

Robson Savage (Pty) Ltd

Manual

Prepared under Section 51 of the
Promotion of Access to Information Act
(Act 2 of 2000)

May 2021

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1. Introduction

The Promotion of Access to Information Act, Act 2 of 2000 (“PAIA”) was enacted on 3 February 2000. The purpose is to give effect to the constitutional right of access to information held by any public or private body that is required for the exercise or protection of any rights.

Where a request for information is made in terms of PAIA, the body to which the request is made is obliged to release the information, except where PAIA or other legislation expressly provides that the information may or must not be released.

Robson Savage (Pty) Ltd (“the Company”) is a “private body” as defined in PAIA, and is required to compile a manual to provide a reference as to the records held and the process which needs to be followed to access such records. The Company provides administration, actuarial, consulting and financial advisory services to retirement funds, companies, fund members and individuals.

This manual is intended to foster a culture of transparency, accountability, and good governance, by giving effect to the right to information that is required for the exercise or protection of any right and to actively promote a society in which the people of South Africa have effective access to information to enable them to more fully exercise and protect their rights.

2. Company Details

Company name	Robson Savage (Pty) Ltd
Registration number	2000/010885/07
Street address	2 Hermitage Terrace, Richmond, 2092, Johannesburg
Postal address	PO Box 3041, Houghton, 2041
Telephone number	011 643 4520
Fax number	011 643 4535
Email address	home@robsav.com
Contact person	Neil Savage

3. Guide to using PAIA

The Act requires the Information Regulator to compile a guide to be available in each official language, to assist individuals in understanding how to exercise their rights contained in the Act. The previous guide compiled by the South African Human Rights Commission is available at the Human Rights Commission’s website. In terms of Section 110 of the Protection of Personal Information Act 4 of 2013 the functions of the Human Rights Commission have transferred to the Information Regulator. The contact details are as follows:

Name	The Information Regulator (South Africa)
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Postal address	P.O. Box 3153, Braamfontein, Johannesburg, 2017
Physical address	JD House, 27 Stiemens Street, Braamfontein, Johannesburg, 2001
Telephone	+27 10 023 5200
E-mail	info@justice.gov.za

4. Legislation in terms of which information is held

Many pieces of legislation impact the Company and its operations, and hence its information-keeping requirements and activities, including but not limited to:

- Pension Funds Act, No 24 of 1956
- Income Tax Act, No 58 of 1962
- Companies Act No. 61 of 1973
- Copyright Act No. 98 of 1978
- Value Added Tax Act No. 89 of 1991
- Occupational Health and Safety Act No. 85 of 1993
- Compensation for Occupational Injuries and Diseases Act No. 130 of 1993
- Labour Relations Act No. 66 of 1995
- Basic Conditions of Employment Act No. 75 of 1997
- Employment Equity Act No. 55 of 1998
- Skills Development Act No. 97 of 1998
- Skills Development Levies Act No. 9 of 1999
- Promotion of Access to Information Act, No. 2 of 2000
- Financial Institutions (Protection of Funds) Act, No 28 of 2001
- Financial Intelligence Centre Act, No 38 of 2001
- Unemployment Insurance Act No. 63 of 2001
- Unemployment Contributions Act No. 4 of 2002
- Financial Advisory and Intermediary Services Act, No. 37 of 2002
- Protection of Personal Information Act, No 4 of 2013
- Financial Sector Regulation Act, No. 9 of 2017

5. Accessing information held by the Company

The PAIA allows, on request and on the payment of the prescribed fee, access to records of the Company, provided the records are required only for the exercise or protection of rights. Any public body lodging a request must be acting in the public interest.

PAIA defines a “requester” as being:

- any person, including, but not limited to, a public body or an official thereof, making a request for access to a record of the Company; or
- any person acting on behalf such a person

5.1. Company records access classification guide

Classification Code	Access	Classification Type
1	May be Disclosed	Public Access Document

Classification Code	Access	Classification Type
2	May not be Disclosed	Request after commencement of criminal action [s7]
3	May be Disclosed	Subject to copyright
4	Limited Disclosure	Personal information that belongs to the requester of that information [s61]
5	May not be Disclosed	Unreasonable disclosure of personal information of natural person [s63(1)]
6	May not be Disclosed	Likely to harm the commercial or financial interests of third party [s64(a)(b)]
7	May not be Disclosed	Likely to harm the Company or third party in contractual or other negotiations [s64]
8	May not be Disclosed	Would breach a duty of confidence owed to third party in terms of an Agreement [s65]
9	May not be Disclosed	Likely to compromise the safety of individuals or protection of property
10	May not be Disclosed	Legally privileged document [s67]
11	May not be Disclosed	Environmental testing / investigation which reveals public safety / environmental risks [s64(2);s68]
12	May not be Disclosed	Commercial information of Private Body
13	May not be Disclosed	Likely to prejudice research and development information of the Company or a third party [s69]
14	May not be Refused	Disclosure in public interest [s70]

5.2. Records availability

Departmental Records	Subject Matter	Classification Code
Communications / Marketing	Current product information	1
	Public Corporate Records	1,4
	Media Releases	1
	Company Web Site and App	1
Human Resources	Employee Records	4,7,8
	Company Payroll Records	4,7,8
	Employment Contracts	4,7,8
	Personnel Guidelines, Policies and Procedures	3
	Employee Medical Records	4,7,8
Financial	Audited Financial Statements	7
	Tax Records (Company & Employees)	4,7,8
	Asset Register	7
	Management Accounts	7,10
Corporate and Legal Services	General Contract Documentation	3
	Company Guidelines, Policies and Procedures	3
	Trade Marks	3
	Statutory Records	1
	Individual Client Information	4,10
Sales and Marketing	Market Information	3
	Product Brochures	1
	Product Sales Records	7,10

Departmental Records	Subject Matter	Classification Code
	Marketing and Future Product Strategies	7,10
	Customer Information and Database	7,10
Quality	Quality Records	1
Information Technology	Company Source Codes; systems customised or proprietary	12

5.3. Request procedure

The requester must use the prescribed form in terms of PAIA and submit it to the Information Officer. This request must be made to the address, fax number or e-mail address of the Company as set out in section 2 above. The form needed to apply for access to information can be found on the website www.sahrc.org.za or attached hereto.

The requester must provide sufficient detail on the request form to enable the Information Officer to identify the record and the requester. The requester should also indicate which form of access is required (for instance if the requester is blind, the access will not be via email).

The requester must identify the right that is sought to be exercised or to be protected and provide an explanation of why the requested record is required for the exercise or protection of that right.

If a request is made on behalf of another person, the requester must submit proof of the capacity in which the requester is making the request to the satisfaction of the Information Officer.

5.4. Decision

The Company is not obliged to provide the information requested, and will consider each request on its merits taking into account the structure set out in 5.1 and 5.2 above.

The Company will, within 30 days of receipt of the request, decide whether to grant or decline the request and give notice with reasons (if required) to that effect.

The 30 day period within which the Company has to decide whether to grant or refuse the request, may be extended for a further period of not more than 30 days if the request is for a large volume of information, or the request requires a search for information and the information cannot reasonably be obtained within the original 30 day-period. The Information Officer will notify the requester in writing should an extension be sought.

Should the Company decline access to the information requested, the requester may lodge an internal appeal to the board of management of the Company.

5.5. Grounds for refusal of access to information

The grounds for the Company to refuse a request for information are briefly indicated in 5.1 and 5.2 above and could include:

- 5.5.1. protection of the privacy of a third party who is a natural person, which would involve the unreasonable disclosure of personal information of that person;
- 5.5.2. protection of the commercial information of a third party, if the record contains:
 - trade secrets of that third party;
 - financial, commercial, scientific or technical information which disclosure could likely cause harm to the financial or commercial interests of that third party;
 - information disclosed in confidence by a third party to the Company, if the disclosure could put that third party at a disadvantage in negotiations or commercial competition;
- 5.5.3. protection of confidential information of third parties if it is protected in terms of any agreement or law;
- 5.5.4. protection of the safety of individuals and the protection of property;
- 5.5.5. protection of records which would be regarded as privileged in legal proceedings; and
- 5.5.6. confidentiality relating to the financial activities of the Company.

Requests for information that are frivolous or vexatious, or which involve an unreasonable diversion of resources, will be refused.

Should, after a diligent search, the record(s) requested not be found, the Company will by way of affidavit give notification that it is not possible to give the requested access.

6. Fees to obtain information

- 6.1. PAIA provides for two types of fees namely:
 - 6.1.1. A request fee, which will be a standard fee; and
 - 6.1.2. An access fee, which must be calculated by taking into account reproduction costs, search and preparation time and cost, as well as postal costs.
- 6.2. When the request is received by the Information Officer, it will by notice require the requester, other than a personal requester, to pay the prescribed request fee (if any), before further processing of the request.
- 6.3. If the search for the record has been made and the preparation of the record for disclosure, including arrangement to make it available in the requested form, requires more than the hours prescribed in the regulations for this purpose, the Company will notify the requester to pay as a deposit the prescribed portion of the access fee which would be payable if the request is granted.
- 6.4. The Company will withhold a record until the requester has paid the fees as prescribed.
- 6.5. A requester whose request for access to a record has been granted, must pay an access fee for reproduction and for search and preparation, and for any time reasonably required in excess of the prescribed hours to search for and prepare the

record for disclosure including making arrangements to make it available in the request form.

- 6.6. If a deposit has been paid in respect of a request for access, which is refused, then the Company must repay the deposit to the requester.

7. Availability of the manual

The Company's manual is available for inspection free of charge at the registered address of the Company and on the Company's website.

Adopted as the PAIA Manual of Robson Savage (Pty) Ltd as envisaged under the Promotion of Access to Information Act.

Director

Skye Hartog

Name

Date

Information Officer

Neil Savage

Name

Date