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Enquiries: Call Centre

Strategic People Management Minute: 0001/2019

To: Deputy Directors-General, Chief Directors, Directors, Deputy Directors, Heads: Curriculum Support, Circuit Managers, Principals and Heads of educational institutions

Subject: Appointment of principals on probation

1. The National Development Plan calls for a change in the appointment process to ensure that competent individuals are attracted to form part of the institution's Senior Management Team.
2. The purpose of the probationary period is to establish whether there is an appropriate match between the person, the job and the work environment, and whether a good working atmosphere has been established within the School Management Team.
3. The appointment of educators on probation is governed by the Personnel Administration Measures (PAM), as amended in February 2016, and the Employment of Educators Act (EEA), 1998 (Act 76 of 1998).
4. The "Appointment on probation" measures as defined in section B.3.3 of the PAM are as follows:
  - "B.3.3.1 An educator's first appointment to education in a permanent capacity will be on probation for a period of 12 months, which may be extended, on good cause shown, for a further period not exceeding 12 months. An educator must be informed in writing of the intention to extend his/her probation period.
  - B.3.3.2 An employer may approve the secondment, transfer or promotion during his/her period of probation, provided that the educator remains on probation for a total period, including the period served in the former post, of at least 12 months.

- B.3.3.3 If deemed necessary, the employer may require that the appointment of an educator to a promotion level to be on probation, provided that the conditions in paragraphs B.3.3.1 and B.3.3.2 apply.
- B.3.3.4 If the performance of an educator on probation complies with the relevant requirements as set out in the performance management system, his/her permanent appointment may be confirmed.
- B.3.3.5 An educator's permanent appointment will only become effective once he/she is informed in writing by the employer to that effect. The employer must inform the educator within 6 months after expiry of the probation period or extended probation period of the educator's permanent appointment or otherwise."

5. In order to comply with the requirements of the PAM, the Western Cape Education Department has since the release of SPECIAL VACANCY LIST 2 OF 2017 appointed principals on probation. This has been clarified in section 5.9 of the preface of the vacancy list as follows:

"a. All principals appointed in a permanent capacity will be on probation for a period of 12 months, which may be extended on good cause shown for a further period not exceeding 12 months."

- 6. The procedure for the confirmation of probation appointments are described below.
  - 6.1 Circuit Managers must complete the attached quarterly review immediately on expiry of the prescribed period of 12 calendar months in order to confirm the probationer's permanent appointment. Line managers and supervisors must ensure that the steps below are followed when they complete the forms:
    - 6.1.1 The existing Integrated Quality Management System (IQMS) instrument will be used to ensure compliance with current legislation (i.e. Collective Agreement 8 of 2003).
    - 6.1.2 The processes and structures of the IQMS will apply.
    - 6.1.3 Probation will be for a period of 12 months, with one review at the end of a quarter.
    - 6.1.4 Three quarterly reviews will be conducted, with the summative evaluation concluding on the probationary process.
    - 6.1.5 Each quarterly review will monitor and evaluate the progress and competence of principals.

- 6.1.6 Where necessary, intervention, support and development programmes will be implemented immediately.
- 6.1.7 Quarterly reviews will not be scored, but rather serve as an early means of identifying areas for improvement.
- 6.1.8 The quarterly reviews will support the final scores and ratings of the summative evaluation.
- 7. Kindly bring the content of this minute to the attention of all staff under your supervision.

SIGNED: LJ ELY

DEPUTY DIRECTOR-GENERAL: CORPORATE SERVICES

DATE: 2019-01-29



CONFIDENTIAL

QUARTERLY REPORT: PRINCIPAL ON PROBATION

This report must be filled in by the principal's immediate supervisor. Reporting commences immediately three months from the date of appointment. Both the principal on probation and immediate supervisor must sign this document. At the end of the probationary period, the supervisor must submit the original four quarterly reports to the Directorate: Strategic People Management. Copies are to be kept by the principal and supervisor.

Name : .....

PERSAL No. ....

Period: ..... to .....

Quarterly Report No.

1 2 3 4

Table with 4 columns: Insert X in appropriate column, Satisfactory, Unsatisfactory, Comments. Rows include Curriculum Management, Assessment Management, Managing Human Resources, Administration, Leadership & Governance, and Managing Finances & Resources.

Identified Developmental Areas:

- |          |           |
|----------|-----------|
| 1. _____ | 2. _____  |
| 3. _____ | 4. _____  |
| 5. _____ | 6. _____  |
| 7. _____ | 8. _____  |
| 9. _____ | 10. _____ |

Additional remarks relating to the confirmation of the probationary period:

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_____	_____	_____
Supervisor	Rank	Date

If the principal on probation desires to submit representations in connection with the contents of the report, he should do so separately.

NOTED	
_____	_____
Principal on probation	Date