalanga Department of Education or his/her delegate and had subsequently assumed duty.
- (c) If EDU 1 is not duly completed, this may result in the automatic disqualification of the application

PART ONE: PARTICULARS OF ADVERTISED POST (only in case of application for advertised post)

1. Institution: :
2. Post Designation: :
3. Date of Vacancy List :
4. Post Ref Number :

--	--	--	--	--	--	--	--	--	--

PART TWO: PERSONAL PARTICULARS OF APPLICANT

1. PERSAL Number (if any):

--	--	--	--	--	--	--	--	--	--
2. SARS Ref Number:

--	--	--	--	--	--	--	--	--	--
2. Identity Number:

--	--	--	--	--	--	--	--	--	--
3. Surname:
4. Initials:

--	--	--	--



education

MPUMALANGA PROVINCE

REPUBLIC OF SOUTH AFRICA

FORM EDU 2 (REVISED JUNE 2015)

APPLICATION FOR SUBSTITUTION (EDUCATORS)

A. PARTICULARS WITH REGARD TO STATION

CIRCUIT OFFICE: _____ PAYPOINT: _____
INSTITUTION: _____ ENROLMENT: _____

B. PARTICULARS OF EDUCATOR ON LEAVE (OR ABSENT)

EDUCATOR ON LEAVE (OR ABSENT): _____ PERSAL: _____

TYPE OF LEAVE/ABSENCE: _____

REASON FOR LEAVE/ABSENCE: _____

PERIOD FROM: _____ TO: _____

LEAVE FORMS/SUBSTANTIVE DOCUMENTS ATTACHED: ☐ YES ☐ NO

MOTIVATION: _____

C. POST PROFILE

Post specific requirements: The educator is deemed suitably skilled to teach the subjects and/or phases as indicated in Table A below, and is therefore recommended for appointment. Table A: Subjects to be taught (Tutoring Subjects):

Subject(s)	Grades	Phase	Language in which subject(s) will be taught

D. SIGNATURES

DESIGNATION	SGB	HEAD OF INSTITUTION	CIRCUIT MANAGER
SIGNATURE			
NAME			
DATE			

EDU 2 – Request for mandate to appoint an educator on temporary closed contract

- Is replaced by EDU 1



APPLICATION FOR TEMPORARY CLOSED TEACHER EMPLOYMENT

Mark with an X where applicable:

- ☐ Application for substitute closed employment (Refer to Category I Appointments).
- ☐ Application for temporary closed employment of a teacher appointed on a Part Time Basis (Refer to Relevant HRM Directive).
- ☐ Application for temporary closed employment (Prior approval shall be obtained from the relevant delegated official in the District Office or Head Office in respect all categories of teachers indicated in the group of teachers identified as per Departmental Directives.

NOTES:

- (a) In the case of an application for a temporary closed employment and substitute closed employment, Form EDU 3 shall be submitted;
- (b) FORM EDU 4: Notice of Assumption of Duty shall be submitted within 10 working days after actual assumption of duty where prior approval is required and be submitted with the EDU 3 in cases where prior approval is not required Category E - no deviation from appointment criteria;
- (c) In case of Non-South African citizens [Category H Educators] certified copies of valid passport, permanent residency certificates or valid visas, covering the period of employment shall be attached;
- (d) Designated Group of teachers in preference order: serving teachers declared in addition, state funded bursars, professionally qualified serving contract teachers and professionally qualified unemployed RSA Citizens (including new entrants as well as foreign nationals with permanent residence certificates and in possession of and RSA ID) - Refer to Part Four of the EDU 3 for non-compliance;
- (e) Categories of teachers for which prior approval from delegated officials are mandatory (Category E - where deviation from criteria is required as well as professional under qualified and unqualified teachers, Category F - teachers that have exited the public service due to early retirement, ill health retirement, compulsory age retirement, voluntary severance package, Category G - all teachers that have resigned from the public service with effect from 1 May 2015 and who claimed their pension benefits, Category H - Foreign teachers;
- (f) All applicants shall duly complete all sections of Parts 1, 2 and 3 of the Form EDU 3 and sign the declarations and ensure that the required supporting documents are attached; and
- (g) To avoid any delays in the appointments, School Principals in collaboration with SGB Chairpersons shall duly complete Parts 4, 5 and 6 and ensure that all the supporting documents are attached.

Institution: Pay Point Circuit:

PART ONE: PERSONAL PARTICULARS OF APPLICANT

Shortened Service Standards in line with the HRM Directive

- a. No deviation from appointment requirements (prior approval not required), the correctly completed appointment documents with the required attachments shall reach the relevant HR Office by no later than a maximum of 10 (Ten) working days after the assumption of duty date of the said TEACHER if no prior approval is required;
- b. All offices in the line management where the documents are submitted shall append a date stamp on the all the documents on the day it was received;
- c. All offices shall keep thorough record of the movement of the said documents;
- d. HR Offices responsible for appointments shall implement the appointment on the PERSAL System within 10 (Ten) working days of receipt of the duly completed appointment documents, and the relevant officials responsible for Salaries shall authorize said appointments 2 (Two) working days of receipt of the appointment documents from the relevant HR Office;
- e. Deviation from appointment requirements or non-delegated appointments where prior approval is required, the duly completed documents shall be submitted via the line management to the relevant HR Office by no later than a maximum of 10 (Ten) working days of completion of Form EDU 3. Such request for approval shall be prepared and submitted to the delegated official or the relevant receiving official at Head Office within 10 (Ten) working days of receipt of the duly completed appointment documents and the implementation on the PERSAL System shall be effected within 7 (Seven) working days of receipt of the approval from the delegated official;
- f. Confirmation of Appointment Letters shall be issued within 14 (Fourteen) working days after the appointment has been implemented on the PERSAL System.
- g. The relevant official(s) who caused the delay in submitting the required documents shall be held accountable and disciplinary steps shall be instituted against the official(s) that was(were) responsible for the delay(s) for not complying to the prescribed time frames.

1.1. PERSAL Number (if any):	<input type="text"/>
2. SARS Ref Number:	<input type="text"/>
3. Identity No:	<input type="text"/>
4. Surname:	<input type="text"/>
6. Initials:	<input type="text"/>
7. South African Citizen?	YES <input type="checkbox"/> NO <input type="checkbox"/>
8. Date of Birth	YEAR <input type="text"/> MONTH <input type="text"/> DAY <input type="text"/>
9. First names:	<input type="text"/>
10. Title:	DR <input type="checkbox"/> MR <input type="checkbox"/> MS <input type="checkbox"/>
11. Gender	Male <input type="checkbox"/> Female <input type="checkbox"/>

EDU 3 – Application for extension of temporary closed appointment as educator

- Is replaced by Edu 1.



REVISE FORM EDA (3)
(Annexure A)

MPUMALANGA DEPARTMENT OF EDUCATION

ACTING APPOINTMENT EDUCATORS
(IN TERMS OF THE EMPLOYMENT OF EDUCATORS ACT 76 OF 1998 AS AMENDED)

A RECOMMENDATION TO APPOINT AN ACTING EDUCATOR

Surname and Initials: _____ Persal Number: _____
Current Rank: _____ Post Level: _____
Acting capacity: _____ Post Level: _____
Institution: _____ Pay Point No: _____
Period of acting appointment: _____ up to _____

(Acting period may only be for maximum of 12 months, but not exceeding the 31st December of the current year or until the post in question is effectively filled or abolished, whichever date comes first.)

The recommended educator meets all the PAM requirements in terms of the following:

Reqv	<input type="checkbox"/>	Professionally qualified	Yes	No	Years of experience	<input type="text"/>
------	--------------------------	--------------------------	-----	----	---------------------	----------------------

Remarks: _____ Remarks: _____

HEAD OF INSTITUTION DATE(Y/M/D) CHAIRPERSON-SGB DATE (Y/M/D)

Recommended / Not Recommended / Amended:

CIRCUIT MANAGER DATE (Y / M / D)

APPROVAL OF ACTING APPOINTMENT

Approved / Not Approved / Amended:

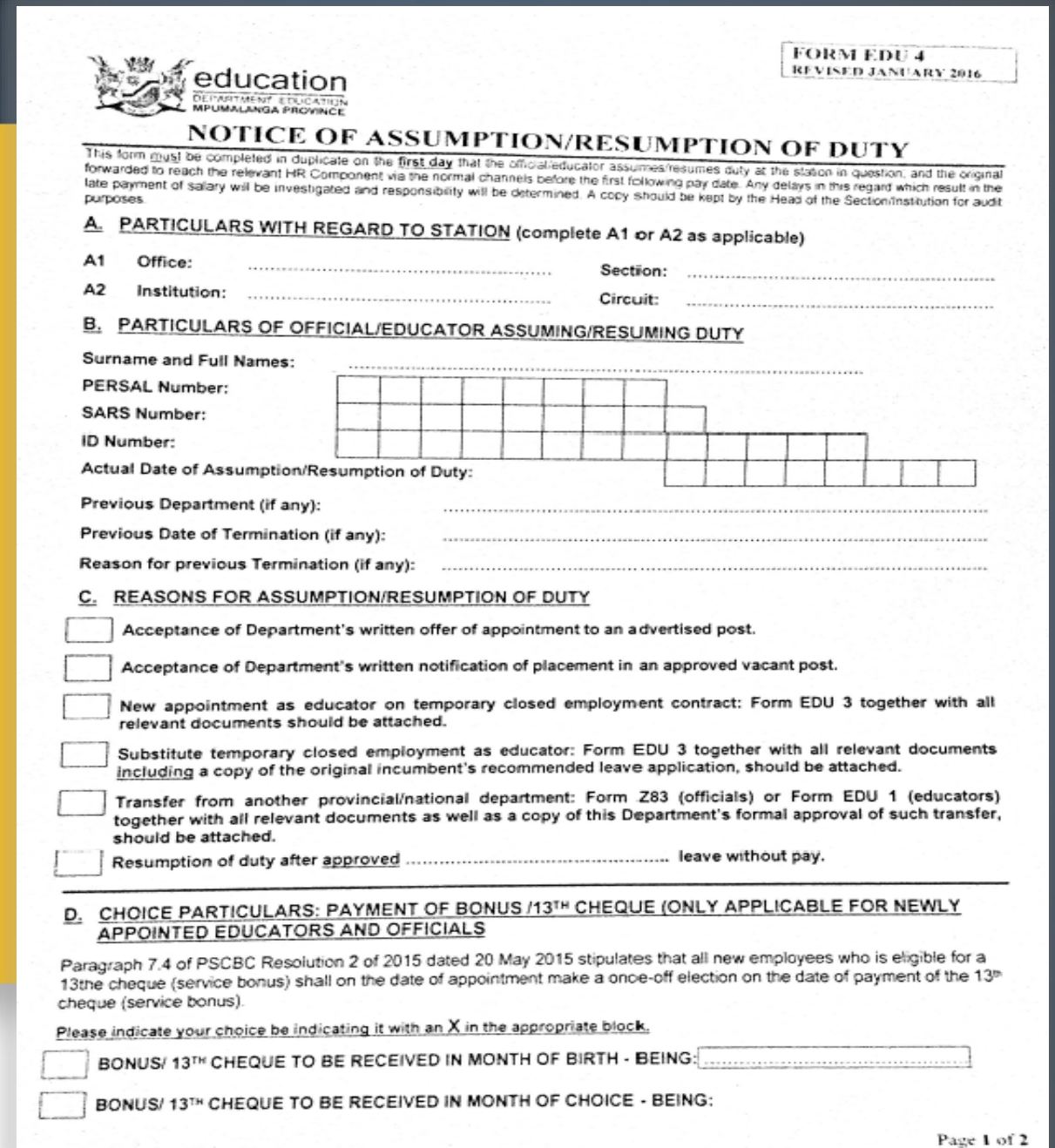
DISTRICT DIRECTOR

DATE (Y/ M/ D)

EDA 3 – Annexure A – Acting appointment: Educators

- Is completed yearly until post is filled.
- Only valid for one year.

- Please ensure that Section D (Bonus) is selected.
- Section E – Repeat Section B
- Section E – Repeat section D
- NB!! Teachers(employees) must sign section F as well as at the bottom of the page



- Used with “termination of service”



Instructions to responsible Line Managers (heads of institutions, circuit offices, divisions, sub-directorates or directorates as applicable)

1. In case of service termination, the responsible line manager should complete and fax the Notice of Suspension of Salary directly to the relevant HR Official within 48 hours of receipt of information on either the termination (resignation, retirement or demise) or the transfer of an employee to another department.
2. where an employee is absent from duty without permission (abscondment) –
 - the responsible line manager should in the case of an educator employed under the Educators Employment Act, complete and fax the Notice of Suspension of Salary directly to the relevant HR Official immediately after 14 days from the last actual date of service - together with the notification letter delivered to the employee in terms of HRM Directive No 13 of 2012, or
 - the responsible line manager should in the case of an official employed under the Public Service Act, complete and fax the Notice of Suspension of Salary directly to the relevant HR Official immediately after 30 days from the last actual date of service - together with the notification letter delivered to the employee in terms of HRM Directive No 13 of 2012.
3. The responsible line manager should submit the original termination/transfer documentation through the line function within 7 working days.
4. Failure to comply with the instructions above will be subject to disciplinary action.

A1 Office: Section:
A2 Institution: Circuit:

Postal code:

--	--	--	--	--

I herewith certify that the above-mentioned employee's salary should be suspended with immediate effect.

DATE _____

- **A3 – “Early retirement” under the age of 65.**

MPUMALANGA DEPARTMENT OF EDUCATION



**NOTICE OF EMPLOYMENT OF AN EDUCATOR WHOSE
PREVIOUS TEMPORARY CLOSED EMPLOYMENT CONTRACT
HAS EXPIRED, AT AN ALTERNATIVE INSTITUTION**

1. Particulars of Educator:

Surname and Initials:

PERSAL Number:

--	--	--	--	--	--	--	--	--	--

Rank:

ID Number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

SARS Number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Previous Contract expiry date:

2	0	0									
---	---	---	--	--	--	--	--	--	--	--	--

Previous Institution:

Previous Pay point:

--	--	--	--	--	--	--	--

2. Notice is hereby given that the above-mentioned educator has been employed on a closed temporary basis at an alternative institution with the following particulars:Date of assumption of duty :

2	0	0							
---	---	---	--	--	--	--	--	--	--

Name of Institution :

Pay point:

--	--	--	--	--	--	--	--

Total number of educators employed at institution (including serving educators and those absent on leave - all post levels) :

Total number of educators for which institution may qualify in terms of its current approved post establishment (all post levels) :

3. The mentioned educator is qualified to teach the subjects indicated in Table A below and will teaching the subjects and / or phases as indicated in Table B below**Table A: Subjects Qualified to Teach:**

(The specific phase of teaching experience should be indicated in the column provided i.e. Foundation, Intermediate, Senior, FET or a combination of the relevant phases)

Subjects	Grades	Phase	Language In Which You Can Teach Subject

**EDU 7 – Previous
temporary closed
employment contract
has expired, at an
ALTERNATIVE institution**

- **Transfer of Temporary Teachers within the Province.**

- Principal submits during November/ December of each years until teacher is appointed permanent.



FORM EDU 8 AS REVI SED 2015/03

education

MPUMALANGA PROVINCE
REPUBLIC OF SOUTH AFRICA

NOTICE OF EMPLOYMENT OF AN EDUCATOR WHOSE PREVIOUS TEMPORARY CLOSED EMPLOYMENT CONTRACT HAS EXPIRED, AT THE SAME INSTITUTION

I. Particulars of Educator:

1. PERSAL Number (if any):

2. SARS Ref Number:

3. Identity Number:

4. Surname:

5. Initials:

6. Date of Birth

7. First names:

8. Title:

9. Residential Address :

Complex Number:

Street Number:

Suburb / District:

City Town:

10. Tel Dialing code:

11. Cell Number:

12. Postal Address:

13. Post Office:

14. Magisterial District:

Previous Contract expiry date:

Previous Institution:

Complex name:

Street name:

Postal code :

Phone number:

Postal code :

Previous Pay point:

II. Notice is hereby given that the above-mentioned educator has been employed on a closed temporary basis at the same institution with the following particulars:

Date of assumption of duty

Name of Institution:

Total number of educators employed at institution (including serving educators and those absent on leave)

Total number of educators for which institution may qualify in terms of its current approved post establishment

Pay point:

Page 1 of 3

EDU 9 – Notice of relocation to ALTERNATIVE institution WITHIN the department

- Transfer of Permanent employees within the province.
- School that the teacher transfers to must start the process.



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REPUBLIC OF SOUTH AFRICA

FORM EDU 9 AS REVISED 2015/03

NOTICE OF RELOCATION OF A SERVING EDUCATOR (EXCLUDING AN EDUCATOR WITH TEMPORARY CLOSED EMPLOYMENT CONTRACT), TO AN ALTERNATIVE INSTITUTION WITHIN THE DEPARTMENT

a) Please note that written approval for relocation of a serving permanent/temporary open educator to an alternative institution within the Department will only be granted subject to the following:

- that a suitable vacant post exists in terms of the current approved post establishment;
- that the relocation is effected with retention of salary level and other conditions of service; and
- that the Certificate of Release from the previous institution has been duly completed.

b) In the case of educators employed on temporary closed employment contract, **Form EDU 7** should be completed for appointment at an alternative institution.

c) Form EDU 9 is not applicable in the case of transfers between departments/provinces, as these may only be effected with the prior approval of the Head of Department or delegated official.

I. Particulars of Educator:

1. PERSAL Number

2. SARS Ref Number:

3. Identity Number:

4. Surname:

5. Initials:

6. Date of Birth

7. First names:

8. Title:

9. Residential Address :

Complex Number:

Street Number:

Suburb / District:

City Town:

10. Tel Dialing code:

11. Cell Number:

12. Postal Address:

13. Post Office:

14. Magisterial District:

Previous Institution:

Complex name:

Street name:

Postal code :

Phone number:

Postal code :

Previous Pay point:

Page 1 of 3

Isithoko le-Temphurafu *Iminyango weFundo* *Departement van Onderwys* *Indawawulo Ya Dyomile*
**APPLICATION FOR APPROVAL FOR RE-APPOINTMENT OF EDUCATORS AFTER VOLUNTARILY
TERMINATION OF SERVICE**

This form must be duly completed for all educators who apply to be re-appointed after a termination of services. Please note that prior approval shall be obtained for any educator to be re-appointed irrespective of the nature of appointment. The request for re-appointment will only be processed provided that all the required information and documentary proof is attached and no ex post facto request will be processed.

The following document shall be attached to this Application Form:

- EDU 1 Application for teaching Post;
- Recently Certified (not older than 3 months) Copy of ID document;
- Certified Copies of (not older than 3 months) Academic and Professional Qualifications including Academic Transcript;

a. PERSONAL PARTICULARS:

PERSAL No:											ID Number:												
Surname:																					Initials:		
First Name(s):																							

b. PROSPECTIVE EMPLOYMENT PARTICULARS:

Pay Point:											Institution:										
Circuit:											District										

c. PREVIOUS EMPLOYMENT PARTICULARS:

Pay Point:											Institution:										
Circuit:											District										
Termination Date:											Termination Reason										

d. QUALIFICATION:

TERTIARY INSTITUTION ATTENDED	QUALIFICATION OBTAINED	DATE OBTAINED	SUBJECTS PASSED

e. SUBJECTS QUALIFIED TO TEACH:

(The specific phase of teaching experience should be indicated in the column provided i.e. Foundation, Intermediate, Senior, FET or a combination of the relevant phases)

SUBJECTS	GRADES	PHASE	LANGUAGE IN WHICH YOU CAN TEACH SUBJECT



EDU 10 – Application for approval for re-appointment after voluntarily termination of service

- HOD to approve appointment.

PENSION

- ❖ GEPF – Government Employees Pension fund was established in May 1996.
 - ❖ It is a fixed benefit fund.
 - ❖ The fund is for government service officials only.
- ❑ GPAA – Government Pensions Administration Agency (Is not Gauteng's Pension Division) 😊
 - ❑ Handles all administrative matters for GEPF – responsible to the Minister of Finance and members.
 - ❑ There is a "Service Level Agreement" between National Treasury and GEPF

GEPF vs GPAA?

How much does a member of GEPF contribute to the pension fund and how much does the state contribute?

- GEPF members contribute 7.5% of their pensionable salary.
- The employer's contribution is 13% of your pensionable salary.



HOW DO I END MY SERVICE?

According to the "Employment of Educators Act 76 of 1998":- the educator must give notice in writing 90 days prior to termination of employment.

The employer may, however, approve that a resignation/retirement be accepted with a shorter notice.



What STEPS should be followed with Termination of service ?

All terminations are administered by the District Office.

Follow these steps:-

Decide on an exit date.

Start the process 3 – 6 months in advance (documents are valid for only 6 months).

Remember to give 90 days' notice (get permission if necessary).

Ask the SAOU for a calculation of pension benefits (check capped leave and pension start date).

Discuss your pension benefits and options with your broker.

Keep copies of all documents handed in to the District Office.



SAOU

TYPES OF TERMINATION OF SERVICE

SAOU

MANDATORY RETIREMENT: 65

NORMAL RETIREMENT: 60 – 65

EARLY RETIREMENT: 50 - 59

RESIGNATION: ANYTIME

MEDICAL RETIREMENT: Decision taken by DBE

DEATH



SERVICE BENEFITS UPON RETIREMENT

- Capped Leave is payed out (If applicable)
- Life Long monthly Pension
- Spouse/Partner receives 50% or 75% monthly spouse pension (Member to make a choice)
- 75% a quotation is required
- Lifelong medical subsidy
 - Must be main medical provider
 - At least 10 years of service can be broken up
- Payment of Savings (Housing-Tenant)
 - R 15 000 – Member and Spouse (If both is working in Government you claim R30 000)
 - R 6000- Members Children

ALL BENEFITS ARE FORFEITED UPON RESIGNATION

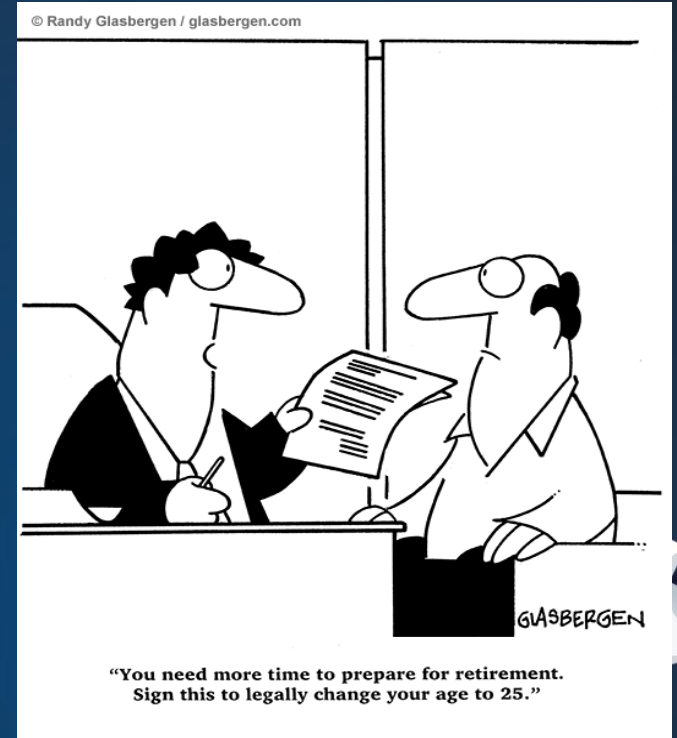
SΔOU

Happy
Retirement!

Early Retirement (50 – 54 years of age)

ONLY educators may from 50 years of age retire on the condition:

- ✓ **Must have been appointed before May 1, 1996**
- ✓ **Need to ≥ 10 years pensionable service**
- ✓ **Must obtain permission from the HOD of the relevant province if under 55 years of age.**
- ✓ **Penalization of 0.33% per month.**



Early Retirement (55 – 59 years of age)

Benefits less than 10 years' service

- Lumpsum in line with the Actuarial value is paid out
- NB- You will keep your medical aid subsidy if you have 15 years or longer service within the Government sector (can be broken up periods) and if you were the main member for the last year before you retire
- Pro-rate bonus will be paid
- Savings from housing (tenant) will be paid out.
- If resignation documents is completed member will lose all benefits mentioned above (bonus, housing)



- ✓ **Any government employee can retire at the age of 55**
- ✓ **No approval is required**
- ✓ **Penalization of 0,33% per month up to the age off 55 is applicable**

UNION

Early Retirement (55 - 59 years of age)

Benefits (MORE than 10 years of service)



- ✓ One-time lumpsum/gratuity is payed out.
- ✓ Monthly pension
- ✓ NB Retains medical subsidy if 15 years or longer in service of the state - can broken service
- ✓ Have to be the principal member of scheme in last year
- ✓ of service.
- ✓ Pro-rata bonus and accumulated leave will be payed out
- ✓ Funeral and relocation benefit is retained.
- ✓ Savings from housing (Tenants) will be paid out.

DOAS

Normal Retirement (60 - 65 years of age)

DOAS

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www.glasbergen.com



"Here's our retirement plan: at age 65,
we'll get divorced then marry other
people who planned better."

Benefits (LESS than 10 years of service)



- ✓ One-time amount equal to the actuarial
- ✓ value will pay out
- ✓ NB Retain medical subsidy if 15 years or
- ✓ longer in service of state - can broken service
- ✓ be and principal member of scheme in last year
- ✓ of service).
- ✓ Pro-rata bonus will pay out.
- ✓ Request housing's savings.

No Penalization

Normal Retirement (60 - 65 years of age)

Benefits (MORE than 10 years of service)

-
- Lumpsum payout(one-third)
-
- Monthly pension (Increased every April)
-
- NB Retain medical subsidy if 15 years or Longer in service of state - can be broken service and have to be a principal member of scheme in last year of service).
-
- Pro-rata bonus and accumulated leave will pay out.
-
- Maintain funeral and relocation benefit.
-
- Request housing's savings.



NO PENILISATION

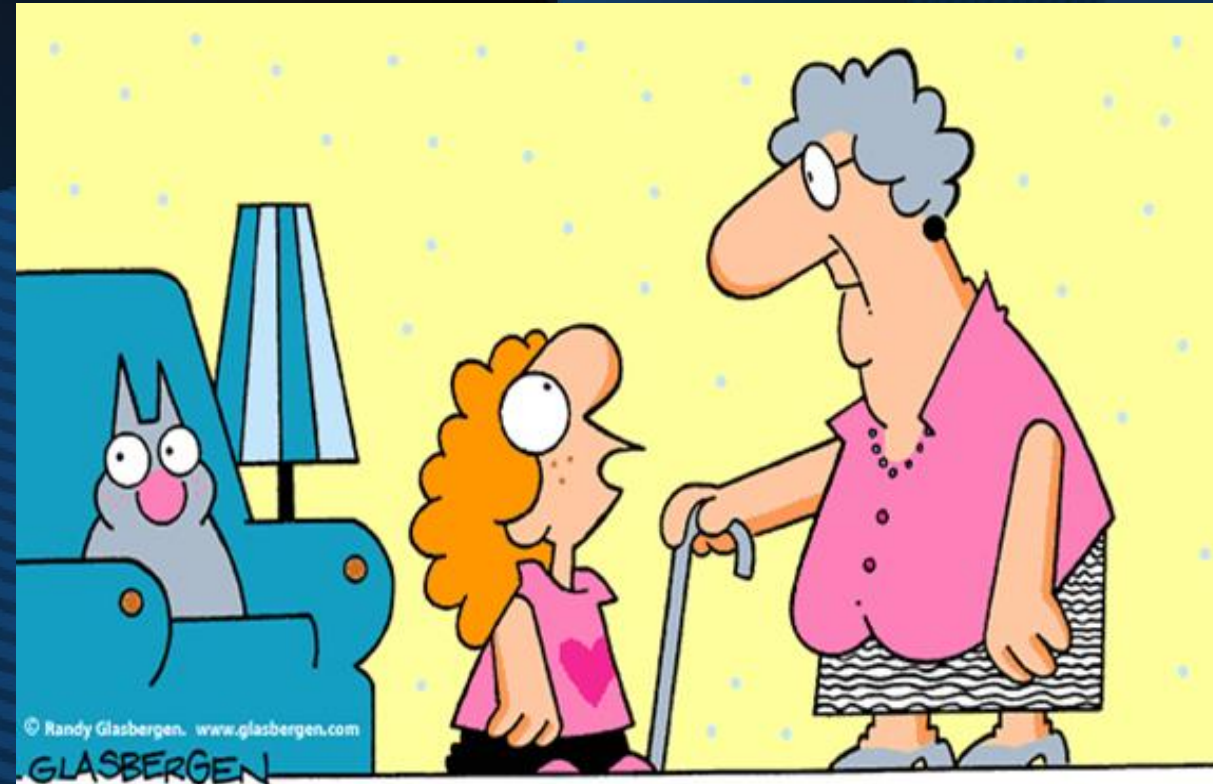
UNION

COMPULSARY RETIREMENT

Benefits (LESS than 10 years of service)

- ✓ One-time amount equal to the actuarial
- ✓ value will pay out
- ✓ NB Retain medical subsidy if 15 years or
- ✓ longer in service of state - can broken service
- ✓ be and principal member of scheme in last year
- ✓ of service).
- ✓ Pro-rata bonus will pay out.
- ✓ Request housing's savings.

Teachers and PS employees
are compelled to retire at the
age of 65



“My teacher says little girls can grow up to be anything they choose! Why did you choose to be an old lady?”

COMPULSARY RETIREMENT

Benefits (MORE than 10 years of service)

- Lumpsum payout(one-third)
- Monthly pension (Increased every April)
- NB Retain medical subsidy if 15 years or Longer in service of state - can be broken service and have to be a principal member of scheme in last year of service).
- Pro-rata bonus and accumulated leave will pay out.
- Maintain funeral and relocation benefit.
- Request housing's savings.

Only Teachers appointed before 2 Sept 1994 can apply to continue service until December of that year
Refer to the Employment of Educators Act ,1994- Chapter 4 , Article 10 (2) and (3)

SAOU



MEDICAL RETIREMENT- ANY AGE

✓ Benefits (LESS than 10 years of service)

- ✓ One-time amount equal to the actuarial value will pay out
- ✓ NB Retain medical subsidy if 15 years or longer in service of state - can broken service
- ✓ be and principal member of scheme in last year of service).
- ✓ Pro-rata bonus will pay out.
- ✓ Request housing's savings.
- ✓ Maintain funeral and relocation benefit.

➤ Benefits (MORE than 10 years of service)

- Lumpsum payout(one-third)
- Monthly pension (Increased every April)
- NB Retain medical subsidy if 15 years or Longer in service of state - can be broken service and have to be a principal member of scheme in last year of service).
- Pro-rata bonus and accumulated leave will pay out.
- Maintain funeral and relocation benefit.
- Request housing's savings.

MEDICAL RETIREMEN

(Any Age below 60 years)

SΔOU

Benefits (less than 10 years' service)

- One-time amount paid equal to the actuarial value plus One third will be paid out
- NB Retains medical subsidy if 10 years or longer in service of the state – can broken service
- Have to be the principal member of scheme in last year of service.
- Pro-Rate Bonus will be paid



DEATH - In Service

Benefits (More than 10 year service)

- Lumpsum pays out to beneficiary or estate.
- Monthly pension (spouse).
- Retain medical subsidy if the member was at least 50 years old (otherwise the spouse would wait until member would be 50).
- Accumulated leave and pro-rata bonus are paid out (spouse).
- Funeral benefit is retained (spouse).
-

Benefit (Less than 10 year service)

- Lump sum (actuarial value) OR the value of the final salary bracket is paid out to beneficiary or estate.
- NB Retain medical subsidy if the member was at least 50 years old (otherwise the spouse would wait until member would be 50).
- Pro-rata bonus is paid out (spouse).
-



SAOU

DEATH - AFTER RETIREMENT

Benefits (Within 5 years of retirement)

1. Remaining balance of lump sum paid to beneficiaries or estate.
2. Monthly spouse pension.
3. Retain medical subsidy if deceased was the main member.
4. Retains funeral benefit (spouse).
5. Retain funeral benefit – Member.
- 6.

Benefits (5 or more years after retirement)

Monthly pension value 50% or 75% of deceased's pension shall be paid to the spouse or partner.

NB Retains medical subsidy if deceased was the main member.

Retains funeral benefit (spouse).

Retain funeral benefit – Member.

- ✓ Should you marry after retirement, your spouse will be able to obtain the spouse's pension if you die.
- ✓ If your spouse receives your pension and remarries, his new spouse will not receive the pension upon his/her death.
- ✓

RESIGNATION- ANY AGE

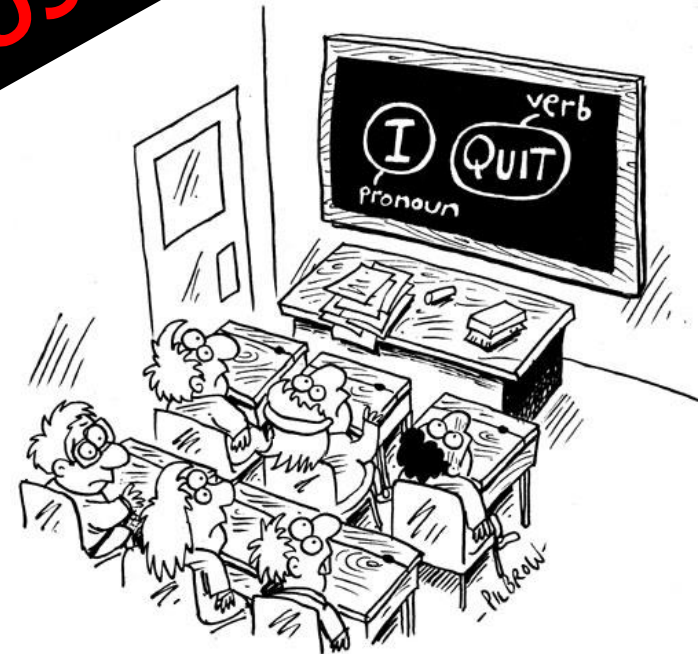
TAX ON PAID
AMOUNT

OPTION 1: Have it paid into your bank account as a cash lump sum.

OPTION 2: Transfer it to an approved retirement fund.

NO TAX IS PAID ON THIS OPTION

**ALL BENEFITS IS FORFEITED, NO
MATTER WHICH OPTION IS
CHOSEN**



CHILDREN'S PENSION BENEFIT

NEW:- Resolution 1/2017 (If member dies on or after June 1, 2018)

Your biological/legally adopted children qualify for child pension:-

- Eligible until age 22 - Disabled children, regardless of their age and dependence

(GEPP must obtain proof of disability from two different specialists to register your child as a disabled child)

Register your child now. Neither you nor the family need to wait for something to happen.

SAOU



NOTE:



You must make the following registrations:-

- Life partner – so he/she can get all the benefits
- Spouse - Disabled child (remember evidence from two specialists/doctors who declare your child disabled)

If you resign you lose ALL benefits

Divorce documents must be handed in with termination of employment (complete document)

While waiting for your pension application to be completed you MUST pay the full medical installment.

Give permission to the fund to deduct it directly from your bank account Inform GEPP if any personal information changes via Z864

Divorce – you do not have to make your pension part of the divorce even if you are married in community of property.
Payouts have changed – contact Service Centre if you want to know more.

Medical subsidy – you should have worked for the state (it's not pension contributing years that count)

You can AND may resign when you turn 65 – no law obliges you to resign a month before 65 if you want to withdraw all your money from the fund.

Z102 – must fill in the employers – not the employee.

Please visit GEPF's web for latest forms and information.

MAIN:- PLEASE REFER ALL PENSION ENQUIRIES TO THE SERVICE CENTRE

SAOU



012 023 1333
076 127 1921
saou@saou.co.za
www.saou.co.za



TAX

It is important that you as a member understand the different tax implications when benefits are paid. As a member of GEPF, any benefits which you have accrued prior to 1 March 1998 will be tax free. Any benefits accrued since then will be taxed.





www.gepf.co.za

enquiries@gpaa.gov.za

Call center - 0800 11 7669

HOOFKANTOOR

Trevenna Campus

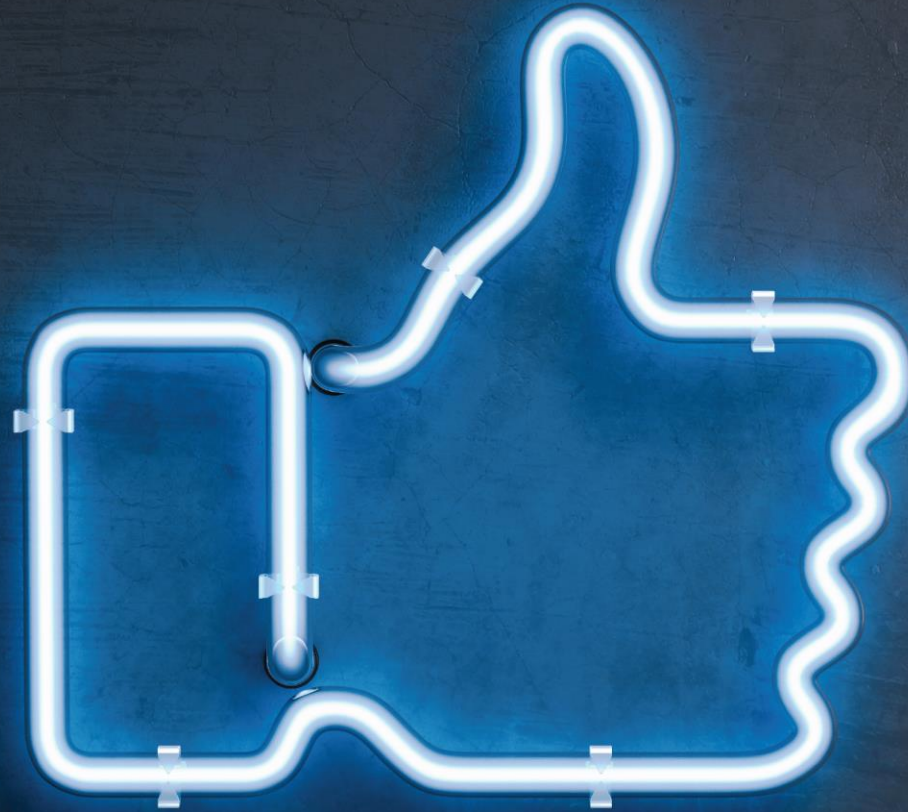
H/v Francis Baard en Meintjies

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