



**LIMPOPO**

**PROVINCIAL GOVERNMENT**  
REPUBLIC OF SOUTH AFRICA

PROVINCIAL TREASURY

# ***RECORDS MANAGEMENT***

# ***POLICY***

<b><i>Date</i></b>	<b><i>Author</i></b>	<b><i>Details of change</i></b>	<b><i>Section affected</i></b>
	<i>BS Matamela</i>	<i>First Version</i>	<i>Entire document</i>

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## 1. PREAMBLE

- 1.1 Since 1994, several changes in the legislations of this country have been introduced with the aim of reinforcing the democratic principles as laid down in the Constitution of the Republic of South Africa Act, 1996 (Act no 108 of 1996), inclusive of the Public Finance Management Act, 1999 (Act No.1 of 1999), Promotion of Access to Information Act, 2000 (Act No.2 of 2000) Promotion of Administrative Justice (Act No. 3 of 2000). These acts were promulgated to promote basic constitutional values such as transparency, accountability and efficiency.
- 1.2 The aim of this policy is to address inconsistencies and uncertainties with regard to record management practices with LPT. This document also provides the framework for LPT to effectively and efficiently fulfill its obligations and statutory requirements as prescribed in the archival legislation of the new dispensation.

## 2. DEFINITIONS

- 2.1 “**Act**” means the National Archives and Records Service Act (Act No.43 of 1996 as amended);
- 2.2 “**Archival value**” means those values, administrative, fiscal, legal, evidential and/or informational which justify the indefinite or permanent retention of records;
- 2.3 “**Archives**” means records in the custody of an archives repository;
- 2.4 “**Archives repository**” means either the Limpopo Provincial Archives or the National Archives repository;

- 2.5 “**Case File**” means a file created for each person or item within a specific group e.g. personal file, tender file etc);
- 2.6 “**Closed volume**” means the volume of records in a current classification system that have reached the thickness of three (3) centimeters or have become full , after which a new volume has been opened;
- 2.7 “**Correspondence System**” means a set of paper-based and electronic communications and associated documents, sent, received, generated, processed and stored during the conduct of business;
- 2.8 “**Current Records**” means record that form part of a records classification system still in use;
- 2.9. “**Custody**” means the control of records based upon their physical possession.
- 2.10 “**Department**” means Provincial Treasury in Limpopo Provincial Administration
- 2.11 “**Disposal**” means the action of destroying / deleting a record or transferring it into archival custody;
- 2.12 “**Disposal Authority**” means a written authority written by the National Archivist specifying which records should be transferred destroyed /deleted or otherwise disposed of;
- 2.13 “**Disposal authority number**” means a unique number identifying each disposal authority issued to a specific office;
- 2.14 “**Disposal instruction**” means the specific instruction regarding disposal allocated to each record e.g. D for delete/destroy and A for transferring into archival custody;

- 2.15 “**Electronic document management system**” means a system that provides the ability to capture, describe and categorize, store and retrieve, share and re-use electronic documents regardless of specific format;
- 2.16 “**Electronic records**” means information which is generated electronically and stored by means of computer technology. These records can consists of an electronic correspondence system and electronic record systems other than the correspondence system
- 2.17 “**Electronic Records Management System**” means a system that supports the medium to long term information needs of an office. It provides functionality over and above that of an electronic document management system to preserve the security, authenticity and integrity of records to enable the permanent preservation of records. The system can “manage a corporate file plan according to which records are filed; maintain the relationship between records and files; maintain relationship between file series and the file plan; identify records that are due for disposal and manage the disposal process; associate the contextual and structural data within a document; construct and manage audit trails; manage record version control; manage the integrity and reliability of records once they have been declared as such and manage records in all formats in an integrated manner”.
- 2.18 “**Electronic record system**” are all components of an electronic information system, namely: electronic media as well as all connected items such as source documents, output information, software applications, programs and meta-data (background and technical information i.r.o the information stored electronically) and in hard copy.
- 2.19 **Employee**” means any person employed by the Department: Provincial Treasury in Limpopo either on temporary or permanent basis or offering services to the department voluntarily;

- 2.20 **“File”** means an organized arrangement of records on the same subject accumulated in a chronological order within the same cover/folder/container; or the physical action of allocating file reference numbers to records and placing them inside the cover/folder/ container.
- 2.21 **“File plan”** means a pre-determined logical and systematic structure into which records are arranged and intellectually stored according to subject groups and subjects to facilitate efficient retrieval and disposal of records. The file is used for both current paper-based and current electronic correspondence systems. It usually contains the reference number, title, and description and disposal authority of files/folders held in an office.
- 2.22 **“Filing system”** is a collective noun for a storage system (like files, boxes, shelves or electronic applications and storage systems) in which records are stored in a systematic manner according to a file plan.
- 2.23 **“File reference”** is a unique identifier for a file. This can be numerical, alphanumerical or alphabetical identifier. It is used to link a record to its specific subject file and subject grouping.
- 2.24 **“Integrated Document Management”** is a set of methods and technologies consisting of messaging & calendaring, imaging & scanning, file/document tracking, electronic document management, electronic records management, and search & retrieval functionalities, used to manage the workflow classification, location, movement, security, auditing retention and disposal of an organization’s records regardless of format.
- 2.25 **“National Archives”** means the National Archives and Records Service of South Africa;
- 2.26 **“Provincial Archives”** means Limpopo Provincial Archives;

- 2.27 “**Public Record**” means a record created or received in pursuance of the activities of a public body.
- 2.28 “**Records**” means (i) recorded information regardless of form or medium, (ii) evidence of a transaction preserved for the evidential information it contains.
- 2.29 “**Record Classification System**” refers to a plan for systematic identification and arrangement of business activities and/or records into categories according to logically structured conventions, methods and procedural rules represented in the classification system. The records classification systems prescribed by the National Archives and Records Service are filing system for correspondence systems and the schedule for records other than correspondence systems.
- 2.30 “**Recording**” means anything on which sounds or images or both are fixed or from which sounds or images or both are capable of being reproduced, regardless of form.
- 2.31 “**Record-keeping**” refers to making and maintaining complete, accurate and reliable evidence of official business in the form of recorded information.
- 2.32 “**Records Management**” means the management of information resources in the manner that makes information easily accessible, securely stored and disposed of when no longer required for administrative purposes.
- 2.33 “**Record system**” is a collection of policies and systems, which capture information according to a records classification system, manage, store and provide access to records and their context over time.

- 2.34 “**Regulations**” means the National Archives and Records Service of South Africa Regulations 2002, Regulation R158 published in the Government Gazette No. 24085 of 20 November 2002.
- 2.35 “**Retention period**” means the length of time that records should be retained in offices before they are transferred into archival custody or destroyed/deleted.
- 2.36 “**Schedule of records other than correspondence systems**” refers to a control mechanism for records other than correspondence files (other records) which contains a description and the disposal instructions and retention periods of all other records. The system consists of schedule for paper- based records other than correspondence files, schedule for electronic records system other than the electronic correspondence system, schedule for microfilm records and schedule for audio-visual records.
- 2.37 “**Scheduled**” refers to records in respect of which disposal authority has been issued and which are due for disposal on a specific date.
- 2.38 “**Terminated records**” refers to records which were created or received by a governmental body and which were managed by a records classification system no longer in use.
- 2.39 “**Unscheduled**” are records in respect of which a written disposal authority has not yet been issued which can thus not be disposed of.
- 2.40 “**Vital/essential records**” are records that protect the enduring civil, legal, financial, property and other rights of the citizens of a country; records that are needed to continue operational responsibilities under disaster conditions and records that protect the legal and financial rights of the Government.



- 2.41 “**Working file**” means a personal file made up of copies kept by the official for quick actions and/or reference.

### **3. APPLICABLE LEGAL FRAMEWORK**

**This policy is informed by the following legal framework:**

- 3.1 Constitution of the Republic of South Africa Act, 1996 (Act No. 108 of 1996).
- 3.2 National Archives and Records Service of South Africa Act, 1996 (Act No. 43 of 1996) as amended.
- 3.3. National Archives and Records Service of South Africa Regulations(R158 of November 2002)
- 3.4 Northern Province Archives Act, 2001 (Act No. 5 of 2001)
- 3.5 Promotion of Access to Information Act, 2000 (Act No. 2 of 2000)
- 3.6 Public Finance Management Act, 1999 (Act No.1 of 1999)
- 3.7 Promotion of Administrative Justice Act, 2000 (Act No.3 of 2000)
- 3.8 Electronic Communications and Transactions Act, 2002 (Act No.25 of 2002)
- 3.9 Protection of Information Act, 1984 (Act No.84 of 1984)
- 3.10 National Information Security Regulations
- 3.11 National Minimum Information Requirements(NMIRDPSA Circular No. 4 of 2001)
- 3.12 Public Service Act, 1994 (Act No. 103 of 1994) as amended.
- 3.13 Public Service Regulations, 2001 as amended
- 3.14 Basic Conditions of Employment Act, 1997(Act No. 75 of 1997)
- 3.15 Employment Equity Act, 1998 (Act No. 55 of 1998)
- 3.16 Skills Development Act, 2003 (Act No. 31 of 2003)
- 3.17 Labour Relations Act, 1995 (Act No. 66 of 1995)

#### **4. POLICY PRINCIPLES AND VALUES**

- 4.1 Records management is a process of ensuring the proper creation, maintenance, use and disposal of records throughout their life cycle to achieve efficient, transparent and accountable governance. LPT should have ready access to the information it requires to deliver its services to the public in an accountable manner.
- 4.2 The management of LPT in general, has a responsibility to ensure that all components in LPT create and have access to complete credible information resources to enable the decision-making process to be in the interest of the public. Information is the power of any public organization. Information is a key resource of any organization to run its activities effectively and efficiently. The Organization's information is informed by its records. Therefore, well kept and organized records have the following values to the department in that:
- 4.2.1 LPT will be able to find the right information easily and comprehensively;
  - 4.2.2 well kept and organized records improve the flow of information and knowledge sharing in LPT;
  - 4.2.3 LPT will be able to perform and conduct its functions successfully and efficiently and effectively in an accountable manner;
  - 4.2.4 they support the business, legal and accountability requirements of LPT;
  - 4.2.5 records ensures the consistent delivery of services;
  - 4.2.6 they provide continuity in the event of a disaster;
  - 4.2.7 they support and document policy formation and administrative decision-making;

4.2.8 they protect the interest of LPT and the rights of employees, clients at present and future stake holders;

4.2.9 records support and document LPT's activities, development and achievements;

## **5. PURPOSE OF THE POLICY**

**The purpose of this policy is to ensure the following:-**

- 5.1 that records as evidence of LPT's business are created and maintained;
- 5.2 access to records of LPT are regulated;
- 5.3 promotion of accurate records classification and their proper storage;
- 5.4 records of LPT are easily accessible whereby transparency and accountability are promoted;
- 5.5 security and protection of records in LPT are strengthened;
- 5.6 the intra and inter-departmental transfer of records is regulated;
- 5.7 ensure that only authorized persons have access to the information;
- 5.8 elimination of unnecessary duplication of records;
- 5.9 facilitate the retention and disposal programmes whereby LPT will be able to maintain only those records it really needs for functional purposes;
- 5.10 promote the prevention of information or records from being damaged or stolen;
- 5.11 ensures the protection of privacy and confidentiality;

- 5.12 promote the prevention of inappropriate disclosure of information that could harm LPT or infringe the privacy rights of individuals;
- 5.13 promote regular inspection of records;

## **6. POLICY SCOPE OF APPLICATION**

- 6.1 This policy unless otherwise indicated, applies to all employees of LPT.
- 6.2 In accordance to record types/groups, the policy applies to all records created or received regardless of a form or medium.
- 6.3 All records (i.e. staff files, administrative files, accounting files, tender files etc) generated within LPT, its District offices and vertical programmes should be managed in accordance to the provisions of this policy and the National Archives Act (i.e. National Archives and Record Service of South Africa, Act – Act 43 of 1996 as amended).
- 6.4 All electronic transactions such as e-mails and web-based records which are relevant to the information gathering, policy-formulation or decision making processes of LPT are part of the scope of this policy and as such hard copies of this document are supposed to be filed in the appropriate subject file until such time that an electronic document and records management system under research (i.e. by Provincial Transversal Records Management unit and SITA) is implemented.
- 6.5 Other paper-based records such as maps, plans, diagrams, registers etc should be managed in line with this policy.
- 6.6 Audio-visual records such as tape-records of committees, video tapes for events of LPT etc are also part of the scope of this policy.

## **7. POLICY PROVISIONS / RESPONSIBILITIES**

- 7.1 The policy is issued under the authority of the Head of Department: Provincial Treasury in terms of the Records Management Policy Manual which is issued in accordance to the provisions of Section 13 (4) of the National Archives and Records Service Act, 1996 (Act No.43 of 1996) as amended.
- 7.2 **Records management is a collective responsibility of all the employees in LPT.** All employees of LPT have an obligation to create and to ensure that records are managed according to sound records management practices.
- 7.3 The following are some of specific responsibilities for proper records management in LPT:
- 7.3.1 The Head of Department is the overall responsible person for sound records management within LPT. He/she should at all times ensure that the department's records management practices comply with the provisions of the National Archives Act, 1996 (National Archives and Records Service Act of South Africa Act, 1996 (Act No. 43 of 1996) as amended.
- 7.3.2 The Head of Department delegated the function for the "management of records" to the Records Manager (i.e. Senior Manager: Records Management). The Records Manager has delegated powers/authority to set and issue standards in relation to the management of records, monitor and audit compliance with those standards.
- 7.3.3 Records management operations are to be carried out on devolved basis in accordance with the central approved policy and records management standards. Each District office (i.e. Tender Advise Center office) within the department is responsible for effective record-keeping relating to its functions, including the allocation of resources. Heads of Tender Advise Centers in the

Districts are therefore responsible for sound record-keeping within their areas of responsibility. Uniform integrated records creation, storage and archiving system will be used to access records of the department.

7.3.4 The Records Manager, who is the Head of Records Management component, is appointed by Head of Department. Amongst others, the Records Manager has the following key responsibilities to perform with the assistance of his/her two information managers (i.e. Manager: General Records and Manager Human Resource Records):

- 7.3.4.1 manage records management program in LPT,
- 7.3.4.2 control over the maintenance and application of the filing system and records control schedule;
- 7.3.4.3 development of records classification systems;
- 7.3.4.4 advise employees of LPT about records related issues;
- 7.3.4.5 safe custody of records;
- 7.3.4.6 inspect records of LPT;
- 7.3.4.7 disposal of records; and
- 7.3.4.8 exercise control over staff in General and Human Resource Registries

7.4. All managers, Senior Managers and Executive Managers in the department should ensure that this policy and its associated standards are implemented within their business units.

7.5. All employees of LPT should be aware of record-keeping requirements that affect the performance of their functions. All employees in the employ of the department have an obligation to:

- i) create records;
- ii) register records in line with record-keeping systems;
- iii) transfer records to appropriate record-keeping systems;

iv) ensure that records are not destroyed without authorization.

## **8. POLICY AND PROCEDURE MANUAL**

### **8.1 Creation of Records**

- 8.1.1 All employees of LPT must create records that adequately document the business activities in which they take part in line with the Departmental filing system.
- 8.1.2 Only officials in Records Management Units (General and Human Resource Records Management) open and close files.
- 8.1.3 All records created in pursuance of the activities of the department must remain the property of LPT throughout their life cycle.
- 8.1.4 Records created by Service Providers and Contractors employed by LPT to perform work on its behalf are public records and shall remain the property of LPT throughout their life-cycle.
- 8.1.5 Contracts entered into between LPT and service providers must state clearly that the ownership of records resides with the department.

### **8.2 Records Classification and Storage**

- 8.2.1 All recorded files shall be classified and managed in line with the approved Functional Subject File Plan. LPT has three such file plans, namely the General, Staff and Ministerial Filing Systems.
- 8.2.2 All official documents and communications, including letters, faxes, and e-mails should contain a reference number derived from an approved classification system.

- 8.2.3 All records shall be classified and managed in accordance with documented and approved classification systems. Employees are obliged to ensure that no individual / separate files or record-keeping systems are maintained. Records should be regularly transferred to an appropriate record storage area to avoid the built-up of piling system in offices.
- 8.2.4 LPT shall have the main/central Registry Office where all incoming mail will be received, opened, sorted, and distributed internally and externally. The receiving and distributing should be recorded in the relevant registers.
- 8.2.5 Files should be temporarily stored in active file storage (e.g. Registry) for as long as they are actively utilized for administrative purposes. Files should only be transferred to a semi-active file storage area when the demand for it declines. The records should be finally stored in LPT's main storage facility until they reach their normal disposal period.
- 8.2.6 Records should be stored in a way that minimizes undue damage. All records, including those in boxes should not be stored on the floor.
- 8.2.7 Records should be stored in the most efficient manner. Storage costs, office and stack and stack space occupied should be balanced against cost and time taken to retrieve records.
- 8.2.8 Shelves, equipments and containers for records storage should ensure that records are secure, accessible and protected from unnecessary deterioration.
- 8.2.9 Records should be stored in environmental conditions that are appropriate to their format and retention period.
- 8.2.10 Records should be managed as stipulated in LPT's Registry Procedure Manual.



- 8.2.11 All control registers should be available and maintained in all record-keeping storage areas. Control registers should be properly maintained for future traces of records. Recordings of collected records should be neat and readable. Recordings in registers should be written in non-erasable black or blue-ink pens that will last for the duration of the records (i.e. approximately +20 years).
- 8.2.12 The location of each file should be recorded and updated at every movement to ensure that records, as assets, can be accounted for in the same way that other departmental assets are.
- 8.2.13 All records should be stored in purpose built records storage areas. Officers / employees should minimize the number of files they keep at their workstations/offices. Only one working file can be maintained by an official at a time and it should be for a limited period.
- 8.2.14 Officials/employees should at all times notify Records Management Unit when passing records on to another officer/employee.
- 8.2.15 Officials/employees can maintain their own working files as long as no original record/s is/ are placed in a working file. Thus working file should consist of copies only.
- 8.2.16 Under no circumstances should staff members of LPT take files home. Should it become more necessary that part of some work is done whilst an officer/employee being at home, photocopies of relevant documents only should be made for that purpose and thereafter be destroyed by a cross-cut shredding machine.
- 8.2.17 Case files such as staff personal files, bursary files, contracts and suppliers files etc shall be classified in accordance with LPT's-wide recognized and approved systems. For example, personal files should be classified in accordance to a unique number "i.e. PERSAL" number. Classification / numbering systems for all case files are outlined in the list "List of Series of Case Files" at the back of the approved filing systems.

### **8.3 Access to Records**

- 8.3.1 All records storage areas should be designed and built in a manner that minimizes unauthorized access to records.
- 8.3.2. Access to records storage areas and registries should be properly controlled.
- 8.3.3. Records should be stored in facilities where they can be identified, located and retrieved easily when such need arises.
- 8.3.4. All access to departmental records by members of the public should be treated in accordance with the provisions of the Promotion of Access to Information Act, 2000 (guidelines are contained in the Department's Section 14 manual on the Promotion of Access to Information Act, 2000 – Act 2 of 2000).
- 8.3.5. To prevent access to records by any person, requesters are obliged to sign a request form for every item required and such request should undergo all the prescribed stages of the process before a record can be granted.
- 8.3.6. Officials in LPT wishing to access records for their own purpose other than official duties should first obtain permission of the Head of Department and/ or the Designated Deputy Information Officer/s.

### **8.4 Records Protection and Security**

- 8.4.1 All records storage areas should be designed and built in a manner that minimizes unauthorized access to records.

- 8.4.2 All records created within LPT should be allocated a security classification level in line with Minimum Information Security Standards (e.g. Top Secret, Secret, Confidential and Restricted).
- 8.4.3 Effective key control should be instituted for all record storage areas. The keeping of registers for keys, the safe custody of duplicate keys and control over such keys must be strictly adhered to. File storage areas should be locked overnight wherever possible to prevent unauthorized access.
- 8.4.4 Records should at all times be protected, maintained, and usable for their entire retention period as outlined in the relevant disposal authority.
- 8.4.5 All records storage areas should be regularly fumigated to protect records from possible damage by rodents and insects.
- 8.4.6 All records should be protected from dirt, dust and excessive light that can cause them to worn-out before their life-span.
- 8.4.7 Risk management programs should be established and maintained to ensure that risks to records are either removed or managed appropriately.
- 8.4.8 All personnel dealing with the management of records and all other officials/employees that interact with records and information contained in them should be subjected to security clearance in line with the Minimum Information Security Standards.
- 8.4.9 Movement of files between service areas within an institution shall be monitored and controlled to protect records against damage, loss and theft.

- 8.4.10 All classified files and documents should be placed in a secure storage area when not in use.
- 8.4.11 Employees in LPT are obliged to handle records sensibly with care and respect in order to avoid unnecessary damage to records with a view to prolong their lifespan.
- 8.4.12 Employees are not supposed to hand-over records or disclose information contained in them without official approval.

## **8.5 Transfer of Records**

- 8.5.1 Officials/employees attached to the Records Management Units should at all the time keep registers of all files transferred intra -departmentally or inter-departmentally. These transfers often occur when functions are transferred from one office to another. If records are to be transferred permanently, the Provincial/National Archivist should be informed through the Office of the Senior Manager: Records Management.
- 8.5.2 No official records to be transferred to a private or an off-site data/records storage facility without prior authorization of the Head of Department and the National Archives.
- 8.5.3 Any transfer of public records to a private or an off-site data/records storage facility should be informed by an expert advise from the National Archives.

## **8.6 Inspection of Records**

8.6.1 The Head of Records Management Unit shall conduct records inspection on a regular basis and advise the Head of Department about their condition under which records are managed.

8.6.2 The Records Management Unit should inspect all records due for destruction to validate authorization and appropriateness.

8.6.3 All departmental units should, subsequent to consultations with the Head of Department, provide access for authorized National Archives and Records Service officials to records in the custody of the department. In terms of Section 13(2) (c) of the National Archives and Records Service Act, 1996 (Act No. 43 of 1996), the Provincial and the National Archivists are supposed to conduct inspections of records held by the department.

8.6.4 Reports of all audits/inspections should be managed in line with this policy.

## **8.7 Disposal of Records**

8.7.1 In terms of Section 13(2) of the National Archives and Records Service of South Africa Act, 1996 no public records under the control of a governmental body may be transferred to an archives repository, destroyed, erased, dumped on the corridors or otherwise disposed-off without a written disposal authority issued by the National Archivist.

8.7.2. Destruction of records should only take place once there is assurance that records are no longer required. Before a public record can be destroyed, it must be ensured that there is no pending/outstanding work, litigation, investigation or request that would involve the records in

question in terms of Promotion of Access to Information Act, 2000 or the Promotion of Administrative Justice Act, 2000.

- 8.7.3 Common records to all governmental institutions like “Applications for Employment – Z83, should be disposed in accordance with the relevant National Archives-issued as General Disposal Authority with the approval of the Head of Department.
- 8.7.4 Records with archival value should be transferred to a relevant Archives Repository after twenty (20) years of their creation. The transfer of these records should be done after obtaining the approval of the Head of Department and necessary arrangements with the relevant archives repository.
- 8.7.5 Correspondence files should be destroyed in accordance with the disposal authority issued by the National Archives and Records Service following the Head of Department’s approval.
- 8.7.6 All employees of LPT who intend or wish to dispose public records should first seek the approval of the Head of Department before such records can be destroyed.

## 9. **POLICY REVIEW.**

This policy is subject to annual review or when deemed necessary by LPT, to ensure that it is aligned to prevailing legislation and market conditions.

### 9.1. **POLICY AMENDMENTS.**

No amendment(s) may be made to any section of this policy without such amendment(s) first being:-

- negotiated with recognized Employee Organizations; and

- duly approved and signed by the recognized parties to the Provincial Bargaining Council.

**10. EFFECTIVE DATE.**


This policy will be effective from 22 June 2007 (date).

**11. RATIFICATION.**

This policy was signed on the 22 (day of)

June (month) At POLOKWANE (place)

**HEAD OF DEPARTMENT**

: 

**MEMBER OF EXECUTIVE COUNCIL**

: 