



higher education & training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

TRANSFER AND RELOCATION POLICY

POLICY CUSTODIAN	Human Resource Management and Administration
POLICY VERSION	
APPROVAL DATE	
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A. Acronyms

ACRONYM	DEFINITION
CET	Community Education and Training
DHET	Department of Higher Education and Training
DPSA	Department of Public Service and Administration
PSCBC	Public Service Co-ordinating Bargaining Council
TVET	Technical and Vocational Education and Training

B. Glossary of Terms

TERM	DEFINITION
ACCOMMODATION EXPENDITURE	Includes expenditure in respect of lodging, meals, and non-alcoholic beverages taken with meals, dry-cleaning, laundering and parking.
DEPARTMENT	Department of Higher Education and Training including regional offices, TVET and CET Colleges.
EMPLOYEE	means a person appointed by the Department of Higher Education and Training in terms of the Public Service Act or a person appointed by Public TVET College Council in terms of the Continuing Education and Training Act, as the case may be.
EMPLOYER	Means the Department of Higher Education and Training or Public TVET or CET College Council, as the case may be.
FIXED-TERM CONTRACT	means a contractual relationship between an employee and an employer that lasts for a specified period. For purposes of this policy, any contract which lasts for 24 months or more will be regarded as a <u>fixed-term long contract</u> and any contract which lasts for less than 24 months will be classified as a <u>fixed-term short contract</u> .

IMMEDIATE FAMILY MEMBER	Means spouse/life partner, parent, adoptive parent, grandparent, minor, or adult children, including an adoptive child, grandchild or sibling who are still dependants and other relatives who live with the Employee <u>except when attending an educational institution</u> , or who relies on the Employee for the bulk of his subsistence.
INTERIM ACCOMMODATION	temporary place to stay while an employee is actively looking for permanent accommodation.
LAUNDRY	Means washing and ironing of clothes and bedding including dry cleaning.
PERSAL	Personnel Salary System
REASONABLE ACTUAL COSTS	Means the most reasonable costs at economical rate.
SUBSISTENCE AND TRAVEL COSTS	Means S&T allowance payment designed to reimburse an employee for reasonable living and transport expenses necessarily incurred by him or her whilst absent from his/her headquarters on departmental duty, over and above his or her normal living and transport expenses at his home.
TRANSFER	means an employee transfer from the National or Provincial government or any other provincial department in terms of the Public Service Act or Continuing Education and Training Act.

1. BACKGROUND AND INTRODUCTION

PREAMBLE

To provide measures and guidelines for the employer to meet, the actual resettlement costs incurred by an employee and his or her immediate family as a result of resettlement due to a transfer from one place to a new place.

Liabilities of the Employer in respect of resettlement costs is limited to authorized and necessary expenditure resulting from the most cost-effective arrangement. Additional expenditure, which results from personal preferences or arrangements made in own interests, would not be incurred by the Employer but by the relevant employee.

1.1 Policy Statement

The DHET/CET/Regional Office and TVET College appreciates that in order to achieve its strategic goals, it would need to provide an organised Transfer and Relocation Policy to set out guidelines on the process to be followed, when the services of an Employee is being transferred, promoted or relocated as a result of operational requirements.

1.2 Legislative Framework

- 1.2.1 Public Service Act, Proclamation 103, of 1994;
- 1.2.2 Public Finance Management Act, Act 1 of 1999;
- 1.2.3 Public Service Regulations 2016, as amended
- 1.2.4 PSCBC Resolution No. 3 of 1999; and
- 1.2.5 Basic Conditions of Employment Act 75 of 1997

2. POLICY PURPOSE, OBJECTIVES AND PRINCIPLES

2.1 Purpose

This Policy seeks to provide information relating to financial assistance available to Employees in the DHET/CET/Regional Office and TVET Colleges in the event of transfer or relocation.

2.2 Objectives

The objective of this Policy is to provide measures and guidelines for reasonable expenditure and cost necessarily incurred by the Department as a result of the transfer and relocation of an Employee to ensure smooth transition.

2.3 Principles

2.3.1 Fairness;

2.3.2 Professionalism;

2.3.3 Transparency; and

2.3.4 Equity.

3. Scope of Application

This Policy applies to all permanent and fixed-term contract DHET/CET/Regional Office and TVET College Employees who are being transferred in accordance with operational requirements of the DHET/CET/Regional Office and TVET College, and as a result are physically forced to relocate. The additional distance between their residence and new workplace via the shortest route is 100 km or more one way single trip due to being transferred to any new work location. This policy does not apply to fixed-term short contract, casual employees and interns.

4. POLICY PROVISIONS

4.1 Approval of Transfer

4.1.1 Approval of transfer shall be based on fairness and professionalism taking into account the following:

- (a) Transfer may be considered on the request of an Employee if there is a suitable vacancy at the location to which the Employee wished to be transferred.
- (b) Personal circumstances and preferences would be generally taken into account when finalising transfer decision. However, the departmental DHET/CET/Regional Office and TVET College requirements will take precedence.
- (c) Transfer requested on personal grounds would not be eligible for DHET/CET/Regional Office and TVET College benefits applicable on Transfer and Relocation Policy.
- (d) The transfer allowance will only be applicable if the distance between current and new location is 100 km or more.
- (e) The Employee shall agree in writing to repay the Employer's expenditure for relocation and/or resulting transfer accounts payed including transfer fees on purchase of a dwelling if he/she should leave the Public Service within a period of one year.

4.2 Travelling Expenses

4.2.1 The travelling expenses of an Employee and his/her household arising from the transfer to the new location may be paid as follows:

- (a) An Employee accompanied by his/her spouse or life partner may be paid by the DHET/CET/Regional Office and TVET College, for travelling expenses arising from one visit prior to the actual intended transfer, appointment and promotion.
- (b) The travelling expenses are limited to the most economical (return) travelling arrangement between old and new location agreed upon by both Employer and Employee.

- (c) Payment for subsistence expenses is restricted to a maximum of two days plus reasonable travelling time, with a payment of one night in a hotel.
- (d) Where DHET/CET/Regional Office and TVET College housing is provided at the place of work, the provisions for interim accommodation will not be applicable.
- (e) The reasonable travel time of an Employee being transferred should be regarded as official duty.
- (f) At the time of assumption of duty an Employee may claim travelling costs to the new place of work as per the approved state tariff according to his vehicle engine capacity for a single one way trip from his previous location to the new one, it is expected that the shortest possible, most economical, route should be followed between old and new place of work.
- (g) If an Employee lengthens his journey for own interest or uses other means of transport other than that which is approved i.e by air instead of bus, travel subsistence expenditure can be compensated up to the amount which would have been entitled in terms of the Policy only and the excess will be for his own account.
- (h) Where expenditure has to be paid in terms of this Policy, written application shall be made for authorisation by the delegated authority.

4.3 Interim Accommodation

- 4.3.1 If the Employee and his/her immediate family must rent interim furnished accommodation at their new place of work, the Employer shall meet reasonable actual costs. This is strictly connected with the immediate non-availability of suitable permanent accommodation or where problems are experienced with the transporting, unpacking or unloading of the Employee's personal effects.
- 4.3.2 The DHET/CET/Regional Office and TVET College can approve a period not exceeding two months for interim accommodation. As soon as permanent accommodation has been secured the Employee must vacate the interim accommodation and should not stay in the interim accommodation for the two full months if it is not necessary.
- 4.3.3 Interim accommodation costs are limited to a lodge/guest house, 3 star hotel/place of boarding/lodging with family or friends/flat/house costs, meals plus two non- alcoholic beverages per day, laundry and parking.

- 4.3.4 Supervisor/Line Managers should encourage and assist the Employee, where possible, to secure permanent accommodation as soon as possible. Extension of the above-mentioned period will only be approved in extreme cases.
- 4.3.5 In the event of a request for an extension of interim accommodation, it must be accompanied by a motivational approval from the delegated authority.
- 4.3.6 The approval for interim accommodation will be concluded between the DHET/CET/Regional Office and TVET College and the hotel or any establishment offering accommodation.
- 4.3.7 The DHET/CET/Regional Office and TVET College will pay the hotel and/or establishment directly. No funds will be paid to an Employee for the payment of the hotel account other than the above-mentioned. The DHET/CET/Regional Office and TVET College is not liable for any other costs/accounts/fees arising from services at the hotel and will not accept such contract in an instance where an Employee has accepted a tender/contract /service/on its behalf.
- 4.3.8 Telephone calls, alcoholic beverages, newspapers/faxes/magazines, deposits, gratuities, entertainment, room service, meals additional to two substantial meals per day and tray charges will not be paid out of DHET/CET/Regional Office and TVET College funds but will be the Employee's own responsibility.
- 4.3.9 Employees will be liable for expenses at the hotel or any other place of accommodation for family members or friends.
- 4.3.10 If an Employee chooses to stay in accommodation other than a hotel such as a rented apartment/house or with family/friends, the following measures will apply:
- (a) Employees can claim for a daily allowance or fixed State tariff Daily rate allowances payable are amended from time to time.
 - (b) Rent will be fully paid by the DHET/CET/Regional Office and TVET College, including breakfast and dinner plus two non-alcoholic beverages per day at the State tariff. In addition, laundry and parking may be claimed should an Employee decide to rent an apartment or house.
 - (c) Fixed daily subsistence allowance as directed by the DPSA with regard to the Subsistence and Travel allowances, which is amended annually, will be paid when staying with family/friends.
 - (d) Provision of receipts on the purchase of prepared meals must include the name of the business, description of meals, time and date. Those occupying rented accommodation with fitted kitchen facilities can submit a claim for the reasonable purchase of groceries on a daily basis.

- (e) Provision of Subsistence and Travel claim Z462 form, **(Annexure A)**, must be accompanied by all relevant receipt and documentary proof on a monthly basis.

4.4 Transport Expenses regarding removal of Household Goods

- 4.4.1 These expenses shall include reasonable actual costs of transport to the new permanent accommodation, storage, packing and unpacking inclusive of insurance cover.
- 4.4.2 The approval for the removal of furniture and personal effects will be concluded by the DHET/CET/Regional Office and TVET College in line with current National Treasury Tender on the transportation of cargo and furniture relocation services for the State. The DHET/CET/Regional Office and TVET College will directly pay the service provider not the Employee.

4.5 Storage of Household Goods

- 4.5.1 If an Employee wishes to store furniture and personal effects, the DHET/CET/Regional Office and TVET College may bear the costs up to a maximum of two months. The storage must be included on the original quotation with necessary risk insurance cover.
- 4.5.2 Storage at the old and new place of work is meant as an aid when the Employee really experiences problems in obtaining accommodation at his new place of work that satisfy the reasonable requirements of the family.
- 4.5.3 If there are no storage facilities at the old or new place of work, the personal effects can be transported at the DHET/CET/Regional Office and TVET College expense to the nearest appropriate place where storage facilities are available.
- 4.5.4 The expense of transporting personal effects from one place to another cannot be paid by the DHET/CET/Regional Office and TVET College, except when the moving thereof is unavoidable and/or brings savings to the DHET/CET/Regional Office and TVET College.

4.6 Transfer Fees connected with the purchase or Erection of a Dwelling

- 4.6.1 Transfer fees connected to the purchasing of a dwelling or building site and erection of a dwelling thereon are payable upon resettlement, only to an Employee who transfers from a Public Service to DHET/CET/Regional Office and TVET College and not to an Employee who is appointed from outside the Public Service, unemployed or a first time home buyer.
- 4.6.2 Transfer expenses, arising from the purchase of a dwelling or building site and the erection of a dwelling thereon, are payable upon resettlement. The expenses in this regard refer to the cost of conveyance of property and mortgage cost, (i.e registration bond fees, registration to Deeds Office and insurance certificate, transfer fees, transfer duty, and expenses arising from the drafting of a purchase contract and inspection fees).
- 4.6.3 In cases where the transfer fees are included in a mortgage loan, payment by the DHET/CET/Regional Office and TVET College will not be made to the Employee personally, but directly into his/her mortgage loan account.
- 4.6.4 The above is only payable if the employee purchases a home.
- 4.6.5 If the new location is within 12 months after the date of transfer.

4.7 Expenditure on new School Books, Uniforms and other related Costs

- 4.7.1 For each school child who must change school and who is a dependant of the Employee, the Employer will pay a once-off amount towards expenditure on school books, uniforms, sport outfits and other requirements for that particular year of joining the new school. This excludes children going to Grade 8.
- 4.7.2 On a quaterly basis, the DPSA will revise the amount for clothing and footwear in accordance with the Consumer Price Index.
- 4.7.3 If an Employee is transferring during the school year and has to incur accommodation costs because he/she cannot interrupt the schooling of his/her child, he/she may be compensated until the end of the school year in which he/she is transferred on the basis of reasonable actual expenses as stated (below in 4.7.4 and 4.7.5).
- 4.7.4 When an Employee's whole immediate family is left at his/her previous place of work, repayment of his/her reasonable actual accommodation expenses at his new place of work can be claimed.

- 4.7.5 Where an Employee's immediate family is divided repayment of the difference between the reasonable actual subsistence expenses and the reasonable actual expenses for board and lodging, irrespective of where the members of his immediate family find themselves shall be allowed.
- 4.7.6 Actual expenditure incurred may be claimed.
- 4.7.7 An Employee cannot claim for children registering for Grade 1 and Grade 8 except if it's a mid-year transfer, whereby proof will have to be submitted from the school at the old location that the particular child was attending.

4.8 Continued Payment of Housing Allowance

An allowance is given for a period of six months, while an Employee is in the process of selling his/her dwelling within that period. If an Employee owns two dwellings, he/she will receive housing allowance on one dwelling only.

4.9 Travelling Expenses originating from Children's Schooling

- 4.9.1 The most economical travelling expenses for a period not exceeding one school year in respect of each child who remains at the old place of work will be paid out of DHET/CET/Regional Office and TVET College funds.
- 4.9.2 The travelling expenses are limited to travelling to and from the new place of work at the beginning and end of school holidays and at the end of the school year.

4.10 Incidental Expenses

- 4.10.1 A single once-off amount will be paid by the DHET/CET/Regional Office and TVET College to meet incidental expenses arising from relocation, such as the registration of motor vehicle(s), number plates, installation of a telephone, connection of water and electricity supply, installation of domestic appliances, depreciation of personal possession and replacement of curtains.
- 4.10.2 An Employee who applies for incidental expenses will be regarded as being relocated. Interim accommodation will be discontinued with effect from the date of relocation.

- 4.10.3 If furnished accommodation is occupied permanently: an Employee may apply for a single amount equal to 25% of his basic monthly salary as at the date of relocation.
- 4.10.4 If unfurnished accommodation is occupied permanently, an Employee may apply for a single amount equal to 100% of his new basic monthly salary of the Employee, as at the date of relocation.

5. ENTITLEMENT

5.1 Entitlement upon Retirement

- 5.1.1 Only the removal of household goods and personal effects and storage costs will be paid by the DHET/CET/Regional Office and TVET College upon retirement. For this purpose three quotations from the DHET/College approved transport companies are required.
- 5.1.2 The above is only applicable for a period of twelve months after the last day of service. If the Employee does not relocate within the twelve month period, a request for extension should be motivated and sent to the Deputy Director-General/or his/her Delegated Authority Corporate Services at the DHET/CET/Regional Office and TVET College.
- 5.1.3 The above costs are only paid for relocation within the Republic of South Africa.

5.2 Entitlement upon appointment in the Public Service

- 5.2.1 The travelling expenses as well as the transport expenses, insurance costs and storage costs, for no longer than one month, in respect of removal of household goods and personal effects of a candidate who, on appointment, has to relocate, may be paid by the Department.
- 5.2.2 No accommodation expenses, incidental expenses, transfer fees for purchasing of a house or travel and school uniform expenses are payable in respect of a newly appointed Employee and his/her household.
- 5.2.3 The employee shall agree, in writing, to repay the employer's expenditure for relocation if he/she should leave the Public Service within a year.
- 5.2.4 No payments in respect of relocation are payable to employee(s).

5.3 Entitlement upon appointment from a Foreign Country

- 5.3.1 In cases where a person is appointed on a contract from foreign country, the travelling expenses of the person and his/her household and transport expenses and insurance costs of his/her personal effects may be paid. Storage of personal effects for a period of one month and subsequent delivery may be paid by the College, if residence cannot be occupied immediately.
- 5.3.2 In such cases, the person must be bound contractually in writing for not less than twelve months. In case of breach of contract by such person, a pro rata portion of the amount paid in respect of the resettlement expenses must be paid back by them.
- 5.3.3 No accommodation expenses, incidental expenses, transfer fees for purchasing of a house or travel and school uniform expenses are payable in respect of a newly appointed Employee and his household.
- 5.3.4 In case of an employee recruited from abroad, the employer will pay for resettlement and transport costs from/within the borders of South Africa only.
- 5.3.5 No further payments in respect of retirement are payable to the employee(s).

5.4 Entitlement when performing Parliamentary Sessional Duties

An Employee performing sessional duties may claim the travelling and subsistence expenses of his household at the beginning and end of a Parliamentary Session and the conveyance to and from Cape Town of essential personal effects of his/her household.

5.5 Privileges of new appointees

- 5.51 The employer may pay the reasonable actual costs of relocation of a newly appointed public servant, recruited within the public service or private sector to her or his place of work. This expenditure may include reasonable actual costs of (i) Travel by employee and her or his immediate family, and (ii) Transport, packing, unpacking, insurance and one month's storage for personal and household goods.
- 5.52 If the employee cannot move into permanently rented or bought accommodation immediately upon transfer, the employee and his or

her immediate family shall be allowed to utilize the most reasonable, appropriate furnished interim accommodation at Employer's cost for a period of one month. The cost of accommodation shall include breakfast and dinner and two non-alcoholic beverages per day. Laundry and packing will also be paid for by the Department.

5.5.3 The employee shall agree in writing to repay the employer's expenditure for relocation if she or he should leave the public service a year or less.

5.5.4 If an employee is recruited from abroad, her or his Executive Authority may provide a once-off payment equal to the employee's monthly salary on the date of assumption of duty before he/she received her or his first salary payment.

6. POLICY ADMINISTRATION, MONITORING AND EVALUATION

6.1 This Policy shall be **effectively and efficiently administered**, monitored and evaluated by the directorate responsible for Transfer and Relocation in the Department.

6.2 PROCEDURES FOR IMPLEMENTATION

This policy will be implemented in line with the provisions of the Public Service Act, Proclamation 103, of 1994 Public Service Regulations of 2016, Basic Conditions of Employment Act 75 of 1997, Public Finance Management Act 1 of , PSCBC Resolution 3 of 1999 and Minister of DPSA revised circular on allowances.

7. POLICY REVIEW

This Policy will be reviewed every three (3) years or as and when a need arises.

8. DISPUTE RESOLUTION

Any dispute arising out of the interpretation and/or application of this policy shall be dealt following applicable legislations and policies.

9. POLICY APPROVAL SIGNATURE

Signed at Pretoria on this 30th day of March 20 22



Dr Nkosinathi Sishi

Director-General: Department of Higher Education and Training