



In this newsletter the following aspects are dealt with:

- 1. Provincial training for SAOU School Representatives.*
- 2. Questions from members regarding early retirement without penalization.*

SAOU School Representatives!

SAOU School Representatives should please diarize the following dates, specifically for training that will take place nearest to your school. This training will, as in the past, deal with the latest developments in education on service benefits and other relevant issues.

The training will start at 9:00 am and finish around 14:00 pm. Because we are go all over the province with this training, it will mean that the groups will be smaller and thus leave plenty of room for specific issues you may experience at your school. We will let you know of the venues in due course.

<i>April 29</i>	<i>Modimole</i>
<i>May 2</i>	<i>Marble Hall</i>
<i>May 3</i>	<i>Polokwane</i>
<i>May 14</i>	<i>Ellisras</i>
<i>May 21</i>	<i>Phalaborwa</i>
<i>May 23</i>	<i>Burgersfort</i>
<i>May 28</i>	<i>Messina</i>

Early Retirement?

Many questions about early retirement without penalty were received from members. It appears that the Education Department in Limpopo has not yet been able to answer educators' questions. Based on the guidelines provided by the Department of Public Service and Administration, we will attempt to address the most common questions of members around this issue.

What does the announcement by the Finance Minister in February of the so-called "packages" for civil servants entail?

The Minister referred to the South African public service which is far too big and therefore the salary bill is also far too large. It has therefore been decided to abolish 30 000 public service posts. These posts will be reduced across the broad spectrum of the public service. However, there is no question of financial benefit contained in this offer.

How many of those posts will be allocated to the education sector?

No formal commitment has been made to different sectors, but recent surveys of the 9 different provinces have shown that around 127 000 educators (between 55 and 60 years old) are employed by the public service.

What is the process to be followed?

- 1. Each public service department must appoint a task team to draw up a management plan. (The LDE may even decide to set up a task team at each district which will then report to a provincial task team.) This management plan should then be distributed to the prospective applicants, i.e. in the case of SAOU members, to the respective schools of Limpopo.*
- 2. Applicants between the ages of 55 and 60 must write a letter to their employer requesting permission to make use of this offer. The offer referred to is to retire without penalization.*
- 3. The principal must also complete the prescribed form and recommend or not recommend the retirement. (Note: the principal does not have the power to reject the application)*
- 4. An application form was issued from national level to provincial departments. This form should also be completed and attached to the letter.*
- 5. These applications must be submitted between 1 April and 31 August 2019 to the Limpopo Department of Education.*
- 6. A set of criteria has already been compiled that must be strictly followed by the task team when these applications are reviewed.*
- 7. Successful application's cost implications are calculated and sent to the Limpopo Treasury.*

8. *The process followed must then be checked by a monitoring team to determine whether the criteria have been consistently applied to all applications.*
9. *Limpopo Treasury sends cost calculations to National Treasury.*
10. *Successful applicants are notified and can proceed with the submission of retirement documentation.*

If my application is successful, when may / should I retire?

Applicants' retirement date must still be in the current financial year, i.e. before April 2020.

Are there other benefits to this offer?

No, your pension's value is calculated as on the day you want to exit the Department of Education in Limpopo. You also retain all the usual benefits that apply to you; pro-rata bonus, accumulated leave, resettlement costs, accumulated savings (as tenant) in savings account, medical subsidy, once-off lump sum and monthly pension for the rest of your life.

What should be in the letter I write to the LDE?

You need to motivate why the LDE should approve your early retirement application without penalization. Strong motivational points can be:

1. *If you can prove that you will never again depend on the state for an income or health care, except of course the monthly pension. The current life expectancy is around 90 years. Retiring now at age 55 means you will have to be self-sufficient for at least the next 35 years, taking into account inflation and CPI.*
2. *Motivate why the school, and education in the province, will not be negatively affected by your exit (retirement).*
3. *Planned immigration (attach evidence).*

What criteria will the LDE use in the selection process?

Same criteria as other provinces will use. Each task team must determine the following:

1. *Is the applicant between 55 and 60, and will it still be the case by the end of the current financial year?*
2. *What negative consequences will this person's retirement have on the activities of the LDE, if any?*
3. *Will a specific skills shortage arise if this educator exits the LDE?*
4. *Are all human resource requirements taken into account?*

5. *Will there be a fiscal saving in the future if this educator exits the system?*
6. *What additional factors were taken into account over and above the post provisioning standards and departmental structures, e.g. distribution of race, gender, etc. on organograms?*
7. *Have the applicant's personal circumstances and possible future career opportunities been taken into account?*
8. *Have the number of years of service of the applicant been taken into account?*
9. *Has preference been given to applicants closer to 60 years?*

What factors may hamper my application?

1. *If you have less than 10 years of pension contributions.*
2. *If you offer a scarce subject such as Mathematics or Science. (Scarce subjects may vary from province to province, but the above will be listed in all provinces). Scarce subjects may also include special skills subjects and special education.*
3. *The post level you hold and the grades you teach? (All post levels will first be weighed against the organogram of the department to avert potential vacuums in skill, race or gender)*

If my application is successful, can I withdraw it?

Yes, you may still withdraw your application within 30 calendar days (including weekends) after you were granted permission to access the offer of early retirement without penalization. NOTE: When you receive the letter of approval, the Provincial Treasury (Limpopo) has already been provided with calculations that may indicate a specific saving that your retirement may bring about. To withdraw an application after having received permission, incur unnecessary administrative burdens.

May I ever be re-appointed by the Education Department after retiring with this benefit?

Yes, under the following conditions:

1. *Only with permission of the Head of the Education Department in that province.*
2. *Only on a contract basis for a specific period. (On entry level salary or at the highest 6 (six) notches above)*
3. *It will only be in extreme scarce - or skills subjects.*
4. *Only after age 60, because you received the benefit (as if you were already 60) to retire without penalization.*
5. *You will not be able to contribute to the government pension fund again.*



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