



the dpsa

Department:
Public Service and Administration
REPUBLIC OF SOUTH AFRICA



national treasury

Department:
National Treasury
REPUBLIC OF SOUTH AFRICA

GENERIC MANAGEMENT PLAN FOR EARLY RETIREMENT

(Departments to customise and come up with own management plan)

Focus Area	Action	Target Date	Responsible Person
HR Office	Arranges ER briefing sessions with all Programme Managers and HR employees.		Name: Designation: Tel No: E-mail:
	Arranges ER briefing sessions with targeted employees (55-59 age)		Name: Designation: Tel No: E-mail:
	Calculate pension and other benefits for interested employees for ER		Name: Designation: Tel No: E-mail:
	Establishes timeframes within which employees must submit applications to supervisor		Name: Designation: Tel No: E-mail:
	Establish the ERAC (if applicable) at lower structural level and DERM (compulsory)		Name: Designation: Tel No: E-mail:

	<p>Develop an HR plan ensuring the required resources for organisation are in place taking into consideration the following criteria's:-</p> <ul style="list-style-type: none"> • Service Delivery Impact • Reorganisation • Transformation • Skills Needs • HR Planning Implication (Estimate number of personnel can be relinquished without affecting service delivery) • Financial Plan(Those who applied for ER inclusive of projected savings) • Human Resources Budget Plan 		<p>Name: Designation: Tel No: E-mail:</p>
Project Team	<p><u>Early Retirement Assessment Committee(ERAC)</u></p> <p>Scrutinise individual applications to ascertain that consistent, fair and equitable assessments have taken place</p> <p>Assess and cost the cumulative applications (pro-rata service bonus, capped leave above 160 days, unused annual leave and resettlement costs where applicable)</p>		<p>Name: Designation: Tel No: E-mail:</p>
	<p><u>Departmental Early Retirement Moderating Committee (DERMC) – Part 1</u></p> <p>To moderate ER applications and consider recommendation of ERAC.</p> <p>Creates a spreadsheet in the prescribed format for submission to the CAC.</p> <p>Ensures that the decisions made comply with relevant criteria and that all legal prescripts have been adhered to before approval by the EA or delegated person</p>		<p>Name: Designation: Tel No: E-mail:</p>

	<p>Office of the Premier</p> <p>Assess departmental plans submitted to the OTP and give inputs on the following at a whole of province level: Service delivery impact (will the province be in a position to continue delivering services as per its mandate?) Transformation (will the province be in a position to meet its demographic targets?) Skills needs (Will the province be in a position to retain adequate and requisite skills to deliver on its mandate?)</p> <p>Overall, submission to the CAC should be what is agreed for the province as a whole. The OTP and PTs should agree on the working arrangements between themselves. It is recommended that submissions to the CAC are forwarded on 15th and 30th of each month</p> <p>Monitoring of implementation and reporting: Report on progress with implementation of ER programme on quarterly basis to the DPSA:</p>		
	<p><u>Provincial Treasuries</u></p> <p>Assess departmental plans submitted to the OTP and give inputs on the following at a whole of province level: Financial plan (NT Excel funding motivation tool) (Will the province be in a position to achieve the savings targets required?)</p>		

	<p>Human resource budget plan or equivalent (Will the province be in a position to remain within new compensation ceilings as set?)</p> <p>Overall, submission to the CAC should be what is agreed for the province as a whole. The OTP and PTs should agree on the working arrangements between themselves. It is recommended that submissions to the CAC are forwarded on 15th and 30th of each month</p> <p>Monitoring of implementation Report to the CAC on the following quarterly: List of posts per salary level per exit mode per occupation as well as associated average earnings of each of the financial years for the relevant MTEF List of relevant vacant posts per salary level per occupation that are filled per nature of appointment as well as associated average earnings of each of the financial years for the relevant MTEF Assessment of net savings associated with average unit cost management activities related to the points above</p> <p>The provincial treasury report is to be consolidated with the OTP report</p>		
	<p><u>National Treasury's Central Assessment Committee (CAC)</u></p> <p>The CAC will monitor the compliance of departments with the criteria and guidelines for early retirement Reviewing and assessing department submissions for early retirement funding and make a decision on funding</p>		

	<p><u>Departmental Early Retirement Moderating Committee (DERMC) – Part 2</u></p> <p>DERMC will need to assess the funding versus what application were made and the needs of the department. DERMC to make a final recommendation to the EA</p>		
Executive Authority	<p><u>Executive Authority</u></p> <p>EA approval</p>		<p>Name: Designation: Tel No: E-mail:</p>
HR	HR to communicate the outcome of the application to the applicants		
	Appeals to be submitted to HR in line with normal internal labour relations processes		
HR Exit Management	Submission of Exit documentation to GPAA for payment of ER claims		