

# PROTEA HEIGHTS ACADEMY

# PROTEAHOOGTE AKADEMIE

## FINANCE POLICY



### POLICY REGISTER DETAILS

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COMPILED BY	A Burger
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The purpose of this policy is to describe the process for the management of funds at Protea Heights Academy. The policy is applicable to the management of all funds of all stakeholders at Protea Heights Academy.

## **1. INTRODUCTION**

- The School Governing Body (SGB) will adhere to all the stipulations of the South African Schools Act, Act 84 of 1996 (SASA). Western Cape Provincial Government legislation, as well as all relevant regulations issued under it, in respect of the management of all finances at the school.
- This Financial Policy has as its purpose the practical implementation of the South African Schools Act, Act 84 of 1996 (SASA), as amended, the Western Cape Provincial Government legislation, the Public Finance Management Act, Act 1 of 1999 and the Basic Financial Manual for Schools, 2nd edition, 2006 for the orderly handling of all finances and school property.

## **2. TERMINOLOGY AND RESPONSIBILITY**

In this document certain terms and areas of responsibility are used which are not official departmental delegations or positions. The school may substitute its own terms for these, but it is important that such terms be clearly defined and/or understood.

- 2.1 Principal is the official, departmentally-appointed senior educator whose role it is to lead and manage the school under the authority of the provincial Head of Department for Education (HOD) and who represents the HOD in the SGB.
- 2.2 School Finance Officer (SFO) is appointed by the SGB and has responsibility for managing the financial operations of the school in terms of the school finance policy (SFP). This person may be called by other titles such as Bursar, Financial Director, Finance Manager. He or she supervises the staff appointed to perform other financial administration tasks such as fees clerk, salaries clerk, debtors' clerk, or cashier.
- 2.3 Treasurer refers to a member of the SGB elected to oversee the financial affairs of the school. Such person is commonly chairperson of the Finance Committee (Fincom) and is often referred to by that title rather than Treasurer.

### **3. ACCOUNTING POLICIES**

- 3.1 The financial statements are prepared on the historical cost basis, in accordance with generally accepted accounting practice.
- 3.2 The principal accounting policies adopted by the school, which are consistent with those of the prior year, are as follows:
- 3.2.1 School fees are paid into the current account.
- 3.2.2 Usage of all school fund money must be in terms of the budget approved annually at the annual budget meeting.

### **4. THE FINANCE COMMITTEE**

- 4.1 The School Governing Body (SGB) annually appoints and approves the members of the Finance Committee. The functions of the Finance Committee are:
- To assist the school in managing the finances
  - To ensure that the school finances are managed in line with the approved budget
  - To act in an advisory capacity to the SGB
  - To ensure that the financial records are kept up to date
  - Assist with the process of drawing up the annual budget
- 4.2 Finance Committee may consist of the following members:
- The treasurer of the SGB
  - The Principal
  - SFO
  - Educators
  - Parents
  - Co-opted members
- 4.3 Mandate of the Finance Committee:
- The SGB manages school funds within the statutory framework provided, and in accordance with accepted accounting principles and practices.
  - To annually compile a draft budget before the end of August for the following year and to present this draft budget to the SGB for discussion and approval.
  - To apply sound financial control over income and expenditure in line with the budget.
  - To request the SGB for permission when certain adjustments within the budget needs to be made.

- To request the SGB for authorization to cover unexpected essential expenditure.
- To consider and recommend fundraising events to the SGB.
- To monitor the activities of the Tuck Shop and to ensure that the contract stipulations are carried out.
- To meet at least once per month. Minutes of all meetings should be kept and submitted to the SGB at its next meeting. Agenda must be available 5 (five) days before the meeting. Points for discussion must be submitted 7 (seven) days before the meeting.
- To monitor the record-keeping of all funds received and paid by the school.
- To monitor the Asset Register of the school.
- To ensure that all financial submissions as required by the WCED are submitted timeously.
- To ensure that the annual financial statements have been compiled for audit purposes.
- To ensure annually, before 31 March, that the school's books have been submitted to an auditor for the annual audit and to present the audit report to the SGB for approval.
- Employing staff, if required.
- Paying extra remuneration (Section 38A) to state-paid staff only with prior approval of the HOD.
- Maintaining and improving the school property (SASA section 21 functions).
- Purchasing learning materials (SASA section 21 functions).
- Paying for services to the school (SASA section 21 functions).

4.4 The Inventory Control & LTSM Committee is appointed by the SGB to maintain a register of assets and inventory and to monitor the control of assets and inventory in terms of the SFP.

## **5. THE BURSAR/ SCHOOL FINANCE OFFICER**

5.1 The SFO is authorised, in writing, by the SGB to perform the daily financial operations in terms of this SFP and is accountable to the SGB through the Fincom. The duties of the Bursar/Finance Officer are as follows:

- Issue and receive payment requisition forms.
- Receives invoices for all purchases.
- Load payments after the necessary forms have been completed and approved by the Principal or delegated person.
- Obtain the approved signatures on the payments.
- Receive and process specified travelling claims for payment.

- Manage all budget items and inform the Principal of any items exceeding the allocated amounts to any budget item.
- Process the monthly debit order system.
- Administer the receipting and payment processes of all projects or fundraising.
- Answer queries from Chairpersons of Governing Bodies on budget items.
- Take care of all face-value forms e.g. receipts and donation receipts.
- Administer salaries of staff who are on the SGB payroll.
- Calculate and deduct taxes and levies from salaries of staff who are on the SGB payroll and pay it over to the South African Revenue Services (SARS) or relevant authority, i.e. UIF, Workmen's Compensation.
- Compile a monthly income and expenditure report and present it to the Finance Committee for their monthly meeting.
- Prepare documentation for the Finance Committee meetings.
- Reconcile the bank statements with the Cash Books.
- Allocate all purchases under approved budget items.
- File and ensure the safekeeping of all financial statements.
- Prepare the financial records required by the auditor.
- Implement the financial system ordered by the SGB.
- Keep complete records of all income and expenditure.
- Report any financial irregularities to the SGB.
- Receive all the money that the learners have paid in.
- Issue receipts for all money paid in.
- Reconcile all money according to the receipts that were issued.
- Write up the deposits in the deposit book.
- Print monthly statements for outstanding school fees.
- Administer all queries from parents about school fees.
- Exercise credit control and collection of all outstanding school fees in conjunction with the debt collectors.
- Compile and submit the list of all bad debts for the debt collectors and a copy to be sent to the Principal.
- Provide the SGB with composite monthly school fee statements.
- Keep record of all subsidy application and subsidies received.
- Assist the Finance Committee Chair and the Principal with the administration of Financial Aid/ Exemptions.

## **6. THE CURRENT BANK ACCOUNT**

- 6.1 A current bank account has been opened in the name of Protea Heights Academy at ABSA Bank, Brackenfell – Account No. 408 425 7700
- 6.2 The SGB has approved the following five signatories:
- Ms. A Coetzer – Principal
  - Mr. G Morris – SGB Chairperson
  - Mr R Anthony – SGB Treasurer
  - Ms A Burger (Wentzel) – Finance officer
- 6.3 Any two of the approved signatories may authorise payments on behalf of the school.
- 6.4 The signatories/authorised EFT payment releasing operators of the cheque account may under no circumstances release payments prior to being invoiced.
- 6.5 The SGB shall not enter into a hire purchase agreement before the Regional office of the Education Department has been consulted.
- 6.6 All school funds will be deposited in the current account and no other account. The bank account must be reconciled on a month basis. A copy of the monthly bank statement must be presented at the Finance committee.

## **7. INVESTMENT ACCOUNT**

- 7.1 Surplus funds in the current account may be invested in an investment account with the approval of the SGB.
- 7.2 Permission from the SGB must be obtained before surplus funds can be invested.
- motivational report as to the need for an investment.
  - the nature of the investment, e.g. shares, call account, fixed deposit, hedge funds and unit trusts.
  - details of existing investments.
  - a copy of the school's bank statement of the current account.
- 7.3 The investment must be in the name of the school and it must be linked to the main school account if held at the same bank.
- 7.4 All transfers into or out of the investment fund must be channelled via the main account of the school.

- 7.5 Under no circumstances must funds be transferred directly into the investment account. E.g., fund raising income is first deposited into the current account and then transferred into an investment account.
- 7.6 No payments may be effected from the investment account. Investment accounts may not be held off outside South Africa.
- 7.7 The account must be reconciled on a monthly basis and a copy of the bank statement must be presented to the Finance committee.

## **8. INTERNET BANKING**

- 8.1 Internet payments are done twice weekly on Tuesday and Thursdays.
- 8.2 All payments are to be released by two releasing operators.
- 8.3 The releasing operators are the same as the signatories on the current account.
- 8.4 The releasing operators will sign the documentation relating to the payment being released.
- 8.5 The Members of the finance committee that has access to Internet banking are as follow:
- Principal Loading/Releasing rights
  - Financial officer Loading/Releasing rights
  - Bursar Viewing rights
- 8.6 The Financial manager / Principal / Bookkeeper must monitor the use of the facility on an on-going basis.

## **9. DEBIT ORDERS**

- 9.1 Debit orders are to be completed annually by parents wishing to pay via debit order.
- 9.2 Debit orders will be run on the last working day of the month.
- 9.3 Debit orders runs will be from 28 February to 30 November.
- 9.4 Returned debit orders will be charged a R50 administration fee.

## **10. ACCOUNTING SYSTEM**

- 10.1 The accounting records of the school will be done on SAGE PASTEL.
- 10.2 The Bursar/SFO will be responsible for the capturing of all information on SAGE PASTEL.



## **11. RECEIPTS**

- 11.1 All receipt books purchased must be entered in the Receipt-Book Register.
- 11.2 The Bursar/Financial Officer will be responsible for the Receipt-Book Register.
- 11.3 All receipts must be completed in ink (preferable black/blue).
- 11.4 Carbon paper must be used when receipts are issued.
- 11.5 In the event of an error, the word "cancelled" must be written on the receipt. The cancelled receipt must remain in the receipt book.
- 11.6 When a receipt book is full it must be returned to the Bursar/Financial Officer. All used receipt books will be kept in the safe for audit purposes.
- 11.7 Receipts must be completed in duplicate (black or blue ballpoint).
- 11.8 Receipts must be dated and completed in full.
- 11.9 All copies must be clearly legible.
- 11.10 Only one receipt per payment is permitted.
- 11.11 No alterations may be made on the receipt. Should this be necessary, the receipt must be cancelled, and must remain in the receipt book.
- 11.12 Receipts must be issued for all money collected when it is received and the following information be recorded on the receipt:
  - Serial number of receipt. Each receipt has a different number.
  - Date on which the money was received.
  - Name of person who paid the money.
  - Amount written in words.
  - Amount in figures
  - Reason for the receipt of the money.
  - Signature of CASHIER who received the money on behalf of the school.

## **12. PROCEDURES TO FOLLOW WHEN RECEIVING MONEY**

- 12.1 All school fee monies received by the school will be recorded individually and immediately through the issue of a receipt in duplicate and entered in the cash book. The original receipt, completed in accordance with the requirements of this policy, should be handed to the payer of the cash money.
- 12.2 Notes with missing pieces, colour dye or writing on it will not be accepted.

- 12.3 All monies received by the school should be deposited in an account in the name of the school at a registered bank.
- 12.4 Immediately after receipting, the money must be placed in the safe and deposited as soon as possible to meet insurance cover requirements.
- 12.5 Cash is not accepted for any function/ activity/ fundraiser at the school.
- 12.6 Parents must make use of the Karri App or EFT to make payments to the school.
- 12.7 The only cash accepted is for single, odd payments e.g. Name badges, lost textbooks and Raffle forms.
- 12.8 The bursar is responsible for daily cash handling.
- 12.9 The bursar is responsible to record all transactions.
- 12.10 The SFO reconciles the bursar's receipts with the cash amount.
- 12.11 All money received must be handed to the SFO at the end of the week to reconcile. The SFO & depositor will sign off that the amount receipted matches the amount of cash.
- 12.12 Any cash received must be kept in the main safe inside a coded safe box once received.
- 12.13 No staff members may use cash received to reimburse individuals or themselves for costs incurred. For example, cash paid for tickets for a concert may not be used to refund the tuck-shop for the cost of goods purchased for sale at the concert.

### **13. DEPOSITING OF MONEY**

- 13.1 All money received must be receipted and kept in the safe prior to depositing.
- 13.2 No money may be spent before being banked.
- 13.3 The deposit slip total must balance to the total of the receipts being banked.
- 13.4 The SFO and person responsible for depositing the money, must ensure that the deposit slips reflect the money to be banked.
- 13.5 If money collected by staff is not paid over to the SFO promptly and said money is lost, then such staff member will be held responsible for the re-imburement of the money and the necessary disciplinary steps taken against the staff member.

## **14. SPONSORS / DONATIONS / RAFFLES**

- 14.1 Sponsors may be sought by either learners or educators.
- 14.2 The letter requesting sponsorships must bear the signature of the Principal or the SGB Chairperson.
- 14.3 All donations are regarded as school money.
- 14.4 All donations in cash or kind over R1 000 must be recorded in the Donations Register.
- 14.5 The School is a registered PBO and may generate a Section 18A receipt for donations made to the school
- 14.6 All sponsorships must be used to the sponsors' specifications.
- 14.7 The SGB must be informed of all sponsorships received by the school.
- 14.8 Raffles may only take place on approval of the Principal.
- 14.9 Raffle forms must bear the school logo, be stamped and numbered.
- 14.10 All raffle forms are to be returned and must correspond with the monies handed in.
- 14.11 Refer to Policy 24: Donations for further detail.

## **15. PAYMENT OF SALARIES (SGB POSTS)**

- 15.1 Salaries are paid on the 25th day of the month. Unless an individual contract stated otherwise.
- 15.2 All the required deductions, e.g. PAYE/UIF, must be made.
- 15.3 No employee may be remunerated unless there is a valid employment contract in place.
- 15.4 If the salary has been adjusted on an annual basis, a copy of the current approved salary adjustment letter must be filed with the employment contract to authorise the adjusted payment.
- 15.5 A salary advice slip must be prepared for all payments.
- 15.6 No loans may be taken against the salary.
- 15.7 Bonuses will be paid according to the individual contracts of employment.
- 15.8 An IRP5 form must be provided to SGB employees for tax purposes.

- 15.9 The normal authorisation process for payment applies. Extra care must be taken to check that only bona fide employees appear on the salary schedule.
- 15.10 No Section 38A additional remuneration may be paid to state-employed staff unless the application for payment has been approved by the HOD and the principal has authorised the payment and confirmed that the extra work for which the payment was claimed has been completed.
- 15.11 Additional casual cleaning staff may be employed as needed at R250 per day.
- 15.12 Additional administrative staff may be employed and paid up to a maximum of R250 per day.
- 15.13 Substitute educators will be paid up to a maximum of R500 per day.
- 15.14 External Invigilators will be paid R60 per hour. The External Chief/Mentor Invigilator will be paid R80 per hour or an equivalent remuneration to WCED appointed invigilators.

## **16. SCHOOL FEES**

- 16.1 Parents should be notified of the payment structure after the annual budget meeting.
- 16.2 Parents sign a commitment form that serves as acknowledgement of responsibility regarding school fee payment.
- 16.3 School fee Invoices must be prepared and sent out at the start of the financial year.
- 16.4 Statements must reflect full payment for the year (and reflect the full fee as determined by parents at the budget meeting).
- 16.5 Further statements must be forwarded on a monthly basis.
- 16.6 School fees are determined annually once the budget has been approved by the parents.
- 16.7 The payment of school fees is compulsory for all learners according to legislation.
- 16.8 Parents whose children are admitted to the school during the year are responsible for the proportionate payment of school fees for the remainder of the year.

- 16.9 School fees can be paid in a lump sum at the beginning of the year, which will entitle parents to an early settlement discount; or in 10 payments, as set out in the official fees notification letter.
- 16.10 Applications for school fee exemption will be dealt with strictly in terms of the provision of the SASA and any applicable guidelines.
- 16.11 Monthly statements will be sent to parents who owe fees.
- 16.12 Early settlement discount of the full school fee before 31 January is R2 000 and 28 February of that year is R1 000.
- 16.13 School fees must be paid by EFT directly into PHA's bank account.
- 16.14 All monies handed in will first be allocated to school fees, proportionally to be paid up, and only then to other items, such as tours, dances, etc. All items not within the curriculum are listed as “extras”.

## **17. EXEMPTIONS**

Management of exemptions:

- 17.1 Parents are liable for full payment unless they qualify for exemption.
- 17.2 Exemptions may be partial or conditional.
- 17.3 The budget makes provision for exemptions to be granted.
- 17.4 Application for exemption forms must be collected from the school and signed for.
- 17.5 The Finance office assigns a number to each application issued and tracks its progress from receipt until the parents are notified of the decision.
- 17.6 Completed application forms are processed by the Exemptions Committee.
- 17.7 The Exemptions Committee should comprise of the Finance Clerk, Bursar and SFO.
- 17.8 Applications contain sensitive information which must remain confidential.
- 17.9 The school must assist parents, where necessary, to complete application forms.
- 17.10 All applicants must be interviewed by a member of the Exemptions Committee.
- 17.11 All applications must be processed within 30 days of receipt of the application.

- 17.12 Incomplete applications must be returned immediately, and parents must be assisted to complete them.
- 17.13 Verification of information can be requested.
- 17.14 The outcome of the application, and reasons for the decision, must be communicated to the relevant parents within 7 days of a decision being made.
- 17.15 A dissatisfied applicant may appeal. The Exemptions Committee is required to communicate the outcome within 7 days.
- 17.16 The applicant may submit an appeal to the MEC of the province.
- 17.17 Exemptions granted must be reported to SGB for noting.
- 17.18 The auditor must verify the Exemption Return as soon as possible after exemptions have been finalised for the financial year and submit it to the SGB for adoption and submission to the relevant PED (Provincial Department of Education).

## **18. COLLECTION OF OUTSTANDING SCHOOL FEES**

- 18.1 Parents who are outstanding with their school fees will receive a written reminder and all attempts will be made to collect the outstanding fees.
- 18.2 Parents who received a written reminder, and who have made no effort to settle the outstanding fees or made alternative arrangements for payment, will be handed over for debt collection according to the procedure as set out in the SASA.
- 18.3 Parents will be held accountable for any additional costs incurred.

## **19. RE-IMBURSEMENT OF SCHOOL FEES**

- 19.1 Learners whose parents have paid the annual school fees in advance, but leave the school will be entitled to a pro rata re-imbusement.
- 19.2 Re-imburements can only be arranged once all textbooks have been returned to the school.

## **20. ACTIVITIES CONSIDERED AS OUTSIDE THE CORE CURRICULUM**

- 20.1 These activities are not considered as part of the core curriculum and they incur an extra cost outside of the school fees for the year.
- 20.2 Any learner who has school fees in arrears, parents must first meet with the financial clerk to make necessary arrangements before the learner can attend these activities (unless the school fees are up to date at the time of the activity).
- Matric dance
  - Grade social functions
  - Tours/Excursions
  - Any extra activity that is not part of the core curriculum and incurs an extra cost greater than R100
- 20.3 Extramural activities that are not approved in terms of the core curriculum offered at the school (e.g. sport activities not offered at the school).
- 20.4 Any learner that is receiving Financial Assistance from the school may not pay for tours, unless the school is able to secure a sponsor for that learner.

## **21. PRIVATE PURCHASES**

- 21.1 No private purchases may be made on any of the school's accounts.

## **22. PAYMENT OF TRAVELLING AND SUBSISTENCE ALLOWANCES**

- 22.1 Costs incurred for approved travel for school business purposes may be reimbursed.
- 22.2 Travel claims must be made on the prescribed form and authorised by the principal or SFO before payment.
- 22.3 No transport claims will be paid for social functions.
- 22.4 Claims are submitted quarterly at the end of the term.
- 22.5 Documentary proof giving details of the reason for the trip must be submitted with the claim, e.g. invitation to workshop, fixtures for sport matches etc.
- 22.6 Employees travel claims will be reimbursed at the applicable AA rate relevant on the date of submission.

## **23. BUDGET**

- 23.1 All stakeholders (portfolio/activity manager) must give inputs w.r.t. to their requirements to the Chairperson of the Finance Committee.
- 23.2 The Finance Committee will then prepare a draft budget.
- 23.3 The school may not budget for a deficit.
- 23.4 The draft budget will be submitted to the SGB for approval.
- 23.5 Parents will be notified in writing 30 days before the budget meeting takes place.
- 23.6 The proposed budget is made available to parents 14 days before the meeting for scrutiny.
- 23.7 The financial statements of the previous financial year and proposed budget are presented at the AGM.
- 23.8 All income and expenditure will be discussed by the Chairperson/Treasurer of the SGB at the budget meeting.
- 23.9 The budget will be approved by the parents present and voting.
- 23.10 The decisions taken at the budget meeting will be binding on all parents.
- 23.11 All parents are notified in writing of the decisions/resolutions taken at the budget meeting.
- 23.12 The budget must be submitted to the WCED by 1 December each year.

## **24. MANAGEMENT OF THE BUDGET**

- 24.1 Each portfolio/activity manager must monitor the funds allocated to his/her section.
- 24.2 A requisition form must be submitted to the Bursar/SFO BEFORE spending can take place. The form must be signed by the educator, portfolio head and the Principal.
- 24.3 Spending is determined by the amount of money received by the school.
- 24.4 The Principal must be informed of expenditure before it is incurred.
- 24.5 The Finance Committee is responsible for submitting a report to the SGB at every meeting regarding the state of the financial situation at the school.
- 24.6 Changes in the budget must be discussed and approved at a SGB meeting before any expenditure is made and minutes must be kept.



## 25. PROCUREMENT PROCEDURES

25.1 The person wanting to make a purchase must approach the portfolio head/ manager to determine whether there are funds available for such a purchase. Personal interests in any supplier or connection to any supplier must be disclosed and first approved by management before that supplier may be used.

### 25.2 AUTHORIZATION

The following approval levels are allowed:

The Principal have the following signing/ release powers

- a) All budgeted operating costs up to R30 000 (only the invoice and approval from the principal is required, no quote needed).
- b) All budgeted capital expenditure up to R30 000 (only the invoice and approval from the principal is required).
- c) Non-budgeted expenditure up to R5 000 (Principal only).
- d) Non-budgeted expenditures over R5 000 requires the prior approval of the Chairman of the Finance Committee and one of the following persons.
  - Chairman of SGB
  - Vice Chairman of SGB
- e) Confirmation of budgeted amounts above the limit of R30 000 must advance as followed:
  - R30 001 – R40 000: 2 quotes required and the SGB Financial Committee must approve the purchase
  - R40 001  $\geq$ : 3 quotes required and the SGB must approve the purchase
- f) Tenders must be called for in the case of all non-routine expenditure, including capital expenditure. The tender procedures to be adopted are as follows:
- g) Tenders / quotes must be obtained, in writing from at least three independent suppliers for items exceeding R100 000.

Tenders / quotes must be considered at a meeting of the Finance Meeting and SGB meeting.

## 26. INVENTORIES / STOCKTAKING

- 26.1 The school (SGB) is required to undertake the following:
- 26.2 Appoint an individual stock-controller to keep separate inventory registers of all non-consumable stock items per portfolio (e.g. subject; textbooks; equipment).
- 26.3 Appoint an Inventory Committee, with a chairperson who takes overall responsibility for inventories.
- 26.4 Appoint members to Disposal Committee which is tasked with the reconciliation of inventories and the disposal or writing off of damaged, lost or redundant assets.
- 26.5 An inventory must be kept for all the assets of the school.
- 26.6 Each subject area head or portfolio head must keep an inventory of subject related equipment. This must be submitted by the end of March each year to the stock control officer.
- 26.7 Sport equipment:
- Foreman – all tools, equipment, cleaning material, etc.
  - Textbook educator – all textbooks
  - Subject head – LTSM in their area of control
  - Head of Physical and Life Sciences – all laboratory equipment and supplies
  - Secretary – all stationery
  - ICT coordinator – all ICT equipment, including software licences
- 26.8 The stock control officer must control all inventories at least once a year.
- 26.9 The stock control officer must check whether new purchases were recorded in the inventory. The complete stock list must be submitted to the Principal at the end of April each year.
- 26.10 The stock control officer must compile a list of possible write-offs annually and present this list to the Disposal Board.
- 26.11 The Disposal Board must submit a request to the governing body for approval.
- 26.12 Once the write-offs have been approved, the stock control officer must ensure that the inventories are adjusted accordingly.

## **27. DISPOSAL BOARD/ COMMITTEE**

- 27.1 The Disposal Board will consist of the following members:
- A member of the SGB, who will act as Chairperson;
  - The Principal;
  - Members of staff in whose area equipment will be disposed of;
  - The stock control officer
- 27.2 The Disposal Board must ensure that surplus assets are shared and unused assets moved to a place where there is a need (other institutions).
- 27.3 Present a report on the result of the Disposal Committee meeting to the SGB annually at the beginning of each school term such report to include:
- a list of discrepancies between the stock-taking figure and previous records
  - a list of excess stock.
  - a list of unserviceable items.
  - statistics and reports pertaining to damage, breakdowns, burglaries, theft, fire, vandalism and other causes of loss.
  - Any relevant recommendations to the SGB.
- 27.4 The Disposal Board is responsible for establishing the price and negotiates the disposal with other institutions.
- 27.5 Once permission has been obtained from the SGB, the Disposal Board must ensure the removal of the asset from the institution and update the Asset Register.
- 27.6 The name of the individual/institution receiving the asset must be recorded, as well as the selling price.
- 27.7 All funds received must be banked.

## **28. LETTING OF ASSETS**

- 28.1 Hiring charges are determined annually.
- 28.2 Amounts are payable in advance.
- 28.3 A deposit for all possible damages will be requested.
- 28.4 The person who hires the facilities must pay a lock up fee, which will be paid over to the staff member responsible for locking up via the payroll.
- 28.5 The school must be indemnified from any claims.

## **29. SUBMISSION OF FINANCIAL STATEMENTS**

- 29.1 The Bursar/Financial Officer is responsible for submitting all the required information to the auditors by 31 March each year.
- 29.2 The SGB must submit the signed, audited Financial Statements to the WCED by 30 June each year.

## **30. TOURS – OVERSEAS AND LOCAL, AND OTHER ACTIVITIES OUTSIDE THE CURRICULUM**

- 30.1 A detailed budget for proposed tours must be submitted to the Principal for approval.
- 30.2 Tour costs must be fully covered by the monies raised.
- 30.3 Learners may only participate in a tour or other activities outside the curriculum that requires payment if their school fees are up to date proportionally and they are not receiving financial assistance from the school. Outside the curriculum activities include, but are not limited to, the following:
- Matric dance, Grade socials, tours (overseas and local), any outside/extra activity where the cost is greater than R100.
- 30.4 No monies may be paid for tour expenses to outside vendors until an equivalent amount has been raised.
- 30.5 No air tickets/travel arrangements are to be booked for individual persons until said individual has paid enough to cover the cost of the air ticket/travel arrangements.
- 30.6 Costs of staff members accompanying the group are to be included in the tour price.
- 30.7 Cancellation of tours – all monies (less admin fees charged by the tour operators) will be refunded to parents, except monies raised through fundraising, which will remain in the tour kitty for use by that particular sporting code/group.
- 30.8 No daily allowances will be paid to staff members accompanying the group.
- 30.9 A 5% tour levy (up to a maximum of R500) must be added to all overnight tours.

## 31. TEXTBOOKS

31.1 The textbook controller is the SFO.

31.2 The core textbooks, provided by the WCED, are included in the school fees and are provided to every learner. Any additional study guides, textbooks or workbooks (not provided by the WCED) will be paid for by the parents.

31.3 Procurement of textbooks:

- The textbook controller is responsible for the procurement of all textbooks.
- Textbooks are purchased as the need arises.
- Teachers submit requests for textbooks to the textbook controller.
- Textbooks are bought from preferred suppliers, as per the WCED list.

31.4 Issue of textbooks:

- Textbooks are issued by LTSM committee at the beginning of the year. The committee follow the instructions of the Head of LTSM.
- The LTSM committee record the summary of textbooks issued to each learner.
- Teachers receive a record of the textbooks issued to individual learners.
- Learners sign Annexure A to confirm receipt of the textbooks.

31.5 Return of textbooks:

- Textbooks are returned to the class teacher at the end of the year after the final exam for that subject has been completed.
- The LTSM records the return on Annexure A.
- Learners who have lost a textbook are liable for the replacement cost.
- The replacement cost is obtained from the textbook controller and the amount is then paid in to the school's bank account.

31.6 Obsolete/Damaged textbooks:

- Textbooks that are no longer used are donated to needy schools.
- Damaged textbooks are sent to recycling and replaced by the textbook controller.

### 32. APPROVAL

This Finance policy was approved and adopted by the Protea Heights Academy Governing Body on 20/09/2022 (date).

**SIGNED:**

CHAIRPERSON:



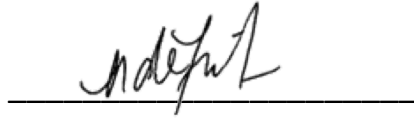
DATE: 20 September 2022

PRINCIPAL:



DATE: 20 September 2022

SECRETARY:



DATE: 20 September 2022



PROTEAHOOGTE AKADEMIE

**PHA**

PROTEA HEIGHTS ACADEMY

# EDUCATOR/ SUBSTITUTE CLAIM FORM

MATHEMATICS AND SCIENCE FOCUS



WISKUNDE EN WETENSKAP FOKUS



**EDUCATOR SUBSTITUTE CLAIM FORM:**

Name & Surname: \_\_\_\_\_

ID: \_\_\_\_\_ (attach copy of ID)

Date	Time in	Time out	Sign

**Principal:**

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Sign: \_\_\_\_\_

**FINANCE OFFICE:**

Remuneration calculation:	
Total Amount :	
Name:	
Sign:	
Date:	







PROTEAHOOGTE AKADEMIE

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## TRAVEL CLAIM FORM

MATHEMATICS AND SCIENCE FOCUS



WISKUNDE EN WETENSKAP FOKUS



PROTEAHOOGTE AKADEMIE

**PHA**

PROTEA HEIGHTS ACADEMY

## TRAVEL CLAIM

<b>NAME &amp; SURNAME</b>	
<b>TERM: 1 2 3 4</b>	
<b>Dates:</b>	

**HOME ADDRESS:**

---

**DISTANCE FROM HOME TO PHA:** \_\_\_\_\_ **km**

**REGISTRATION OF VEHICLE:** \_\_\_\_\_

### BANK DETAILS:

<b>BANK NAME</b>	
<b>BRANCH NAME</b>	
<b>BRANCH CODE</b>	
<b>ACCOUNT NUMBER</b>	
<b>TYPE OF ACCOUNT (SAVINGS/CHEQUE/TRANSMISSION...)</b>	

### General Information

The following may be claimed

- Travelling with your own vehicle for extramural activities where you are on duty (sport, culture, pastoral).
- Travelling to MEED or other venue for training where the school has NOT paid for the training.
- When you go home after school and then return for a meeting such as PTA, parent meetings

You cannot claim for travel when you come to school to do school related administration and you are not on official duty. If you are unsure, please ask.

**NO LATE CLAIMS WILL BE PROCESSED and the CLAIM WILL BE FORFEITED.**



MATHEMATICS AND SCIENCE FOCUS

WISKUNDE EN WETENSKAP FOKUS



PROTEAHOOGTE AKADEMIE

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DATE	REASON FOR TRAVEL	DESTINATION	DISTANCE (km)
<b>TOTAL</b>			
<b>CLAIM = _____ X R _____</b>			<b>R _____</b>

I, (FULL NAME) \_\_\_\_\_

DECLARE THAT THE ABOVE CLAIMS ARE ALL MADE WHEN ON OFFICIAL SCHOOL BUSINESS, USING MY PRIVATE VEHICLE AND THAT ALL DISTANCES CLAIMED ARE CORRECT TO MY BEST KNOWLEDGE.

<b>SIGNED</b>	
<b>DATE:</b>	



MATHEMATICS AND SCIENCE FOCUS

WISKUNDE EN WETENSKAP FOKUS



PROTEAHOOGTE AKADEMIE  
**PHA**  
PROTEA HEIGHTS ACADEMY

# ANNEXURE A: TEXTBOOK FORM





**TEXTBOOKS/HANDBOEKE  
 GRADE 8**

<b>NAME/NAAM:</b> _____		
<b>CLASS/KLAS: 8</b> _____	<b>Book issued/ Boek uitgereik</b>	<b>Book condition/ Toestand van boek</b>
<b>ENGLISH HL</b>		
Oxford Learner Book		
Oxford Literature Anthology	<b>X</b>	
<b>ENGLISH FAL</b>		
English Today Learner Book		
English Today Reader		
The Whistlers		
<b>AFRIKAANS HL</b>		
Platinum (leerderboek)		
Platinum (leesboek)	<b>X</b>	
Thomas @moord	<b>X</b>	
<b>AFRIKAANS FAL</b>		
Afrikaans Sonder Grense (leerderboek)		
Afrikaans Sonder Grense (leesboek)	<b>X</b>	
Perfek	<b>X</b>	
<b>GENERAL/ ALGEMEEN</b>		
Maths/Wisk (X-factor)		
Natural Science/ Natuurwetenskap		
Social Science/ Socialewetenskap		
EMS/EBW		
LO		





The following textbooks have been issued. The textbooks must be returned in the condition that is recorded on this form. All textbooks must be covered and their safekeeping is the responsibility of the learner.

Please check the condition stated in the textbook and specify on the form above. Any textbook that is lost or damaged must be paid for by the parent. A learner will not be issued with textbooks for the following year if all the textbooks on this list are not returned or paid for (if damaged or lost). If you have any problems/queries with the above mentioned please contact Mrs. A Burger @ [aburger@phahs.org.za](mailto:aburger@phahs.org.za), Ms L. Koenze [lkoenze@phahs.org.za](mailto:lkoenze@phahs.org.za) or Mr J. Marais [jmarais@phahs.org.za](mailto:jmarais@phahs.org.za) .

Die bogenoemde handboeke is uitgereik. Die handboeke moet in dieselfde toestand (soos aangeteken op hierdie vorm) terugbesorg word. Alle handboeke moet oorgetrek word en die verantwoordelikheid vir die veilige bewaring daarvan berus by die leerder self.

Kontroleer asseblief die toestand wat in die handboek aangedui word en spesifiseer dit op die vorm hierbo. Enige handboek wat verloor of beskadig word se koste moet deur die ouers vereffen word. 'n Leerder sal nie handboeke vir die volgende jaar ontvang as al die handboeke op die lys nie terugbesorg of betaal (indien verloor of beskadig) is nie. As u enige probleme/vrae oor die bogenoemde het, kontak asseblief Mev. A Burger @ [aburger@phahs.org.za](mailto:aburger@phahs.org.za) Mej. L. Koenze [lkoenze@phahs.org.za](mailto:lkoenze@phahs.org.za) of Mr J. Marais [jmarais@phahs.org.za](mailto:jmarais@phahs.org.za) .

**Signed Learner/  
Geteken Leerder:**

\_\_\_\_\_

**Signed Parent (Guardian)/  
Geteken Ouer (Voog):**

\_\_\_\_\_

**Date/  
Datum:**

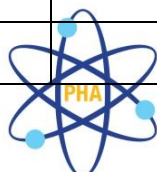
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**TEXTBOOKS/HANDBOEKE  
GRADE 9**

<b>NAME/NAAM:</b> _____		
_____		
<b>CLASS/KLAS: 9</b> _____	<b>Book issued/ Boek uitgereik</b>	<b>Book condition/ Toestand van boek</b>
<b>ENGLISH HL</b>		
Oxford Learner Book		
Oxford Literature Anthology	<b>X</b>	
<b>ENGLISH FAL</b>		
English Today Learner Book		
English Today Reader		
Think Act Sing (Novel)		
<b>AFRIKAANS HL</b>		
Platinum (leerderboek)		
Platinum (leesboek)	<b>X</b>	
Thomas@sms.net	<b>X</b>	
<b>AFRIKAANS FAL</b>		
Afrikaans Sonder Grense (leerderboek)		
Afrikaans Sonder Grense (leesboek)	<b>X</b>	
Spring	<b>X</b>	
<b>GENERAL/ALGEMEEN</b>		
Maths/Wisk (X-factor)		
Natural Science/ Natuurwetenskap		
Social Science/ Socialewetenskap		
EMS/EBW		
LO		





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**Signed Learner/  
Geteken Leerder:**

\_\_\_\_\_

**Signed Parent (Guardian)/  
Geteken Ouer (Voog):**

\_\_\_\_\_

**Date/  
Datum:**

\_\_\_\_\_







PROTEAHOOGTE AKADEMIE

**PHA**

PROTEA HEIGHTS ACADEMY

**TEXTBOOKS/HANDBOEKE  
GRADE 10**

<b>NAME/NAAM:</b> _____		
<b>CLASS/KLAS:</b> 10 _____	<b>Book issued/ Boek uitgereik</b>	<b>Book condition/ Toestand van boek</b>
<b>ENGLISH HL</b>		
Romeo & Juliet	X	
The Mark	X	
English for Success		
<b>ENGLISH FAL</b>		
Master Harold...and Boys		
Spot on English		
Worldscapes		
<b>AFRIKAANS HT</b>		
Platinum (leerderboek)	X	
Driehoekige sirkel	X	
Testament	X	
<b>AFRIKAANS EAT</b>		
Afrikaans Sonder Grense (leerderboek)		
Ink en ander verhale	X	
<b>GENERAL/ ALGEMEEN</b>		
Mathematics/Wiskunde		
Maths/Wisk (X-factor)		
LO		
Accounting/Rekeningkunde		
Economics/Ekonomie		
Physical science/ Fisiese wetenskappe		
Life science/ Lewenswetenskappe		
Geography/ Geografie		
IT		
Atlas		
EGD- Blue		
EDG- MAS		



MATHEMATICS AND SCIENCE FOCUS

WISKUNDE EN WETENSKAP FOKUS



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Please check the condition stated in the textbook and specify on the form above. If you have any problems with the condition stated, please contact Mrs. A Burger @ [aburger@phahs.org.za](mailto:aburger@phahs.org.za)

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Kontroleer asseblief die toestand wat in die handboek aangedui word en spesifiseer dit op die vorm hierbo. As u enige probleme met die voorgeskrewe toestand het, kontak asseblief mev. A Burger @ [aburger@phahs.org.za](mailto:aburger@phahs.org.za)

Enige handboek wat verloor of beskadig word se koste moet deur die ouers vereffen word. 'n Leerder sal nie handboeke vir die volgende jaar ontvang as al die handboeke op die lys nie terugbesorg of betaal (indien verloor of beskadig) is nie.

**Signed Learner/**

**Geteken Leerder:**

**Signed Parent (Guardian)/**

**Geteken Ouer (Voog):**

**Date/**

**Datum:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_





**PROTEAHOOGTE AKADEMIE**  
**PHA**  
**PROTEA HEIGHTS ACADEMY**  
**TEXTBOOKS/HANDBOEKE**  
**GRADE 11**

<b>Name/Naam:</b> _____		
<b>Class/Klas: 11</b> _____	<b>Book issued/ Boek uitgereik</b>	<b>Book condition/ Toestand van boek</b>
<b>ENGLISH HL</b>		
English for Success HL		
Macbeth	X	
Things Fall apart	X	
<b>ENGLISH FAL</b>		
Eng FAL learners book		
Shuters Short Story Anthology		
<b>AFRIKAANS HL</b>		
Droomdelwers	X	
Op die planke (My Japan)	X	
Platinum (leerderboek)	X	
<b>AFRIKAANS FAL</b>		
Kruppel Engel	X	
Afrikaans Sonder Grense (leerderboek)		
<b>GENERAL ALGEMEEN</b>		
Wiskunde: Mind Action Series		
Maths / Wiskunde (X-factor)		
Lewensorientering / Life orientation		
Rekeningkunde/ Accounting		
Ekonomie/ Economics		
Fisiese wetenskappe/ Physical science		
Lewenswetenskappe/ Life science		
Geografie/ Geography		
IT Theory		
IT Delphi		
EGD- Blue		
EGD- MAS		





PROTEAHOOGTE AKADEMIE  
**PHA**  
PROTEA HEIGHTS ACADEMY

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**Signed Learner/**

**Geteken Leerder:**

**Signed Parent (Guardian)/**

**Geteken Ouer (Voog):**

**Date/**

**Datum:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_





TEXTBOOKS/HANDBOEKE  
GRADE 12

<b>NAME/NAAM:</b> _____		
<b>CLASS/KLAS: 12</b> _____	<b>Book issued/ Boek uitgereik</b>	<b>Book condition/ Toestand van boek</b>
<b>ENGLISH HL</b>		
Life of Pi	X	
Hamlet	X	
Imagine Words	X	
<b>ENGLISH FAL</b>		
Study Master Eng Learners		
Shakespeare Macbeth	X	
<b>AFRIKAANS HL</b>		
Onderwereld	X	
Krismis	X	
Platinum (Leerderboek)	X	
<b>AFRIKAANS FAL</b>		
Lien se lankstaanskoene	X	
<b>GENERAL/ALGEMEEN</b>		
Wiskunde: Mind Action Series	X	
Maths / Wiskunde (X-factor)	X	
Lewensorientering / Life orientation	X	
Rekeningkunde/ Accounting		
Ekonomie/ Economics		
Fisiese wetenskappe/ Physical science (Oxford)		
Fisiese wetenskappe/ Physical science (S&M)		
Lewenswetenskappe/ Life science		
Geografie/ Geography		
IT Theory		
IT Delphi		
EGD- BLUE		
EGD- MAS		





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**Signed Learner/  
Geteken Leerder:**

**Signed Parent (Guardian)/  
Geteken Ouer (Voog):**

**Date/  
Datum:**

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