



**CETAP**

Centre for Educational  
Testing for Access and  
Placement



Emlyn Balarin

Operations Manager

**Finances, Contracts  
and Administration**

# Presentation Outline

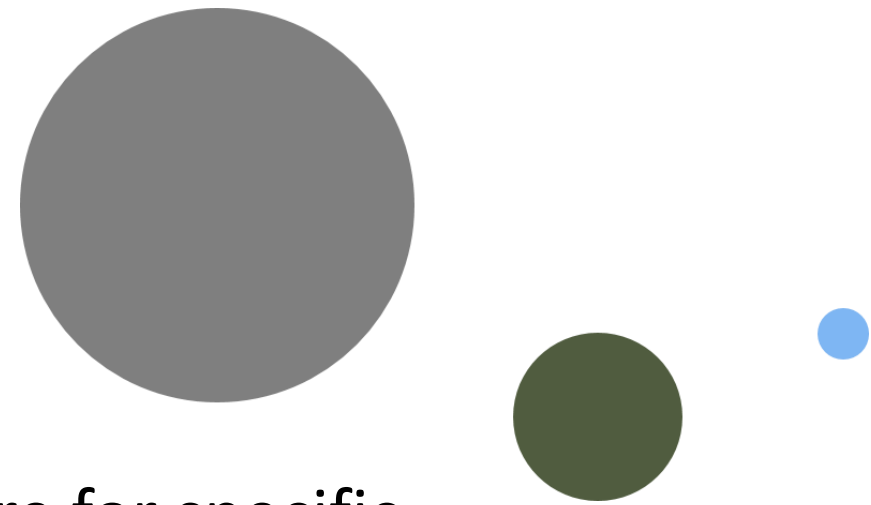
- Contracts – MOUs
- Finances – Budget, Activities
- Administration and Conditions of the UCD Grant

# Contracts



- An MOU was distributed to all invited participants
- The MOU broadly defines the scope of the collaboration
- The MOU serves as a tool to facilitate
  - Protection of IP
  - Transfer of data between participating institutions
  - Formal participation by individuals
  - Outlines financial mechanisms and guidelines
- The MOU provides a start and end date for the collaboration
- While the MOU has already been signed by some Institutions, it may be adapted to specific Institutional requirements.

# Contracts



- Further individual contract may require signature for specific purposes:
  - Non-disclosure agreements for sensitive information
  - Contracts to cover remuneration for specific tasks and deliverables
  - Employment contracts

# Finances

## Summary Budget (CETAP in kind and UCDP Grant Funds)

Activity	2018	2019	2020	Sum of Total
Activity 1: MAT testing for identified First-Year Maths Registrants	R 0	R 800 000	R 800 000	R 1 600 000
Activity 2 Project Coordination	R 194 120	R 194 120	R 194 120	R 582 360
Activity 3: Principles for collaboration determined in consultation with participating institutions	R 218 532	R 0	R 0	R 218 532
Activity 4: Survey of available curriculum-integrated support for mathematics	R 158 800	R 0	R 0	R 158 800
Activity 5: Institutional Workshops (5 partner institutions selected on the basis of immediate need)	R 241 500	R 241 500	R 241 500	R 724 500
Activity 6: Institutional Workshop Preparation	R 293 557	R 293 557	R 293 557	R 880 671
Activity 7: Sharing data relating to one potentially 'at risk' mathematics course	R 317 320	R 317 320	R 317 320	R 951 961
Activity 8: Annual workshop	R 153 740	R 153 740	R 153 740	R 461 220
Activity 9: Annual workshop Preparation	R 95 667	R 95 667	R 95 667	R 287 001
Activity 10: Analysis of NBT MAT data	R 177 735	R 177 735	R 177 735	R 533 206
Activity 11: Workshop with academic staff at all institutions	R 158 000	R 0	R 0	R 158 000
Activity 12: Academic Workshop Preparation	R 66 741	R 0	R 0	R 66 741
Activity 13: Development of Blended Learning Materials	R 376 034	R 376 034	R 376 034	R 1 128 101
Activity 14: Conference Presentations (1 Local and 1 Int / institution)	R 115 735	R 115 735	R 115 735	R 347 205
Activity 15: Publications	R 0	R 29 500	R 29 500	R 59 000
Activity 16: Mid/ End Project Progress Report	R 0	R 139 585	R 139 585	R 279 170
Activity 17: Monitoring of CIS initiatives and their effectiveness	R 218 532	R 218 532	R 218 532	R 655 597
	<b>R 2 786 014</b>	<b>R 3 153 026</b>	<b>R 3 153 026</b>	<b>R 9 092 065</b>

# Finances

- But:
  - Cost of Testing cannot be covered by UCDG
  - Cost of recipient university permanent staffing not covered by UCDG
    - Test Coordinator
    - CETAP Project coordination (Ops manager)
    - CETAP Maths Research Lead
    - CETAP Statistician
    - CETAP Data manager
    - etc
  - Cost of publications not covered

So.....

# Finances

## Summary Budget (UCDP Grant Funds)

Activity	2018	2019	2020	Sum of Total
Activity 2 Project Coordination	R 72 844	R 72 844	R 72 844	R 218 532
Activity 3: Principles for collaboration determined in consultation with participating institutions	R 145 688	R 0	R 0	R 145 688
Activity 4: Survey of available curriculum-integrated support for mathematics	R 72 844	R 0	R 0	R 72 844
Activity 5: Institutional Workshops (5 partner institutions selected on the basis of immediate need)	R 241 500	R 241 500	R 241 500	R 724 500
Activity 6: Institutional Workshop Preparation	R 72 844	R 72 844	R 72 844	R 218 532
Activity 7: Sharing data relating to one potentially 'at risk' mathematics course	R 72 844	R 72 844	R 72 844	R 218 532
Activity 8: Annual workshop	R 153 740	R 153 740	R 153 740	R 461 220
Activity 9: Annual workshop Preparation	R 36 422	R 36 422	R 36 422	R 109 266
Activity 11: Workshop with academic staff at all institutions	R 158 000	R 0	R 0	R 158 000
Activity 12: Academic Workshop Preparation	R 36 422	R 0	R 0	R 36 422
Activity 13: Development of Blended Learning Materials	R 376 034	R 376 034	R 376 034	R 1 128 101
Activity 14: Conference Presentations (1 Local and 1 Int / institution)	R 115 735	R 115 735	R 115 735	R 347 205
Activity 16: Mid/ End Project Progress Report	R 0	R 72 844	R 72 844	R 145 688
Activity 17: Monitoring of CIS initiatives and their effectiveness	R 145 688	R 145 688	R 145 688	R 437 065
	<b>1 700 606</b>	<b>1 360 495</b>	<b>1 360 495</b>	<b>4 421 596</b>

# Finances

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Activity 3: Principles for collaboration determined in consultation with participating institutions	R 145 688	R 0	R 0	R 145 688
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Activity 6: Institutional Workshop Preparation	R 72 844	R 72 844	R 72 844	R 218 532
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The activities were formulated to reach an end goal - but this is a collaborative project so the path to achieve the desired objectives may be guided and steered by the collaborative partners.



# Finances

DMISRS Project Resources covered by UCDG

<b>DMISRS Project Resources</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>Sum of Total</b>
Maths Specialist Leader	R 546 331	R 400 643	R 400 643	R 1 347 616
Maths Specialist: Participant HEI	R 182 110	R 145 688	R 145 688	R 473 487
Blended Learning Specialist	R 303 190	R 303 190	R 303 190	R 909 569
Institutional Workshops	R 241 500	R 241 500	R 241 500	R 724 500
Academic Workshop	R 158 000	R 0	R 0	R 158 000
Annual Workshop	R 153 740	R 153 740	R 153 740	R 461 220
Conferences Attendance	R 115 735	R 115 735	R 115 735	R 347 205
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Workshops at 5 institutions per year

One Academic Workshop in year 1

Annual Workshop x 3

# Finances

DMISRS Project Resources covered by UCDG

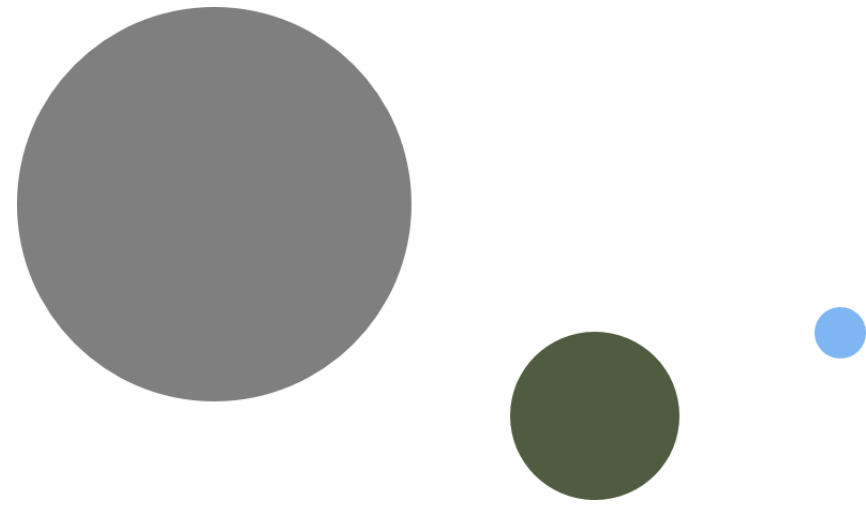
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	<b>R 1 700 606</b>	<b>R 1 360 495</b>	<b>R 1 360 495</b>	<b>R 4 421 596</b>

# Administration and Conditions of the UCD Grant



- CETAP will undertake all administrative processes in accordance with the UCDP standard operating procedures (document available on request)
- Expenditure and processes must follow UCTs formalised procedures and codes of conduct
- All expenditure is audited annually
- Funds can only be spent in accordance with the approved plan
- No roll-overs are permitted by the UCDP

# Administration and Conditions of the UCD Grant



## **The following cannot be funded (not exhaustive):**

- General Infrastructure and Equipment
- Appointment or payment of regular staff
- Student scholarships
- University core business and operational costs
- Monetary incentives for participation in projects
- Entertainment and refreshments must be limited
- Participation in commercial conferences/workshops

***Changes to the plan must be approved by the DG***

# Questions and/or Comments



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