

**NOTES**

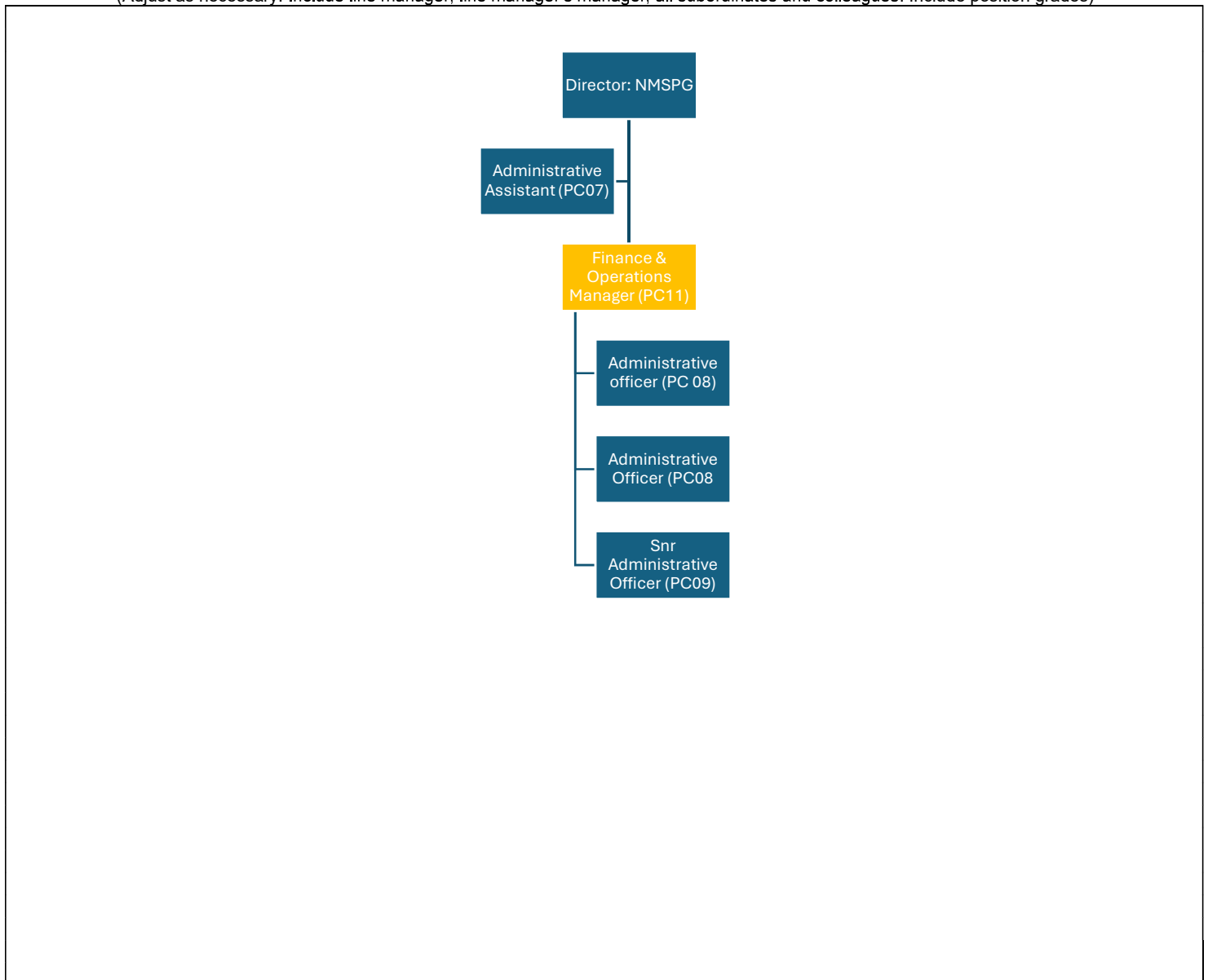
- Forms must be downloaded from the UCT website: <https://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

**POSITION DETAILS**

Position title	Finance & Operations Manager		
Job title (HR Business Partner to provide)			
Position grade (if known)	PC11	Date last graded (if known)	
Academic faculty / PASS department	Commerce Faculty		
Academic department / PASS unit	Nelson Mandela School of Public Governance		
Division / section	N/A		
Date of compilation	October 2024		

**ORGANOGRAM**

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



## PURPOSE

The main purpose of this position is to support the Nelson Mandela School of Public Governance to ensure that the Director is given the highest quality support with respect to:

- Financial planning aligned to the School's goals
- Financial management of grants and funds
- Financial risk management, compliance and reporting
- Management of HR operations and logistics
- Maximising opportunities for partnership development and stakeholder engagement as per the School's goals

**CONTENT**

Key performance areas	% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
1 Financial management	40%	<ul style="list-style-type: none"> <li>Oversee the preparation of financial statements and ensure accuracy and compliance with UCT policies and relevant regulations</li> <li>Develop model budget formats for projects</li> <li>Manage accounts payable, accounts receivable and payroll functions</li> <li>Monitor cash flow and manage banking relationships</li> <li>Draft financial reports as needed (quarterly and annually)</li> <li>Ensure compliance with all financial regulations and UCT policies</li> <li>Conduct risk assessments and implement mitigation strategies</li> </ul>	<ul style="list-style-type: none"> <li>Programme budgets created for each programme</li> <li>Review programme budgets</li> <li>Understand the systems and communicate with stakeholders in terms of what is required for payments to be done promptly and internal controls set up for the School</li> <li>Create financial reporting systems for ease of auditing processes</li> <li>Draft quarterly and annual financial reports</li> <li>Costing template workings and negotiations with Commerce Faculty</li> </ul>
2 Financial planning and strategy	20%	<ul style="list-style-type: none"> <li>Develop and implement financial strategies and sustainability aligned with the School's goals</li> <li>Prepare and manage budgets, forecasts and financial models</li> <li>Provide financial analysis and reports to support decision-making</li> <li>Work with the Director, Communications Manager and relevant team members to support fundraising activities by drafting or commenting on budgets for fundraising proposals as appropriate.</li> <li>Develop and manage a fundraising pipeline in consultation with the Director, Communications Manager and relevant managers within Academic, Research and Exec Ed teams</li> <li>Assist in identifying potential donors &amp; contribute to the update of the donor database</li> <li>Coordinate the development and updating of a strategic plan for development of the School, in conjunction with the Director and other staff, as appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>Monthly financial report to the Director</li> <li>Monthly funding status report to the Director</li> <li>Create and review proposal budgets</li> <li>Prepare financial strategy and participate in strategic planning meetings</li> <li>Database of donors updated and monitored</li> <li>Participate and attend strategic planning meetings</li> </ul>
3 Grant & Fund management	20%	<ul style="list-style-type: none"> <li>Oversee the financial management of grants and funding received by the School</li> <li>Ensure accurate and timely reporting to donors and funding bodies as per the stipulated contracts.</li> <li>Monitor opening and closure of project funds as required</li> <li>Hold monthly meetings with managers responsible for projects related to grants</li> </ul>	<ul style="list-style-type: none"> <li>Review received project grants and expenditure against deliverables</li> <li>Monthly fund check reports and reviews</li> <li>Convene meetings and Communicate with programme managers re status of project grants</li> <li>Donor financial reporting</li> </ul>
4 Stakeholder engagement	5%	<ul style="list-style-type: none"> <li>Engage with internal and external stakeholders to enhance financial processes and ensure customization of financial reporting</li> <li>Represent the School in financial discussions and negotiations on various committees across the university</li> </ul>	<ul style="list-style-type: none"> <li>Financial processes and reporting aligned to University systems, standards and policies</li> <li>Consistent work relationship &amp; engagement with various financial units/teams within the university</li> </ul>

5	Staff Management	5%	<ul style="list-style-type: none"> <li>• Lead and develop the finance team, fostering a culture of excellence and continuous improvement</li> <li>• Provide mentorship and training to finance staff</li> <li>• Manage performance of the teams</li> <li>• Conduct thorough workforce planning to meet the needs of the School</li> <li>• Consolidate, assess and develop an annual resource requirement plan, including personnel and other resources</li> <li>• Coordinate the UCT performance appraisal system</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate the UCT performance appraisal system</li> <li>• Oversee processes for recruitment, appointments and staff development dialogues</li> <li>• Succession planning updates and meetings with Director</li> <li>• Staff dialogue spreadsheets completed and communications sent and coordination of meetings and liaise with HR Client Service Manager</li> <li>• Staffing reports for the Director on a quarterly basis</li> <li>• Staff training plan compiled and submitted to Director and Faculty office</li> </ul>
	HR Administration	5%	<ul style="list-style-type: none"> <li>• Line manage the administrative staff – logistics, reception, finance – as well as assist with prioritization of tasks</li> <li>• Provide support in HR functions such as recruitment, onboarding when necessary</li> <li>• Collaborate with HR department to ensure compliance with HR policies</li> <li>• Develop and maintain an HR information system to monitor and track HR information such as contract data, leave etc.</li> <li>• Advise line managers about induction, performance management and other staffing related issues</li> <li>• Coordinate recruitment process for new appointments, in collaboration with the respective managers and Director and UCT HR Department</li> </ul>	<ul style="list-style-type: none"> <li>• Manage compliance with UCT procedures and policies relating to employment and conditions of service, health and safety etc</li> <li>• Alert the line managers and Director timeously about the end of current appointments and need for extensions or advertisement of positions</li> <li>• HR, operations and administrative manual for the School</li> <li>• Advise all management concerning recruitment guidelines</li> <li>• Job adverts done and all committee members communicated with an recruitment completed and related forms</li> </ul>
6	Operations	5%	<ul style="list-style-type: none"> <li>• Oversee office allocations and overall management of the facilities of the School</li> <li>• Ensure that issues of importance or interest to the School arising from the meetings of these structures are circulated to appropriate people on the School staff team</li> <li>• Monitor the transformation plans of the School against the Faculty requirements</li> <li>• Support organising of monthly staff meetings; coordinate the agenda and ensure timely production and circulation of meeting minutes</li> <li>• Report to the Director via management team meetings</li> <li>• Support representation of School on faculty and university structures in consultation with the Director</li> </ul>	<ul style="list-style-type: none"> <li>• Convene administrative team meetings – weekly with each team</li> <li>• Attend the monthly staff meetings</li> <li>• Report on the transformation plans</li> <li>• Participate, as and when necessary, in management team meetings</li> <li>• Attend meetings on behalf of the School</li> <li>• Circulate minutes or notes from meetings</li> <li>• Convene programme managers meeting regularly</li> </ul>

### MINIMUM REQUIREMENTS

Minimum qualifications	NQF 8: in Finance, Accounting or a related field Professional accounting qualification (CA(SA), CIMA, ACCA) preferred			
Minimum experience (type and years)	<ul style="list-style-type: none"> <li>• Minimum of 5 years' experience in a senior financial management role, preferably within a higher education institution</li> <li>• Strong knowledge of financial regulations, accounting standards and compliance requirements in an academic institution</li> <li>• Proven experience in budgeting, financial planning and analysis</li> <li>• Ability to perform HR-related tasks</li> <li>• Proven experience successfully managing a team of specialists</li> <li>• Excellent leadership, communication and interpersonal skills</li> <li>• Track record of managing donors/stakeholder relationships</li> <li>• Experience developing a fundraising pipeline</li> </ul>			
Skills	<ul style="list-style-type: none"> <li>• Strategic thinking and problem-solving abilities</li> <li>• High level of integrity and ethical standards</li> <li>• Proficiency in financial management software and tools</li> <li>• Strong organisational and time management skills</li> <li>• Ability to work effectively in a team and manage multiple priorities</li> </ul>			
Knowledge	<ul style="list-style-type: none"> <li>• Processes for undertaking financial planning and developing financial strategy</li> </ul>			
Professional registration or license requirements	Professional accounting qualification (CA(SA), CIMA, ACCA) preferred			
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Ability to handle cash or finances'.)				
Competencies (Refer to <a href="#">UCT Competency Framework</a> )	Competence	Level	Competence	Level
	Analytical thinking	2	Resource management	2
	Communications	2	Conceptual thinking	2
	Teamwork/collaboration	2	Decision making/judgement	2
	Creativity and Innovation	2	People management	2

### SCOPE OF RESPONSIBILITY

Functions responsible for	Financial planning and strategy; financial management, compliance and risk management, grant and grant fund management, human resource support, team leadership and development, stakeholder engagement with committees/institutions related to financial processes within and external to UCT
Amount and kind of supervision received	Type, format and frequency of financial reporting will be agreed upon with the Director and senior management within the School. Financial reports will be reviewed and discussed with sign off from the Director or delegated senior manager prior to submission. HR development dialogues to be discussed with the Director prior to submission.
Amount and kind of supervision exercised	Manages administrative staff (logistics, reception and finance)
Decisions which can be made	Structure of the financial reports aligned to the needs of donors and information required by the Director for planning purposes; Format in which financial considerations are reflected within programmatic proposals; Tools for assisting with the analysis of forecasting and financial planning
Decisions which must be referred	Sign off relating to contractual obligations; Decisions relating to accessing of investment funds; approval of expenditure above a specified threshold as determined by the Director

### CONTACTS AND RELATIONSHIPS

Internal to UCT	Finance & Ops Manager, HOD, Executive Education Programme team, NMSPG research teams, the Academic Team, and Contracts & research offices, DAAD office, Debtors, Creditors, HR, and Commerce Faculty Finance Team
External to UCT	Donors and partners or other external stakeholders such as consultants or external faculty.

### AGREED BY

	PRINT NAME	SIGNATURE	CONTACT NO.	DATE
Position Holder				