

## **BEEI AUDIT PREP PHASE 5**

### **PERSONAL DOCUMENTS OF ASSISTANT**

1. CURRICULUM VITAE
2. COPY OF VALID ID (PORTFOLIO)
3. QUALIFICATION/S (PORTFOLIO)
4. PROOF OF BANK ACCOUNT
5. SARS NUMBER

### **EMPLOYMENT DOCUMENTS OF ASSISTANT:**

6. CONTRACT (PORTFOLIO)
7. RELEVANT JOB DESCRIPTION (PORTFOLIO)
8. ACCEPTANCE LETTER
9. DECLARATION FORM (NOT RECEIVING GRANTS)
10. NAME CLEARANCE CERTIFICATE (PORTFOLIO)
11. TRAINING CERTIFICATES (PORTFOLIO)
  - a. ORIENTATION
  - b. KITSO (DIGIFY)
  - c. NATIONAL SCHOOL SAFETY FRAMEWORK (NSSF)
  - d. NEMISA
12. PERFORMANCE REPORTS MONTHLY (MANUAL OR NDMS)
13. PAYSLEIPS
14. TESTIMONIAL (MENTOR/PRINCIPAL)

### **DOCUMENTS SCHOOL MUST HAVE:**

1. ALLOCATION LETTER
2. HARAMBEE LISTS
3. LIST OF SHORTLISTING MINUTES
4. LIST OF SHORTLISTED CANDIDATES
5. PROOF OF NOTIFICATION FOR INTERVIEWS
6. INTERVIEW SCHEDULE
7. INTERVIEW MINUTES
8. INTERVIEW SCORE SHEET AND QUESTIONS
9. LIST OF SUCCESSFUL CANDIDATES
10. CIRCULAR REGARDING PHASE III
11. IMPLEMENTATION FRAMEWORK III
12. FINANCE CIRCULAR PHASE III
13. INTERNAL ADVERT IN COMMUNITY
14. LETTER TO PARENTS REGARDING PROJECT AND APPOINTED ASSISTANTS
15. SIGNED MOA
16. PRINCIPALS SIGNED DECLARATION

**RESPONSIBILITIES FOR SCHOOL:**

1. TO PAY UIF
2. ATTENDANCE REGISTERS (MANUAL OR NDMS)
3. DEDUCT DAYS ABSENT (RECORD IT ON PAYSLEIPS AS WELL)
4. PROOF OF PAYMENT REFUNDED TO DEPARTMENT
5. PAY DATA TO ASSISTANT
6. CONTROL SHEET SIGNED FOR DATA
7. SIGNED CONTROL SHEET FOR PAYSLEIPS
8. DOWNLOAD MONTHLY BANK STATEMENT (PROOF OF STIPEND TO ASSISTANT)

**SCHOOLS TO HAVE COPIES OF PORTFOLIOS FOR AG AUDIT PURPOSES  
ASSISTANT TO GET ORIGINAL PORTFOLIO OF EVIDENCE.**

**School Letterhead**

**TO WHOM IT MAY CONCERN**

**PLACEMENT REFERENCE / TESTIMONIAL**

This is to certify that Mr/Ms (Name) \_\_\_\_\_ and (Surname) \_\_\_\_\_

ID NO.

--	--	--	--	--	--	--	--	--	--	--	--	--	--

was employed on contract at \_\_\_\_\_ school as part of the Basic Education Employment Initiative (BEEI – PHASE V) as follows:

<b>Job Title</b>	Education Assistant / General School Assistant
<b>Mentor's Name</b>	
<b>Commencement Date</b>	
<b>End of contract/exit date</b>	

During the above period of placement, Mr / Ms \_\_\_\_\_ acquired the following skills:

1	
2	
3	
4	
5	
6	
7	

8	
9	
10	

PERSONALITY :

.....

.....

.....

.....

WORKETHIC:

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.....

PUNCTUALITY & ATTENDANCE:

.....

.....

.....

OTHER:

.....

.....

.....

Yours sincerely

\_\_\_\_\_  
PRINCIPAL

DATE

School Stamp

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

**MINUTES OF SHORTLISTING MEETING WITHIN THE BEEI HELD AT.....  
ON ..... AT .....**

**IN ATTENDANCE:**

**SGB**

.....  
.....  
.....  
.....

**SMT**

.....  
.....  
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.....

**1. APOLOGIES**

Apologies for absence were received from ..... (list the names)

**2. DECLARATIONS OF CONFIDENTIALITY**

The Chairperson spoke about the confidentiality aspect of the shortlisting process and the consequences should anyone be found guilty thereof.

Chairperson asked all members to sign the confidentiality letters.

Letters need to be filed.

**3. SHORTLISTING FOR THE EA POSTS**

The panel considered the applications received on the Harambee lists.

Panel take into consideration the criteria for application as well as the job descriptions of the different portfolios as these will be the skills required of the assistants.

The panel narrowed it down to \_\_\_\_\_ (fill in) applicants that will be invited to a formal interview for the position as an EA.

At the interviews, the final selection will take place.

**4. SHORTLISTING FOR THE GSA POSTS**

The panel considered the applications received on the Harambee lists.

Panel take into consideration the criteria for application as well as the job descriptions of the different portfolios as these will be the skills required of the assistants.

The panel narrowed it down to \_\_\_\_\_ (fill in) applicants that will be invited to a formal interview for the position as an EA.

At the interviews, the final selection will take place.

## 5. CONCLUSION

The Chairperson reads the names of the candidates to be invited to a formal interview.

The panel decided that the interviews will take place on .....(date) at .....(time)

The Secretary will contact the candidates via telephone call to inform them about the interview and the logistics thereof

The Secretary will note the time and date of the call, on the list provided, as well as whether the invitation was accepted or declined.

All the documentation and minutes will be filed and stored.

The Chairperson asked the panel to please meet an hour before the interviews in order to set up and print the questions for the interviews.

Chairperson thank all members of the panel for their time, effort and commitment.

Meeting adjourned at .....(time)

**Name of School:** .....

[illegible]

**Name of Candidate: ..... (Timeslot)**

[illegible]

**SCORE SHEET:**

Directions	Excellent	Good	Fair	Needs Improvement	Poor
Answer to question 1	5	4	2-3	1	0
Answer to question 2	5	4	2-3	1	0
Answer to question 3	5	4	2-3	1	0
Answer to question 4	5	4	2-3	1	0
Answer to question 5	5	4	2-3	1	0
Answer to question 6	5	4	2-3	1	0



## POSSIBLE QUESTIONS FOR INTERVIEWS

1. Were you part of Phases 1, 2,3 or 4 of this project?
2. Why do you think you are qualified to be an Educator/General assistant?
3. How can you assist the teacher in class?
4. What will you do if the learners in class is disruptive and rude?
5. Do you think children should have fun in the class.
6. If a teacher does something you strongly disagree with, how will you handle the situation?
7. Do you like children?
8. Do you think assistants must be on their phones at school.
9. If the principal asks you to be at school on a Saturday or during the holiday, will you agree?
10. What are your hobbies?
11. Why do you want this job?
12. Why should we appoint you in an EA/GSA role?
13. Mention 2 of your strengths?
14. Mention one weakness that you have?
15. How will you motivate the learners?
16. What do you think will be your greatest challenge should you get the post?
17. Where do you see yourself in the next three years?
18. How will you treat a bully?
19. Can you work on a computer and how are your computer skills?
20. Do you think schools must be neat and organised? Why?
21. In your position as an assistant, what will you be good at?
22. Are you comfortable working outside on the schoolgrounds?
23. Did you ever do any handyman/woman jobs?
24. What does respect mean to you and how will you practice it at school?

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

## Performance Assessment Form

## BEEI – PHASE V

Monthly Performance Report: Education Assistant / General School Assistant

This performance report should be completed **online** on each Education Assistant / General School Assistant by the school **principal / mentor** on the last school day of each month. Must be **printed and filed in Portfolio of Evidence**

Appointment Level	Education Assistant		General Assistant	
Employee Name	Surname:		First Names	
ID Number			D.O.B.	
Period of contract	From:		To:	
Principal's Name				
Mentor's Name				
School Category	Primary	Secondary	Combined	Special
EMIS Number				
Quintile Rank	1	2	3	4 5

Rate the performance of Education Assistant / General School Assistant

### 1. General Factors

Tick the appropriate column	Satisfactory	Unsatisfactory
1. Attendance		
2. Reliability		
3. Thoroughness and Accuracy		
4. Willingness to Learn		
5. Friendliness and Helpfulness		
6. Flexibility		
7. Cooperation with colleagues		
8. Initiative and Creativity		

### 2. Key responsibilities (Identify and rate at least 5 activities undertaken as per Job Description)

Key Responsibilities	Satisfactory	Unsatisfactory
1.		
2.		
3.		
4.		
5.		

Details of any training programmes/activities to which the Education Assistant/ General School Assistant have been subjected to during the month:

Overall Remarks by Principals:
Employee's Remarks:

NAME AND SURNAME IN PRINT (ASSISTANT)	SIGNATURE	DATE
NAME AND SURNAME IN PRINT (MENTOR)	SIGNATURE	DATE
NAME AND SURNAME IN PRINT (SCHOOL PRINCIPAL)	SIGNATURE	DATE

SCHOOL STAMP
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SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

**BASIC EDUCATION EMPLOYMENT INITIATIVE (BEEI): PHASE V**

SALARY ADVICE FOR MONTH: \_\_\_\_\_ 2025

PAYMENT NO.	TAX NUMBER	IDENTITY NUMBER	SURNAME & INITIALS

JOB TITLE:	NAME OF SCHOOL:

PROVINCE:	DISTRICT:
Western Cape	

BANK NAME	BANK ACCOUNT	PAYMENT PERIOD	GROSS SALARY	DEDUCTIONS	NETT SALARY
			R4 040.00	R40.00	R3 990.00

EARNINGS		DEDUCTIONS	
DESCRIPTION	AMOUNT	DESCRIPTION	AMOUNT
CASH ALLOWANCE	R 4 000.00	EMPLOYER'S UIF CONTRIBUTION	R 40.00
DATA FUNDS	R 30.00	EMPLOYEE'S UIF CONTRIBUTION	R 40.00
		SICK LEAVE	R
		ANNUAL/VACATION LEAVE	R
		PRO-RATA	R

ASSISTANT: \_\_\_\_\_

BURSAR: \_\_\_\_\_

DATE: \_\_\_\_\_

SCHOOL LOGO

NAME OF SCHOOL : \_\_\_\_\_

## LIST OF SHORTLISTED CANDIDATES

The following applicants were shortlisted and will be invited to an interview on .....(date)  
at ..... (time)

[illegible]

Signature of Chairperson: .....

Date: .....

Signature of Secretary: .....

Date: .....

### SCHOOL STAMP

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

## LIST OF SUCCESSFUL CANDIDATES – PHASE V

The following applicants were interviewed and found to be successful to be appointed as assistants within the BEEI project

[illegible]

Signature of Chairperson: .....

Date: .....

Signature of Secretary: .....

Date: .....

SCHOOL STAMP

SCHOOL LOGO

NAME OF SCHOOL : \_\_\_\_\_

**DATE:** \_\_\_\_\_

## INTERVIEW SCHEDULE

The following applicants will be interviewed during the timeslots allocated below

[illegible]

Signature of Chairperson: .....

Date: .....

Signature of Secretary: .....

Date: .....

## SCHOOL STAMP

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

## MINUTES OF INTERVIEW MEETING WITHIN THE PYEI (PHASE IV) HELD

AT ..... ON ..... AT .....

### IN ATTENDANCE:

SGB

.....  
.....  
.....  
.....

SMT

.....  
.....  
.....  
.....

### 1. APOLOGIES

Apologies for absence were received from ..... (list the names)

### 2. DECLARATIONS OF CONFIDENTIALITY

The Chairperson spoke about the confidentiality aspect of the shortlisting process and the consequences should anyone be found guilty thereof.

Chairperson reminded each member of the confidentiality letter they signed at the shortlisting meeting.

### 3. SETTING UP OF QUESTIONS

The panel considered the variety of questions received from WCED.

Chairperson asked members to add questions to the list.

Panel decided on the 6 questions that will be posed to the applicants.

The Chairperson tasked the secretary to type the questions for the interview process.

### 4. INTERVIEWS

The panel call in the applicants according to the interviews schedule.

Six panel member each asked a question.

The panel scored each answer out of 10.

After each applicant the points were calculated on the scoresheets

After the interview of the last candidate, the panel reviewed the scoresheets and the secretary noted the ..... successful candidates.



The Chairperson tasked the secretary to inform the candidates and to invite them to school for a short meeting where the Principal will inform them about the way forward and the compulsory online orientation that they must complete before they can be offered a contract..

## 5. CONCLUSION

The Secretary will contact the candidates via telephone call to inform them about the results and the way forward as stipulated by the Chairperson

The Secretary will note the time and date of the call, on the list provided, as well as whether the invitation was accepted or declined.

All the documentation and minutes will be filed and stored.

Chairperson thank all members of the panel for their time, effort and commitment.

Meeting adjourned at .....(time)

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

**DECLARATION FOR CORRECTNESS OF INFORMATION**

I \_\_\_\_\_ Principal of \_\_\_\_\_

**Declare that the information provided to the circuit and district office on the Basic Education Employment Initiative (BEEI) is correct and I further declare that:**

- Recruitment processes were with integrity, transparent and adhered to DBE guidelines.
- No Assistant was unfairly advantaged above others due to relations with SGB or SMT members
- Needs analysis of the school was done to ascertain categories of Assistant/s required
- Youth placed in my school meet the requirements as stated in the Recruitment Guideline
- Youth placed
- Youth signed placement contract
- Youth are assigned a mentor/supervisor
- Youth are assigned duties relevant to the job they are appointed for.
- The Curriculum Assistant are supporting teachers in classrooms, they are assigned in the correct subjects as per guideline
- The Reading Champions are supporting reading in school, are placed at the correct grades as per guideline
- The eCadres / ICT Champion are assisting teacher and learners with ICT, are assisting with FPMS and SASAMS/CEMIS
- The PSSA are supporting learners throughout the day.
- Handyman/woman are assisting with school infrastructure maintenance (NOT JUST GARDENING)
- Youth are encouraged to attend training offered in the project
- Youth are managed and regarded as part of employees of the school
- Youth's performance is assessed continuously to add value to their career growth
- Money allocated to the school for the initiative is utilised for the purpose intended
- Youth will be paid the correct amounts as stipulated in the framework
- Youth placed in my school will be supported in their career planning and growth.
- Youth will receive testimonial at the end of the project or phase, whichever comes first.
- The school will implement the Finance & Personnel Management System (FPMS) as the official reporting system for BEEI.

\_\_\_\_\_  
NAME AND SURNAME IN  
PRINT (SCHOOL PRINCIPAL)

\_\_\_\_\_  
SIGNATURE (SCHOOL  
PRINCIPAL)

\_\_\_\_\_  
DATE

\_\_\_\_\_  
NAME AND SURNAME IN PRINT  
(SGB CHAIRPERSON)

\_\_\_\_\_  
SIGNATURE (SGB  
CHAIRPERSON)

\_\_\_\_\_  
DATE

SCHOOL STAMP

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

## Timesheets / Attendance Registers

[illegible]

Checked and sign every Friday

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

### Recruitment Checklist – PHASE V

<b>DETAILS</b>				
Name of school				
EMIS Number				
Principal of the School				
Circuit Name				
<b>VERIFICATION</b>	<b>School Admin signature</b>	<b>Principal Signature</b>	<b>Circuit Manager</b>	<b>District Coordinator / Director</b>
Did the School Adhere to the allocation as per the allocation letter?				
Are there appointment letters of the panel?	Panel constructed and mandated by the School Governing Body to do the Recruitment and Selection Process of Phase V			
Did the School adhere to the recruitment guidelines?				
Do the score sheets conform to the Framework and the Recruitment Guideline?				
Do the recommended candidates meet the requirements as per the framework?				
Did the recommended candidates submit the following: (a) Certificate for NSRO, PCR, Online Compulsory courses, ID, CV, Matric where required, Testimonial, Name Clearance Certificate, proof of address, proof of bank account				

#### COMPILER

_____ <b>NAME AND SURNAME IN PRINT</b>	_____ <b>SIGNATURE &amp; DATE</b>	_____ <b>SCHOOL STAMP</b>
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#### PRINCIPAL

_____ <b>NAME AND SURNAME IN PRINT</b>	_____ <b>SIGNATURE &amp; DATE</b>	_____ <b>SCHOOL STAMP</b>
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#### DISTRICT COORDINATOR

_____ <b>NAME AND SURNAME IN PRINT</b>	_____ <b>SIGNATURE &amp; DATE</b>	_____ <b>REASON IF NOT APPROVED</b>
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SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

### Checklist for Principals – PHASE V

Schools are expected to: (yes/no)

1. Received applications (long and short list from SA Youth Mobi)
2. Conducted shortlisting \_\_\_\_\_ (provide the date April 2025)
3. Interview panel constructed
4. Conducted interviews by \_\_\_\_\_ (provide the date April 2025)
5. Offered contracts to candidates to sign \_\_\_\_\_ (provide the date April/May 2025)
6. Submitted names and signed contracts to the district \_\_\_\_\_ (provide the date April/May 2025)
7. Applicants reported for duty \_\_\_\_\_ (provide the date May 2025)
8. Allocate responsibilities to the appointees \_\_\_\_\_ (provide the date May 2025)
9. Completed Job descriptions for each EA and GSA \_\_\_\_\_ (provide the date May 2025)
10. Assigned mentors to EAs and GSA \_\_\_\_\_ (provide the date May 2025)
11. Conducted orientation to EAs and GSA \_\_\_\_\_ (provide the date May 2025)
12. Appointed Team Leaders from EAs and GSAs \_\_\_\_\_ (provide the date May 2025)
13. Ensured that each Assistant is attending training as per schedule provided by (tick DBE and Province
14. Ensured that each Assistant sign timesheet daily as they report for duty
15. Hold regular meetings with EAs and GSAs
16. Manage performance
17. Manage cases of misconduct aligned to the "code of conduct for Assistants Placed in BEEI – provided in framework

PRINCIPAL: \_\_\_\_\_

DATE: \_\_\_\_\_

SCHOOL STAMP

SCHOOL LOGO

NAME OF SCHOOL: \_\_\_\_\_

## CHECKLIST

### APPOINTMENT DOCUMENTS: EDUCATION ASSISTANTS AND GENERAL SCHOOL ASSISTANTS

TITLE:	SURNAME:	FIRST NAME:
ID NUMBER:	PROVINCE: WC	DISTRICT:
CIRCUIT:	SCHOOL:	EMIS:
CATEGORY:	SUB-CATEGORY:	EA PLACED AT GRADE:
EA: PLACED WHICH SUBJECT:		

NO	DOCUMENT	APPLICANT	PRINCIPAL	DISTRICT/PED
	PHASE V			
1.	Application letter			
2.	Curriculum Vitae (CV)			
3.	Testimonial			
4.	Completed Contract signed by the Employer and Employee			
5.	Job description			
6.	Code of Conduct			
7.	Certified copy of ID Document			
8.	Certified copies of qualifications			
9.	Bank Account Particulars Form – Stamped by Bank, signed by Teller inside Stamp, Signed by Educator. <i>(Please note: all changes MUST be initialled)</i>			
10.	Name clearance certificate from SAPS			
11.	Proof of current residential address:			
12.	Vetting against sexual offenses registers			
13.	Acceptance and Declaration Letter			
14.	Proof of completion of online orientation			

*It is herewith confirmed that completed forms and certified copies of all documents marked with a (✓) tick above have been provided by the applicant and received by the relevant office and are attached to this checklist*

APPLICANT			
	PRINT NAME	SIGNATURE	DATE
VERIFIED BY THE PRINCIPAL			
	PRINT NAME	SIGNATURE	DATE
VERIFIED BY THE CIRCUIT OFFICE			
	PRINT NAME	SIGNATURE	DATE
VERIFIED BY THE DISTRICT OFFICE			
	PRINT NAME	SIGNATURE	DATE

SCHOOL LOGO

Register for Training Attended – Phase V

ASSISTANT TO SIGN ONLY ON DAYS THEY ATTENDED TRAINING

ASSISTANT TO SIGN ONLY ON DAYS THEY ATTENDED TRAINING

SCHOOL LOGO

NAME OF SCHOOL:

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**APPOINTMENT LETTER OF PANELMEMBERS – PHASE V**

The following people were selected by the School Governing Body to do the Recruitment & Selection process of Phase V with the BEEI project.

NAMES	PORTFOLIO	SIGNATURE
1.	SGB	
2.	SGB	
3.	SGB	
4.	SMT	
5.	SMT	
6.	SMT	
7.	Principal	

..... PRINCIPAL

..... SGB CHAIRPERSON

School Stamp