



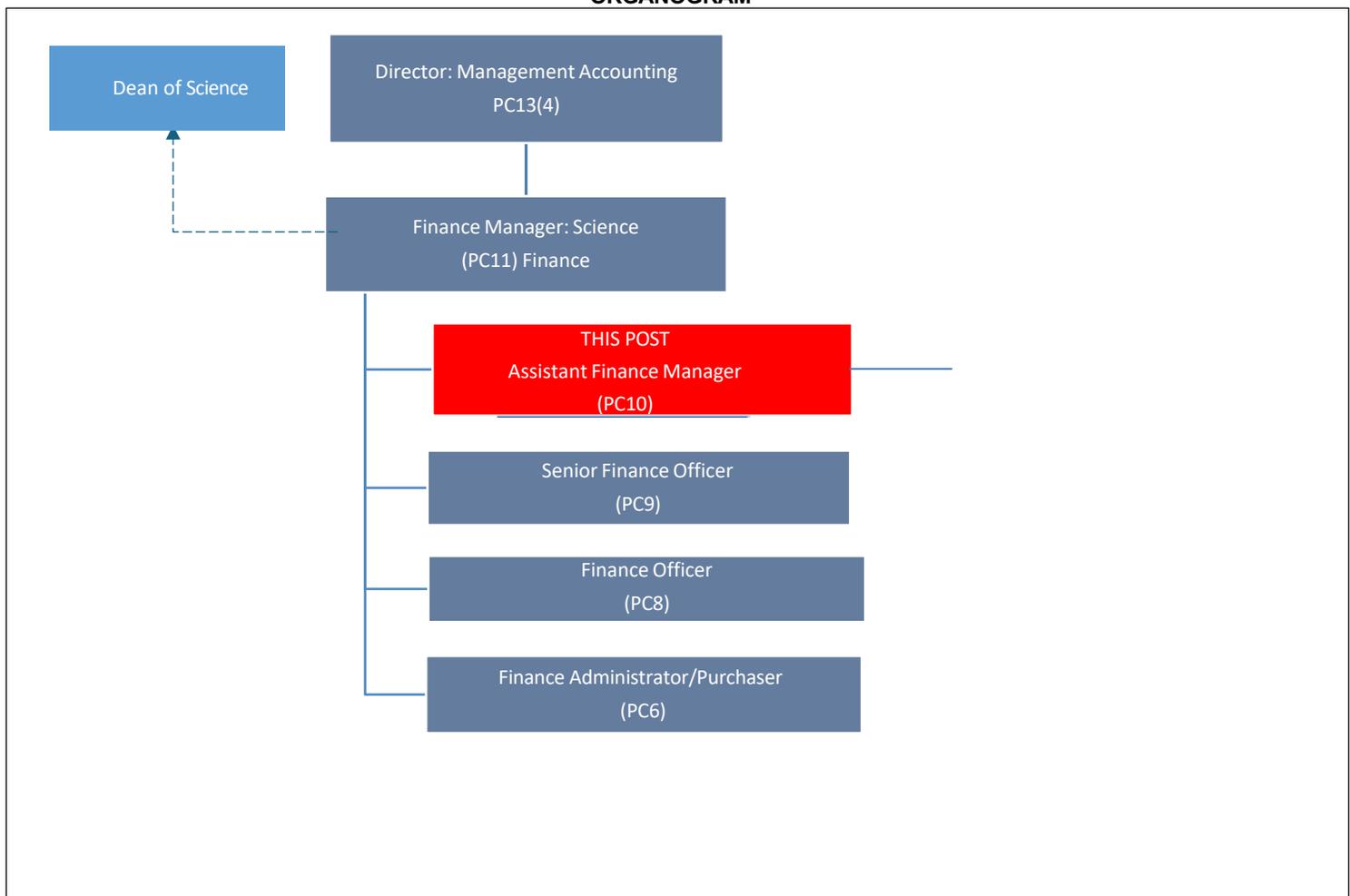
NOTES

- 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	Assistant Finance Manager (AFM) – Faculty of Science		
Job title (HR Practitioner to provide)			
Position grade (if known)	Payclass10	Date last graded (if known)	
Academic faculty / PASS department	PASS		
Academic department / PASS unit	Finance		
Division / section	Management Accounting		
Date of compilation			

ORGANOGRAM



PURPOSE

The main purpose of this position is to assist the Finance Manager with accounting and monitoring functions related to planning, budgeting, financial reporting and financial administration within the unit, and in providing expert financial advice and operational support to the Dean, Heads of Departments, Researchers and Administrators in relation to the financial matters of the unit, as well as undertake ad-hoc projects as the need arises, and deputize for the Finance Manager when required.

CONTENT

Key performance areas		% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
1.	Financial planning and budgeting	20%	<ul style="list-style-type: none"> • Assist budget holders with the preparation of budgets and, where necessary, provide training for them on the process. • Assisting the Finance Manager (FM) in co-ordinating and managing all aspects of the annual planning and budgeting process in the unit and prepare required schedules and reconciliations. • Distribute documentation and other information • Arrange meetings • Take minutes at meetings and action decisions. • Capture budget data and prepare reports, supporting schedules and reconciliations to support the annual planning and budgeting process. • Assist FM with the preparation, consolidation and review of plans and budgets for all supported units. • Assist FM with the preparation and review of annual budgets as well as financial planning reports. • Evaluate staff planning and budget information, for accuracy and annual budgeting purposes. • Provide assistance to staff regarding general budgeting and financial reporting needs. • Perform authorised budget transfers and monitor and report on budget allocations. • Assist staff and their administrators to prepare and review project proposals and budgets for approval and facilitate the implementation of cost recovery mechanisms. 	<ul style="list-style-type: none"> • Financial plans are submitted on time and standards are met • Budget and planning information is consistent, appropriate and complete • Clients are advised on UCT and funder budgeting, costing and indirect cost recovery requirements and parameters. • Positive client feedback

2.	Financial analysis, monitoring, evaluation and reporting	25%	<ul style="list-style-type: none"> • Monitor and report actual expenditure against plan and obtain information to prepare variance analyses and revised forecasts monthly, quarterly and annually. • Prepare, review and distribute internal financial reports and analyses, interpret financial data for the purposes of financial control, monitoring results and follow up on issues (taking appropriate follow up action, inter alia: correcting journals, supporting documentation review). • Accountable for production of FM Dashboard inter alia: <ul style="list-style-type: none"> • Debtors age analysis • Pcard KPIs and unapproved Pcard transactions • Purchasing KPIs and open POs • Clearing of advances • Fund deficit report • Cost recovery • Ensure that outstanding FM Dashboard items are actioned and processed. • Ensure that reconciliations are performed and controls in place. • Assist FM with the preparation of periodic (monthly, quarterly and annual) management accounting reports and project reports. • Obtain input and commentary on performance, progress and reasons for variances, where relevant. • Identify and report on financial irregularities and potential problems to the FM. 	<ul style="list-style-type: none"> • Management accounting reporting deadlines and standards are met • All transactions processed within the Accounts Department comply with UCT's financial policies and regulations • Effective financial control systems are in place • Reconciliations are performed • Financial irregularities and problems are reported timeously
3.	Financial administration, financial control and risk management	20%	<ul style="list-style-type: none"> • Ensure that funds and cost centres are set up and maintained to support the units' operations and specific requirements. • Accountable for funds management – processing fund and cost object maintenance requests, maintenance of fund rules and attributes, funds clean-up process, closing of inactive funds, accuracy of fund information, taking corrective action where necessary with regards inter alia budgets, advances, bridging finance. • Implement corporate governance procedures, risk management and internal controls. • Ensure that proper financial systems and controls are in place to manage payments to staff /suppliers/vendors. • Monitor spending and effectiveness of financial control. • Perform investigations regarding effectiveness and/or efficiencies within the Department and report these to the FM. • Advise staff on financial policy and control. • Ensure that the department complies with all financial policies and procedures and that the system of internal control is applied. • Assist in identifying potential risk areas and make recommendations. • Monitor and facilitate desired outcomes of Purchasing KPIs, uncleared purchasing card transactions, funds deficits, uncleared advances, etc. 	<ul style="list-style-type: none"> • Compliance to financial policy, processes and procedures • Complete forms, with appropriate support documentation and compliance with policies. • Internal control systems are established, including a FM dashboard for management and reporting purposes • Professional advice provided • Effectiveness and efficiency proposals/improvement plans • Proper systems and controls in place to ensure effective and efficient fiscal discipline. • Funds are not in deficit, advances are cleared and outstanding GR's are actioned, purchasing KPIs are monitored. • Accurate and current asset lists per department/unit are maintained • Timeous responses to audit queries

			<ul style="list-style-type: none"> • Prepare and review schedules and supporting documentation for external audit as required. • Facilitate departmental Fixed Asset counts and required reporting. • Assist in the safeguarding of assets by carrying out asset inventory counts as required. • Assist with follow up on audit queries and feedback thereon. • Assist with follow up on audit findings to ensure they do not recur. 	
4.	People Management and Leadership, Staff Development and Transformation (functional, influential, and facilitative)	15%	<ul style="list-style-type: none"> • Serve as line management for own staff. • Take responsibility for Development Dialogues/performance agreement for own staff. Co-ordinate reviews and appraisals of sub-ordinate staff for submission to FM. • Manage staff leave. • Ensure staff records are kept up to date. • Ensure that current staff are trained on new policies and procedures. • Co-ordinate and manage assigned projects, activities and tasks as required. • Perform any additional tasks and duties as assigned/delegated by the FM as and when required. • Assist with ad-hoc projects. • Assume the second in charge (2IC) role within the Finance Office, and deputise for the FM in his/her absence. 	<ul style="list-style-type: none"> • All human resource functions relating to own staff are carried out timeously and in accordance with UCT HR policy, and relevant legislation • Relevant documentation is correctly completed, signed off and processed • Regular staff review and feedback given • Staff members are well trained and equipped to meet the performance standard expected • Positive working relationships • Motivated staff members • Staff are managed and developed • Tasks and outputs are appropriately planned, delegated, reviewed and delivered • Satisfactory continuation of operations in absence of FM
5.	Stakeholders relations: Create & maintain partnerships with and provide professional advisory services	5%	<ul style="list-style-type: none"> • Provide advice and assistance to departmental staff regarding UCT policies, guidelines and procedures. • Apply an in-depth understanding of the structure and operations of UCT's accounting system to departmental staff with complex queries, reconciliations and data manipulation. • Provide training and coaching to departmental administrators and in relation to financial responsibilities to encourage greater understanding of financial matters and processes in the University. • In consultation with the FM, identify areas where training is needed, and develop training and reference materials as required. • Advise on alternative courses of action – inter alia: investment options, expenditure and revenue transaction options and requirements. • Provide a professional face-to-face (walk-in), telephone and email communication service. • Create & maintain partnerships with key-stakeholders and provide professional advisory services. 	<ul style="list-style-type: none"> • Compliance with departmental and university policies, protocols and procedures • Positive feedback from line management and staff • Enhanced administrative functioning of the department. • Key staff and stakeholders are fully informed on relevant financial matters.

6.	Transactional monitoring	5%	<ul style="list-style-type: none"> • Check and authorise documents such as mileage claim forms, subsistence & travel, journals, petty cash, HR forms 	<ul style="list-style-type: none"> • Complete forms, with appropriate supporting documentation and compliance with policies.
7.	Specific support for Research operations	10%	<ul style="list-style-type: none"> • Assist researchers and their administrators to prepare and review project proposals and budgets for approval and facilitate the implementation of University and Faculty cost recovery systems. • Assist researchers with obtaining budgets from central research office for current spending year. • Advise researchers and their administrators of research submission deadlines to ensure compliance with funder requirements. • Monitor and track research fund transfers and allocations on research data dashboard on a monthly basis to ensure that research transfers have been processed timeously. 	<ul style="list-style-type: none"> • Clients are advised on UCT and funder budgeting, costing and cost recovery requirements and parameters. • Internal control systems are established using research dashboard for management and reporting purposes.

MINIMUM REQUIREMENTS

Minimum qualifications	<p>An accounting degree (BCom or equivalent) at NQF7 level and 3 years' relevant work experience</p> <p>OR</p> <p>a 3-year tertiary qualification in accounting/management accounting at NQF6 level and 4 years' relevant work experience</p>			
Minimum experience (type and years)	As per above			
Skills	<ul style="list-style-type: none"> • Well-developed functional leadership and management skills, with an exposure to various aspects of finance and accounting. • A broad knowledge and understanding of financial and management accounting principles, with proven analytical and interpretive abilities and report writing skills. • Proven computer literacy in the use of MS Office at an intermediate level. • ERP systems experience in a medium-to-large organisation. • Ability to interact successfully with clients at all levels regarding financial matters, and to provide related advice, coaching and training. • Ability to take initiative, exercise judgement, solve problems, and work accurately and to deadline with minimal supervision. • Attention to detail and the ability to manage large quantities of information. • Excellent organisation skills and the ability to establish priorities. • Excellent verbal and written communication skills coupled with sound interpersonal skills. 			
Knowledge	<ul style="list-style-type: none"> • Exposure to SAP (CO and FI modules) would be advantageous. • Staff management/supervision would be advantageous. • Experience in the Higher Education sector would be advantageous. 			
Professional registration or license requirements	-			
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Honesty to handle cash or finances'.)	<ul style="list-style-type: none"> • Commitment towards maintaining confidentiality as required by this position. • Be professional and deliver high quality work. • Be a team player. • Honesty and integrity in handling cash and or finances. 			
Competencies (Refer to UCT Competency Framework)	Competence	Level	Competence	Level
	Analytical thinking / Problem solving	2	Individual Leadership	2
	Communication	2	Professional knowledge and skill	2
	Client service and support	2	University awareness	2
	Information management	2	Planning and organizing / work management	2
	Stress tolerance	2	Decision-making/ Judgement	2
	Attention to detail	2	Interpersonal Relationships	2
Results focus	2	Resource and People management	2	

SCOPE OF RESPONSIBILITY

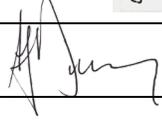
Functions responsible for	Refer KPA section
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Amount and kind of supervision received	The incumbent is expected to operate at a level that requires minimal supervision however deliverables and outputs generally will be reviewed and approved by the Finance Manager.
Amount and kind of supervision exercised	Supervision pertaining to the allocation and monitoring and evaluation of the output of the staff reporting into this post.
Decisions which can be made	Limited to own job after having consulted with and having sought approval from the Finance Manager.
Decisions which must be referred	Any escalated queries which cannot be resolved, and which requires management's approval.

CONTACTS AND RELATIONSHIPS

Internal to UCT	Various sections within the Finance Department, Key stakeholders within Science (Management, Academic and Admin staff), HR, Internal Auditors, other Internal stakeholders.
External to UCT	Vendors, External Funders, External Auditors.

AGREED BY

	PRINT NAME	SIGNATURE	CONTACT NO.	DATE
Position Holder	Vacant			
Line Manager	Farhana Moodley		021 650 2545	09/05/2025
HOD	Tony Dollery		021 650 4323	
CFO	Vincent Motholo		x2217	
HR Practitioner	Gay Tyler		x3927	