



NOTES

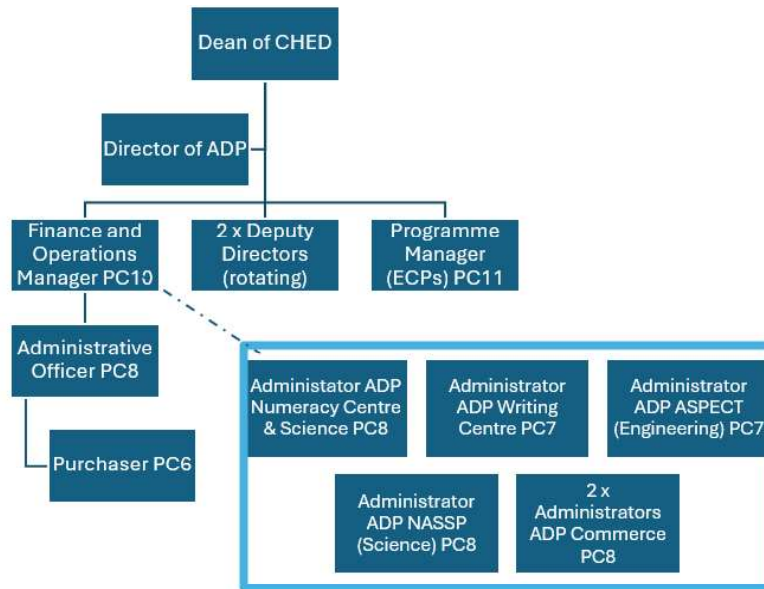
- Forms must be downloaded from the UCT website: <http://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

POSITION DETAILS

Position title	Finance and Operations Manager: Academic Development Programme		
Job title (HR Business Partner to provide)			
Position grade (if known)	PC 10	Date last graded (if known)	May 2015
Academic faculty / PASS department	Centre for Higher Education Development		
Academic department / PASS unit			
Division / section	Academic Development Programme		
Date of compilation	2015-05-21 (Updated 17 April 2024)		

ORGANOGRAM

(Adjust as necessary. Include line manager, line manager’s manager, all subordinates and colleagues. Include position grades)



ADP is a large and complex department which consists of a Central office, two centralised cross-faculty units and five de- centralised faculty-based units. The department employs 50 academics (42 permanent and 8 on contract) and 11 PASS staff. The position described manages processes and operations centrally and in the faculty units on the University’s Main, Middle and Health Sciences Campuses.

PURPOSE

The Finance and Operations Manager is responsible for managing the financial, operational, and administrative processes and systems within the Academic Development Programme at the University of Cape Town. This role is crucial in ensuring the department's financial sustainability, accountability, and efficiency, with a strong focus on supporting the ADP's teaching, learning, and research missions. Because of ADP's size and the de-centralised nature of most of its units the position involves managing processes and operating systems across a complex network that encompasses ADP's central and faculty-based units, other departments in CHED, faculty managers and other administrative staff in faculties. The position also involves a strong coordinating and oversight role of administrative staff in central ADP and the ADP units, staff in central administrative departments such as Central Finance, HR, and external role players such as institutional auditors as required.

CONTENT

Key performance areas	% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
E.g. General and office administration	25%	Takes, types up and distributes minutes and agendas for monthly departmental meeting. Greets visitors, enquires as to the nature of their visit and directs them to the appropriate staff member.	All staff members receive an electronic copy of accurate minutes and agendas, in the departmental template/format, a week before
1 Operational Management and Administration	30%	<p>Managing the administrative work of central ADP office and major administrative activities in the faculty-based units. This includes:</p> <ul style="list-style-type: none"> • Representing ADP on the CHED Ops Mag • Managing the dissemination of decisions taken and coordinating action steps outlined at the CHED Ops Mag across ADP's central and de-centralised units. • Ensuring that administrative systems remain functional and that office systems are maintained. • Supporting, liaising with and mentoring Faculty-based administrative staff. • Liaising with other CHED departments and UCT's central administration regarding all matters related to administration. • Facilitating and managing communication between relevant staff. • Oversee the development, compilation and maintenance of documentation of ADP processes and procedures <p>Seeking and implementing means of rationalising, streamlining and improving the effectiveness of administrative processes and systems used in the ADP by:</p> <ul style="list-style-type: none"> • Seeking efficiencies through use of digital technology and other means. • Identify and implement process improvements to enhance operational efficiency. • Develop and maintain standard operating procedures (SOPs) for key processes. <p>Line managing the ADP's central unit's administrative staff by:</p> <ul style="list-style-type: none"> • Setting tasks and expectations clearly. • Providing training on systems and processes. • Monitoring and evaluate staff performance to ensure alignment with unit objectives. • Managing the Performance process of the administrative assistant. • Employee relations: assist staff within the Central unit with complaints related to work or interpersonal issues. Advise on avenues to take the complaint forward or ways to resolve internally. Remain impartial and supportive and ensure senior management are aware of potential problems while managing the necessary confidentiality issues. <p>Assisting unit heads with the Performance appraisal process of administrative assistants in the seven ADP units by:</p> <ul style="list-style-type: none"> • Providing information on assistants' performance of administrative duties managed and coordinated by the ADP Central office. <p>Systems Management:</p> <ul style="list-style-type: none"> • Oversee the implementation and maintenance of administrative and financial systems. • Ensure systems are effectively integrated and utilised across the Central and ADP units. 	<p>Ensures that the administrative work agenda is correctly scheduled and that the schedule is observed.</p> <p>Keeps up to date with UCT administrative processes and policy.</p> <p>Reflects critically on systems and processes with a view to bringing about improvements.</p> <p>Liaises effectively with relevant staff in the PASS departments and Faculties.</p> <p>Ensures that administrative systems remain functional.</p> <p>Ensures that performance appraisal processes in the ADP units are well-informed.</p> <p>Takes a leadership role among administrative staff across the ADP.</p> <p>Foster a positive work environment and address employee concerns effectively.</p>

2	Financial management	30%	<p>Risk Management:</p> <ul style="list-style-type: none"> Identify and mitigate operational and financial risks for the ADP unit Ensure compliance with university policies, legal requirements, and best practices. <p>Physical space Management:</p> <ul style="list-style-type: none"> Oversee the management of ADP space allocation and maintenance. Ensure coordination with property and services facilities management for repairs and maintenance. <p>Providing the ADP Director with ad hoc information on request, in an appropriate and user-friendly format.</p>	
			<p>Monitor, control and report on income and expenditure for ADP, its seven constituent units and its projects, recommending action where required, and acting on the authority of the Director</p> <ul style="list-style-type: none"> Preparing reports on actual expenditure against plan and report on variances on funds to the Director and unit heads. Provide accurate financial forecasts and variance analysis. Working directly with the unit heads and administrative assistants on monitoring budgets, income and expenditure throughout the year, and providing assistance as necessary. Investigating anomalies and making recommendations on appropriate action. Mentoring and coaching the units' administrative assistants on financial administration and related matters. Monitoring the payroll and related processes Ensuring compliance to UCT and CHED financial policies and processes <p>Facilitating financial management, monitoring, control and reporting on donor funding (non-GOB and research)</p> <ul style="list-style-type: none"> Assist with the development of business plans accompanying applications for grants and donations. Prepare financial reports on grants and donations for sponsors. Advise on funder requirements and compliance to UCT and CHED policies Monitor receipt of revenue from donors. Train all staff on UCT financial processes and policies and updating them when there are changes 	<p>Ensures sound and transparent financial management of the ADP by:</p> <ul style="list-style-type: none"> producing regular reports on all ADP units checking income and expenditure against plan reporting on anomalies and significant variances taking appropriate action authorised by the Director monitoring financial reports, funds and cost objects across ADP. <p>Ensures financial coordination across ADP by:</p> <ul style="list-style-type: none"> providing assistance to unit heads and administrative assistants as required communicating effectively with unit heads and administrative assistants.

		<p>Plan and implement effective financial controls by:</p> <ul style="list-style-type: none"> • Devising, implementing and managing effective financial systems and processes for accurate funds management, reporting and compliance. • Providing guidance and support in terms of UCT financial policies, procedures and compliance. • Ensuring that financial deadlines are adhered to. • Taking responsibility for reviewing and checking all financial transactions such as journal transfers, receipting of income, purchase orders, Pcard transactions, reimbursements, etc • Devising a central system for record keeping that is accessible to central unit staff. Delegating tasks to the ADP administrative assistant as appropriate. • Setting up and maintaining funds and cost centres for ADP units and staff (e.g. hierarchies, dormant funds, opening new funds non-gob or research). • Liaising with CHED Finance to resolve finance matters and queries. <p>Assisting the CHED Finance Manager and Assistant Finance Manager in resolving financial/funding queries related to ADP business.</p> <p>Providing mentoring to ADP administrative staff on financial processes as requested</p>	<p>Produces accurate financial data for budget presentations, business plans, grant applications and reports to donors.</p> <p>Conducts routine financial transactions in accordance with scheduled programme.</p> <p>Ensures smooth financial functioning in CHED through assistance to Finance Manager and mentoring of fellow administrative staff on financial processes</p>
3	Financial planning and budgeting	<p>Responsible for preparing and managing the annual budget process in ADP and making budget recommendations in conjunction with the ADP Director</p> <ul style="list-style-type: none"> • Creating, advising and guiding the ADP Director and seven ADP unit heads to shape their budgets and assist in understanding general budgeting principles, terminology and formats. • Liaising with the CHED Finance Manager, the ADP Director and seven ADP unit heads to plan and execute the annual planning and budgeting cycle. • Preparing all data required for ADP's planning and budgeting process, which involves: <ul style="list-style-type: none"> ▪ covering the budget plans of ADP's central unit, two cross-faculty centralised units and five Faculty-based units; ▪ informing the process by keeping and utilising complete quantitative and narrative records from previous planning and budgeting cycles; ▪ developing and maintaining detailed spreadsheet-based budget drafts to facilitate decision-making, drawing on data from SAP. • Creating, advising, guiding and preparing the ADP annual budget and making recommendations to the Director on the optimal use of ADP's financial resources, particularly the ADP's investment funds and external grants and donations. • Working with the seven ADP unit heads and administrative personnel to develop the units' staffing and operating budget proposals, for negotiation with and approval by the ADP Director. • Capturing the ADP's budget proposals on SAP and working with the CHED Finance Manager and ADP Director on final adjustments before and after budget decision-making by the Executive and Council. 	<p>Maintains comprehensive quantitative and narrative records that facilitate planning and budgeting.</p> <p>Ensures availability of full and accurate sets of data required for planning and decision-making on budget proposals.</p> <p>Produces planning and budgeting data in a form that is readily understood by the Director and unit heads and facilitates decision-making.</p> <p>Presents options and makes recommendations on the optimal use of resources as requested.</p> <p>Sets up and maintains communication between the ADP Director and the unit heads on budget proposals.</p>

		<p>Work in conjunction with CHED Finance in providing assistance and guidance to ADP staff about non-gob and research budgets by:</p> <ul style="list-style-type: none"> • Guiding staff through the internal and UCT processes for applying for funding • Ensuring compliance to CHED and UCT policies and processes (e.g. direct and indirect cost recovery, etc) • Escalate complex research and non-GOB financial requirements to CHED finance and CHED HR to mitigate risk • Assist staff in preparing budgets for non-gob and research proposals and projects • Liaise with HOD, Director, Finance and HR to ensure compliance <p>Monitor the ADP's major investments, grants, and donated funds to guarantee that the associated positions and activities are financially sustainable for the necessary duration in conjunction with the ADP Director</p> <p>Financial administration of the Department of Higher Education and Training Foundation Provision Grant in conjunction with the ADP Programme Manager and ADP Director</p> <p>Financial management of the Foundation Provision Grant by:</p> <ul style="list-style-type: none"> • Ensuring that grant funding is timeously received into the fund • Ensuring that disbursements are made to faculties in consultation with PM • Ensuring that foundation training is spent in accordance with DHET rules • Ensuring proper financial monitoring, control and reporting are in place <p>Assist the Programme Manager with coordinating data collection and reporting processes for the annual UCT's Foundation Grant audit and Report by:</p> <ul style="list-style-type: none"> • Requesting staffing data from central finance. • Preparing financial data and submitting to PM for auditing. • Attending to audit queries as necessary and providing supporting documents requested. • Prepare a DHET reporting template for PM and FM to review. • Collating financial and staffing data in DHET's reporting template. • Liaising with Central Finance and UCT's external auditors as required. • Assisting the Programme Manager with providing information for UCT's Annual Performance Plan and Progress Reports with a focus on financial expenditure. 	<p>Ensures that budget proposals are captured on SAP in compliance with all protocols.</p>
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4	<p>HR-related administration and management</p>	15%	<p>Overseeing HR transactional work relating to ADP staff, including</p> <ul style="list-style-type: none"> • Oversee central unit staff's recruitment, onboarding, and performance management. • Supervise Central unit administrative staff. • Oversee the delivery of departmental events, meetings, and communications. • Ensure compliance with UCT HR policies and procedures • The administration of the renewal of contracts. • The management of ad hoc payments. • Liaising with ADP unit heads and administrative staff on transactional work. • Record keeping. • Resolving salary related queries. <p>Being the first point of liaison with the HRBP Officer and Administrator on ADP-related processes or issues, including:</p> <ul style="list-style-type: none"> • Working closely with HRBP to facilitate accuracy of HR's records in relation to ADP. • Gathering and analysing data for skills development plan. • Assisting with the annual audit of PeopleSoft rights <p>Coordinating the performance management processes for academic and PASS staff across ADP by:</p> <ul style="list-style-type: none"> • Liaising with the Dean's Office about procedures and deadlines. • Answering, following up and referring staff queries. • Collating and handing in relevant documents. 	<p>Ensures that all HR processes and functions relating to ADP staff are carried out timeously and in accordance with UCT HR policy.</p> <p>Ensures that documentation, particularly that relating to staff appointments and payment, is correctly channelled in the interests of efficiency and respect for employees.</p> <p>Administers staff recruitment and selection processes.</p> <p>Ensures that accurate staff and other HR records are complete and up to date.</p> <p>Ensures that performance management documentation is completed and processed.</p> <p>Communicates with unit heads and their staff.</p>
5	<p>Communications</p>	5%	<p>Ensure effective internal communications, in cooperation with the ADP leadership team</p> <p>Ensuring effective external project communications</p> <ul style="list-style-type: none"> • Coordinate the processes for the compilation of the ADP component of Annual University reports such as the CHED Annual Report and the Research Publication Report • Contribute to the ADP marketing and communication strategy and undertake activities where possible. • Website updates • Upload curated material. 	

MINIMUM REQUIREMENTS

Minimum qualifications	<ul style="list-style-type: none"> Grade 12; An appropriate NQF 6 qualification 			
Minimum experience (type and years)	<ul style="list-style-type: none"> 6 years of relevant general and financial administration experience in a Higher Education environment at departmental level. Experience in studying, interpreting and implementing policy. Experience of the HEMIS system. Sound knowledge of UCT administrative policies and procedures. Sound IT knowledge and skills covering Microsoft Office, basic databases, email and web browser. Demonstrated quantitative and financial administration skills at the appropriate level. 			
Skills	<ul style="list-style-type: none"> 6 years of relevant general and financial administration experience in a Higher Education environment at departmental level. Experience in studying, interpreting, and implementing policy. Experience of the HEMIS system. Sound knowledge of UCT administrative policies and procedures. Sound IT knowledge and skills covering Microsoft Office suite especially Excel, basic databases, SAP, Drupal, Cloud applications. Interpersonal; financial management; problem solving; organizational; communication; multi-tasking; and staff management skills. 			
Knowledge	Financial management, financial planning and budgeting, financial processes, financial administration of grants and budgets (GOB and non-GOB), UCT policies, HR administration,			
Professional registration or license requirements				
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Ability to handle cash or finances.)	Ability to handle cash or finances			
Competencies (Refer to UCT Competency Framework)	Competence	Level	Competence	Level
	Analytical thinking/problem solving	3	Individual leadership	2
	Resource management	2	University awareness	3
	Building partnerships	2	Conceptual thinking	2
	People management	2	Communication, spoken and written	3

SCOPE OF RESPONSIBILITY

Functions responsible for	Financial management, financial planning and budgeting, financial processes, financial administration of grants and budgets (GOB and non-GOB), UCT policies, HR administration,
Amount and kind of supervision received	Very little – Supervision (checking in at a high level) mostly with line manager, but works mostly independently and according to UCT's financial and HR guidelines
Amount and kind of supervision exercised	Direct line management of the Administrative Officer who line manages the department's senior secretary, and overall responsibility for administration processes carried out by all ADP administrative staff.
Decisions which can be made	Can make financial decisions within UCT's financial guidelines, with the usual practice being that the director is always kept informed.
Decisions which must be referred	Decisions which fall outside of the normal operating processes.

CONTACTS AND RELATIONSHIPS

Internal to UCT	Faculty managers, IPD, departmental heads,
External to UCT	DHET, auditors

AGREED BY

	PRINT NAME	SIGNATURE	CONTACT NO.	DATE
Position Holder				