HR191	**POSITION DESCRIPTION**	UNIVERSITY OF CAPE TOWN IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD

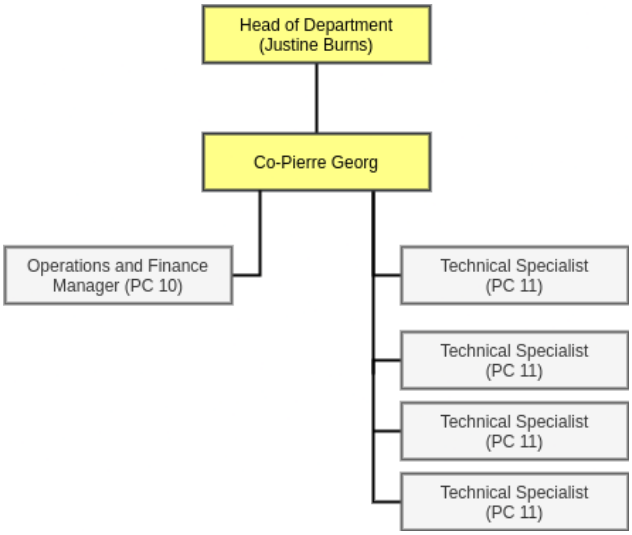
NOTES

- 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	Operations and Finance Manager		
Job title (HR Practitioner to provide)	Operations and Finance Manager		
Position grade (if known)	PC10	Date last graded (if known)	
Academic faculty / PASS department	Commerce		
Academic department / PASS unit	School of Economics		
Division / section			
Date of compilation	2021-07-08		

ORGANOGRAM



PURPOSE

The main purpose of this position is to ensure that the logistics and operations of the unit are efficiently managed as well as ensuring that the projects are given the highest quality support in order to deliver on their objectives. The incumbent will be responsible for managing the Human Resource processes, Operations, Finance, Physical Resources and Administration of the unit and ensuring that all the projects are compliant with the university policies and processes.

A major component of the role is to design and implement excellent financial processes for all projects and to oversee project finances. This includes the development of high-level risk mitigation strategies in order to ensure financial security for the unit and the Director.

Another key component is to ensure good, timely project reporting both within the unit and to the funders.

CONTENT

Key performance areas		% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
1	Operations Management and Strategic Planning	30%	- Develop and implement operational strategies for the unit and its projects - In consultation with the Directors, articulate the unit's medium- and long-term objectives and, where necessary, re-design the unit's operational systems to support the achievement of these objectives - Develop and manage an annual resource plan for the unit; this includes personnel, space, facilities and equipment - Representation on faculty and university structures. - Event management - Assess and report on operation performance on an ongoing basis. Challenge basic assumptions underlying operations. Act as a sounding board for Director, Deputy Director and Project Leads	- Effective systems to support the unit and its projects - Compliance with all relevant policies, protocols and procedures - Operational plans and changes are clearly communicated to all staff - Work directly with all relevant core and project administrators to ensure all changes implemented - Participate in and attend strategic planning meetings, leading discussions of operational matters - Lead and organise key organisational events, using the skills of the project and administrative team. - Ensure that issues of importance or interest to the unit are circulated and processed accordingly
2	Financial Management	40%	<u>Core Finances</u> - Develop and maintain a high-level operational budget aligned with the strategic plan. - Develop and revise long-term financial sustainability plans / strategies, with the Director - Design and maintain a financial management system in line with UCT processes. - Assess and develop an annual resource requirement plan, develop long-term sustainability strategies to ensure continued financial viability for the unit. <u>Project Finances</u> - Monitor and analyse project finances to allow early intervention on budgetary issues - Prepare accurate and timely financial reports for projects - Liaise with PI's and relevant stakeholders regarding the financial status of project funds. - Integrate project finances and budgets into an aggregate - Present project financial reports to the Director highlighting activity in the projects, specifically relating to financial health and risk. - Authorise and coordinate all financial activities, such as procurement, funds movements, opening and closing of funds, etc. – within the policies and procedures of the university.	- Hold regular meetings with the Director on finances and budget - Monitor and evaluate the unit's operational budget - Put in place long-term financial sustainability plans - Manage the unit's cash flow, through forecasting and expense monitoring. - Clear and accurate account keeping - Adequate risk mitigation within the overall budget and within each project's budget - Report to the Director on the unit's overall financial position and alert him to any financial issues requiring action on his part - Budget variances are signalled well in advance - Monitor projects financially sustainability and mitigate any financial risk to the unit. - Process disbursements to researchers, contracts and bursary holders of appropriate payments against approved budget line items - Timely project financial reporting to Project Leads - Professional engagement with international and local stakeholders and funders

3	Project and Contract Management	20%	- Planning for and supporting the needs of the projects from the proposal stage to the lifecycle of the projects to their closure - In consultation with project leads, develop project budgets and any other requirements for project proposals - Develop and maintain an internal project monitoring system in order to minimize exposure in financial, reputational, contractual, physical and other operational risks. - Review contracts to ensure terms and conditions are operationally viable by liaising with project leads. - Manage stakeholder relations (intra-institutional and external) - Ensure reporting requirements are fulfilled timeously. - Identify risks to the unit and projects, mitigate and manage risk appropriately - Challenge policies and guidelines which do not support the effective management of projects - Manage project milestones and liaise with PI's and external stakeholders regarding deliverables	- Work closely with UCT Contract's Office throughout the proposal and contract phases to ensure that contracts are in drawn up in the interest of the university and the funding organisation. - All necessary costs are included in project budgets. Complete cost recovery process for new project proposals - contracts are in place in order for projects to achieve deliverables timeously. - Timely reporting to project leads and funders. - Relationships with all relevant stakeholders are maintained - Risks are identified, mitigated and managed.
4	Human Resource Management	10%	- Evaluate recruitment needs for the unit and projects, motivating for staff adjustments and supporting the hiring processes for the unit. - Hire, manage and develop the operational/administrative team - Manage performance of administrative staff and take responsibility for performance reviews. - On behalf of the Director, liaise with project leads regarding performance management of the project staff. - Management of HR logistical and general administrative activities regarding the hiring and employment relationships of the unit's staff - Manage employment relations (grievance, discipline and conflict resolution) - Develop and maintain an HR information system to monitor and track HR information such as contract data, employment documentation, etc. - Provide support to line managers regarding UCT HR requirements and processes, remaining abreast of labour relation regulations and changes in UCT processes.	- Recruitment needs are identified and managed. - Mitigate any employee relations risk to the unit. - Productive and efficient administrative team, reflecting a positive outlook in their performance appraisals. - PI's/Project leads implement performance management systems with their teams on time. - Staff dialogue spreadsheets completed and communications sent; the coordination of meetings; - Ensure that the unit as a whole is complying with HR requirements and meeting deadlines.

MINIMUM REQUIREMENTS

Minimum qualifications	NQF7 qualification
Minimum experience (type and years)	Minimum of 5 years relevant work experience, which includes the following Experience in systems development, systems redesign and implementing system changes Experience in providing contract management support; and managing donors/stakeholder relationships Proven experience in financial management of large budgets; including reporting, budget creation and financial systems Strong organisational, planning skills Experience with multiple projects, stakeholders and funders Experience managing a team Excellent verbal and written communication skills coupled with sound interpersonal skills Proven computer literacy in the use of MS Office, with a focus on budget and financial modelling using MS Excel at an advanced level The ability to work under pressure with meticulous accuracy in a deadline driven environment Possess a high level of honesty and integrity in handling cash and finances
Skills	Project management Stakeholder engagement Contract management Operations management Problem solving and critical thinking Financial planning, Analysis and Reporting Managing teams and resources Business report writing HR management Operational management Strategic planning People management and diplomacy
Knowledge	Excellent communication skills and ability to interact with people at all levels Competence in planning and organizing events Track record of managing donors/stakeholder relationships Budgeting and Financial Management Knowledge of SAP R3 or equivalent Understanding of financial procedures Knowledge of UCT's financial and contractual processes and procedures
Professional registration or license requirements	None
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Honesty to handle cash or finances'.)	Honesty to handle finances

Competencies (Refer to UCT Competency Framework)

Competence	Level	Competence	Level
Analytical thinking	3	Initiating action / initiative	3
Building Interpersonal Relationships	3	People Management	3
Client service and support	3	Planning and organizing / work management	3
Communication	3	Results focus	3
Decision Making	3	Resource Management	3

	Facilitating change	3	University Awareness	3

SCOPE OF RESPONSIBILITY

Functions responsible for	Operational management/Financial management/ Financial and Business Reporting/ Administration Oversight/ Human and Physical Resource Planning and support/ Strategic Planning Support/ Decision-making and Management/ contract management
Amount and kind of supervision received	Minimum supervision in terms of operational decisions that have an effect on the unit. Works with Directors regarding strategic decisions.
Amount and kind of supervision exercised	Direct line manager to SALDRU operations/administration team. Coordinates and manages the operational needs of the unit.
Decisions which can be made	Operational management, project management matters, fund holder approvals, report management, people management matters, budget monitoring and stakeholder engagement
Decisions which must be referred	Overall strategic decisions for the unit. Decisions requiring the approval/consultation with the Director.

CONTACTS AND RELATIONSHIPS

Internal to UCT	• School of Economics HoD and Departmental Manager, • Commerce Faculty Office (The Dean and the Finance department), • Research contracts, DAD (Development and Alumni Department), • All Finance related departments, (Treasury, Procurement and Payment), • HR departments • Other research units
External to UCT	• Donors, external funders (local and international), funder liaisons (local and international), • Government officials, • Auditors, • Service providers

COMPLETING A POSITION DESCRIPTION
HR191

When do I use this form?

A position description is the basis of the employment contract between UCT and a staff member. It describes:

- the purpose of the position
- the position content
- where the position fits into an organisational structure
- the principal accountabilities, roles and responsibility of the position holder
- the minimum requirements needed of the position holder

A position description must be completed for all positions at UCT, both academic and PASS.

This form is completed, or reviewed and amended, when:

- a position is new, before recruitment
- substantive functions are added or removed from a position
- the position holder is new

This form is used as the basis for:

- recruitment
- performance management
- performance development

Note

- This position description informs many other human resources and people management processes.
- This position description is a living document and must be reviewed and updated regularly, preferably every 3-4 years.
- This position description is a summary of the typical functions of the position, but is not an exhaustive or comprehensive list of all possible position tasks and duties. UCT is entitled to instruct the position holder to carry out additional duties or responsibilities, which may fall reasonably within the ambit of the position description, or in accordance with operational requirements.

How do I complete this form?

- The position description indicates the requirements of the position in relation to the organisation, not the person. Describe the position, not the position-holder.
- The position description describes the position, not the performance required.
- The position description denotes a clear description of the position that is observable.
- Describe the position as is, not as imagined or as it could or should be done.
- Assume proper and competent performance of the position -holder.
- Examine typical incidents that occur in the position. Disregard any unlikely events or once-off incidents.
- Give careful consideration to employment equity legislation and take great care not include anything that could be deemed as discriminatory.

Complete all fields as follows:

Position title	The label or name of this position. Consideration is given to other titles in the department and to standard UCT position naming conventions. The latter are obtainable from your HR Practitioner, from the UCT Jobs Catalogue.
Job title (HR Practitioner to provide)	The SAP position title of this post. Obtainable from your HR Practitioner, from the UCT Jobs Catalogue.
Position grade	The current position grade of this position, if it exists (if known).
Date last graded	The date on which the position was last graded, if it has been graded (if known).
Academic faculty / PASS department	The academic faculty / PASS department in which the position sits.

Academic department / PASS unit	The academic department / PASS unit in which the position sits.
Division / section	The division / section in which the position sits.
Date of compilation	The date on which the position description was compiled, updated or reviewed.
Organogram	The departmental structure and reporting lines of the position, with the grades of these positions. Include line manager, line manager's manager, all subordinates and colleagues.
Purpose	A summary of the position which describes the overall purpose, function or role of the position. No more than two or three sentences. Clearly distinguishes the position from other positions, and links the position to the objectives of the faculty, department and university. Begins with the words: "The purpose of the position is ..."
Key performance areas (KPA)	A list of the most visible actions, essential functions, key areas of responsibility or high- level responsibilities. Provides broad categories of tasks and activities. List in order of importance or time spent. KPAs must support the organization's goals, and be within the position-holder's influence. Full time staff members have between five and eight KPAs.
% of time spent	The percentage of time spent on each key performance area.
Inputs	A list of the particular projects or groups of responsibilities, activities, processes and tasks, linked to a KPA that the position must achieve. Describes how the key performance area is performed by outlining the methods, decision processes, judgments, techniques, tools used. Write in a clear, measurable way that states specifically what is expected and the standard to which it must be performed: • Accurately convey the level of complexity, responsibility and scope • Write at least one associated input for each KPA • Keep as simple and brief as possible • Begin each sentence with an action verb, in the present tense • Sentences must be outcome-based, containing an action, an object and a purpose • Cluster tasks into a list of fewer, broad (but still specific) responsibilities • Refer to operational manuals, policies or to agreed procedures, rather than include the detail of tasks • Avoid o descriptive adverbs and adjectives (e.g. 'Quickly types basic documents', 'Efficiently processes difficult queries') o pronouns o jargon o abbreviations (e.g. 'mgs', 'docs') o 'tired words' (e.g. 'Manages', 'Contributes to', 'Assists with') o names
Outputs	A list of the main outputs or expected end results to be achieved, linked to the input. Should be specific to the position and the position must be directly accountable for them. Write in a clear, measurable way that states specifically what is expected and the standard to which it must be performed (e.g. quantity, quality, cost and time).
Minimum qualifications	The minimum qualification that would give the incumbent the skills and knowledge or training required to perform the position. Does not include desirable qualifications. Include NQF level where possible. May not be the qualification of the current incumbent.
Minimum experience	The minimum number of years and type of experience that would give the incumbent the experience required to perform the position. Does not include desirable experience. May not be the experience of the current incumbent.
Skills	The minimum skills or technical know-how required to perform the position. Does not include desirable skills. May include languages or software skills. (E.g. Intermediate level Excel).

Knowledge	The minimum knowledge required to perform the position. Does not include desirable knowledge. (E.g. Knowledge of UCT's academic administrative systems).
Professional registrations or licenses	The required professional registrations, industry certifications or licences required to perform the position. Does not include desirable ones.
Other requirements	Any other absolute minimum requirements required to perform the position. Does not include desirable requirements. Great care must be taken to ensure that these requirements are in no way discriminatory, and expert advice and assessment must be sought from your HR Practitioner.
Competencies	The minimum competencies (behavioural traits) required to perform the position. Does not include desirable requirements. A guide to UCT competencies and levels can be found on the HR website. This guide provides a comprehensive list of competencies for all Academic and PASS positions at UCT, and descriptions of how these competencies look at different levels of positions. Some competencies are required by all positions at UCT.
Scope of responsibility	The areas to which responsibility extends, the kind of supervision it receives, the kind of supervision it exercises, the kinds of decisions made by this position, and the kind of decisions that are referred elsewhere.
Contacts and relationships	A listing of the people, departments or organisations that this position deals with regularly, internal and external to UCT.
Agreed by	The position-holder, line manager and HOD agree to the contents of the position description.

Where do I send this form?

Once completed and signed, a copy should be kept by both the line manager and the position-holder (where there is one).
A copy of this form is sent together with the relevant documentation to the relevant persons, in the following processes (amongst others):

- Recruitment
- Position evaluation
- Performance management exceeds awards

What other forms do I need to complete?

None.

What other documentation must be attached?

Attach any other documentation which assists in describing the position.

Where can I get further assistance?

You can contact your HR Practitioner for more assistance in either the design of a position or the development of a position description.

Further information can also be found in the following places:

- Development Dialogue resource guide for PASS staff
- Academic performance planning, performance reviews and staff development
- The UCT Competency framework
- The UCT Jobs catalogue