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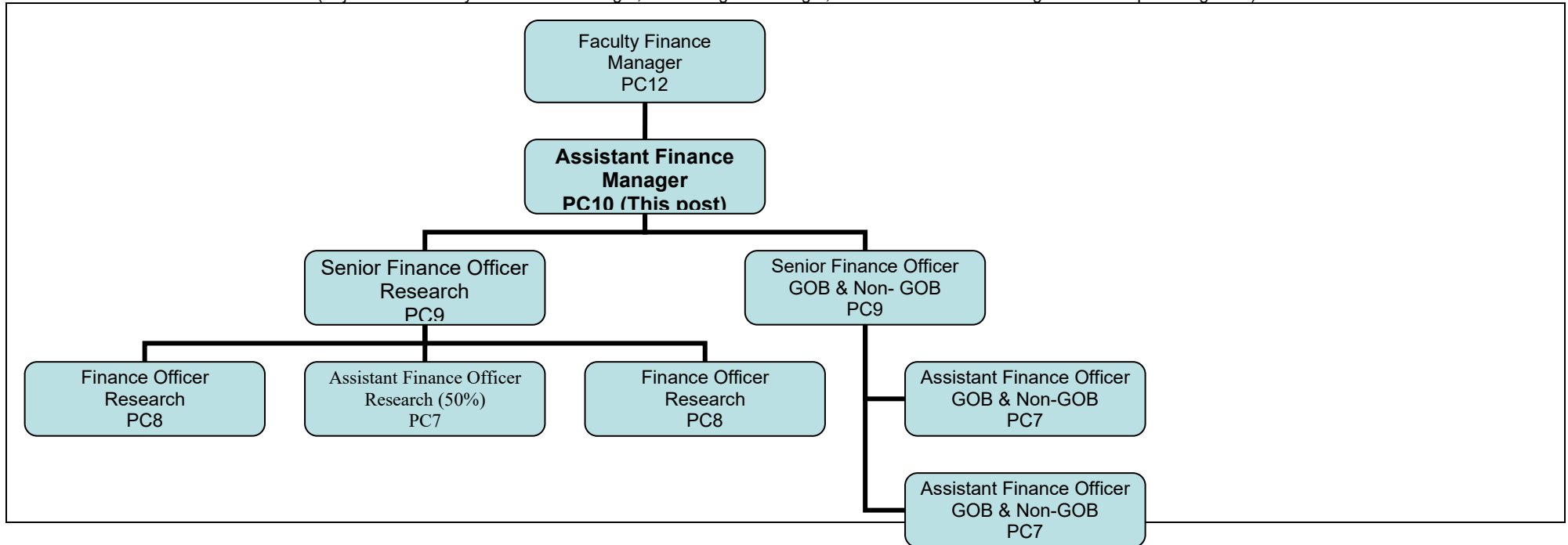
- Forms must be downloaded from the UCT website: <http://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

POSITION DETAILS

Position title	Assistant Finance Manager		
Job title (HR Practitioner to provide)			
Position grade (if known)	10	Date last graded (if known)	
Academic faculty / PASS department	Humanities		
Academic department / PASS unit			
Division / section	Finance		
Date of compilation	24.04.2023		

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 assist the Finance Manager in the Faculty of Humanities to implement and maintain an effective financial management control system for the General Operating Budget (GOB), Non-GOB, Investment and Research Finance within the Faculty (through planning, budgeting, controlling, monitoring, analysing, interpreting and reporting on financial data) and ensure that all financial transactions are processed in accordance with UCT policies, procedures and statutory requirements. To undertake ad-hoc projects as the need arises.

To deputise for the Finance Manager in his/her absence.

CONTENT

Key performance areas		% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
1	Management and Leadership	15	<ul style="list-style-type: none"> Assume the 2IC role within the Faculty Finance Office and deputise for the Faculty Finance Manager in his/her absence. Work closely with the Faculty Finance Manager to provide leadership in the Faculty Finance team, and among the departmental administrators in the Faculty. Line management of the 2 Senior Finance Officers (PC09) and oversee their management of the 2 Finance Officers and 3 Assistant Finance Officers. Co-ordinate and manage assigned projects, activities and tasks as required. Carry out any other duties which may be delegated or requested by the Faculty Finance Manager. <u>Ensure staff are trained and aware of new finance policies and procedures.</u> 	<ul style="list-style-type: none"> Satisfactory continuation of operations in absence of Finance Manager Staff trained and equipped to perform functions. Projects, activities, and tasks are completed. Positive working relationships

2	Planning, Budgeting and Reporting	30	<ul style="list-style-type: none"> • In consultation with the Faculty Finance Manager, co-ordinate and manage all aspects of the annual planning and budgeting exercise in the Faculty, and prepare required schedules and reconciliations. • Perform authorised budget transfers, and monitor and report on budget allocations. • Monitor and report actual expenditure against plan, and obtain information to prepare variance analyses and revised forecasts monthly, quarterly and annually. • 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. • Ensure that the cost recovery registers are maintained 	<ul style="list-style-type: none"> • Annual budgeting deadlines and standards are met. • Monthly and quarterly reporting deadlines and standards are met. • Budgetary control mechanisms are implemented and variances followed up • Clients are advised on UCT and funder budgeting, costing and indirect cost recovery requirements and parameters.
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3	Monitoring and Control	25	<ul style="list-style-type: none"> • Prepare and review project financial reports for external funders. • Prepare and review schedules and supporting documentation for external audit as required. • Ensure that the financial statements and audits register is maintained. • Ensure funds assigned to Faculty Finance team members are reviewed on a regular basis, fund deficit balances are managed and cleared, reconciliations and controls are performed, outstanding purchase orders, advances and purchasing card transactions are followed up and irregularities and potential problems are reported timeously to the Finance Manager. • Prepare, review and distribute a range of internal financial reports and analyses, interpreting the financial data for the purposes of financial control, monitoring the results and following up on problems. • Run or collate routine debtors control reports and ensure income due from external funders is received. Follow up on queries and ensure problems are identified and solved. • Prepare other control reports and follow up as required. • Undertake financial year end procedures by extracting reports from SAP, analyse and following up on queries. 	<ul style="list-style-type: none"> • Financial reporting to funders is completed within deadline and to required standard. • Funder audits are successfully completed. • Funds are managed within UCT policies and procedures, and problems are identified and reported, and remedial action is agreed timeously with management. • Anomalies and queries investigated and resolved. • Accurate and consistent reporting.
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4	Financial Administration	10	<ul style="list-style-type: none"> • Review documentation prepared for processing, and ensure that all transactions comply with UCT's financial policies, guidelines and procedures. • Process fund and cost object maintenance requests, and answer queries, taking follow up action as required. • Assist in the safeguarding of Faculty assets by liaising with the relevant faculty and central UCT staff and carry out asset counts and verifications as required. • Prepare specific journals and supporting documents as required. 	<ul style="list-style-type: none"> • Compliance with UCT Finance policies and procedure. • Control mechanisms in place to manage finance processes. • Anomalies and queries investigated and resolved. • Accurate and consistent reporting.
5	Financial Advice and Support	10	<ul style="list-style-type: none"> • Provide advice and assistance to Faculty departmental and Finance Office staff regarding UCT policies, guidelines and procedures. • Apply an in-depth understanding of the structure and operations of UCT's accounting system to assist Faculty Finance Office and departmental staff with complex queries, reconciliations and data manipulation. • Provide training and coaching to departmental administrators, fund holders and colleagues in the Faculty Finance Office in relation to financial responsibilities to encourage greater understanding of financial matters and processes in the University. • In consultation with the Faculty Finance Manager, identify areas where training is needed, and develop training and reference materials as required. 	<ul style="list-style-type: none"> • UCT policies and procedures are complied with and risk is controlled • Staff trained and equipped to perform functions

6	Research Operations support	10	<ul style="list-style-type: none"> • Oversee assistance to 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. • Oversee assistance to researchers with obtaining budgets from central research office for current spending year. • Ensure researchers and their administrators are advised of research submission deadlines to ensure compliance with funder requirements. • Ensure monitoring and tracking of research fund transfers and allocations reflect accurately on the monthly dashboard and 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.
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MINIMUM REQUIREMENTS

Minimum qualifications	<p>A 3 year tertiary qualification in accounting/management accounting/costing (e.g. National Diploma with Accounting major) at NQF6 level PLUS at least five years' post qualification relevant experience.</p> <p>OR if qualified by experience, a minimum matric with at least seven years working experience at this level with similar/same responsibilities sought for this post.</p>			
Minimum experience (type and years)	A minimum of five years post qualification relevant experience.			
Skills	<ul style="list-style-type: none"> • Proven computer literacy with a particular focus on MS Excel at an intermediate to advanced level. • ERP experience is essential. • 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 oral and written communication skills coupled with sound interpersonal skills. 			
Knowledge	<ul style="list-style-type: none"> • A broad knowledge of and understanding of financial, and management accounting principles, with proven analytical and interpretive abilities and report writing skills. <p>The following would be highly advantageous:</p> <ul style="list-style-type: none"> • Knowledge of and experience with the SAP accounting system. • Experience in financial administration processes within UCT and/or another higher education institution. • Staff management experience. 			
Professional registration or license requirements	n/a			
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. • Possess a high level of honesty and integrity in handling cash and or finances. • Attention to detail. • Proven high level analytical and interpretive abilities. • Uncompromising attitude to meeting deadlines. 			
Competencies (Refer to UCT Competency Framework)	Competence	Level	Competence	Level
	Analytical thinking & problem solving	2	Adaptability/flexibility	2
	Teamwork/collaboration & people management.	2	Communication	2
	Client service and support & results focused	2	Planning & organizing/work management	2
	University awareness	2	Quality commitment/work standards	2

SCOPE OF RESPONSIBILITY

Functions responsible for	<p>The scope of AFM functions responsible for are within the following broad areas:</p> <ul style="list-style-type: none"> • Financial Planning, Budgeting, and Reporting • Financial Monitoring and Control (including Short Courses) • Financial Administration • Financial Advice and Support • People Management & Staff development: Recruitment, education, and training: faculty-wide and for own department
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 exercised for the faculty with respect to <ul style="list-style-type: none"> • Financial planning and budgeting • Financial analysis, evaluation, and periodic reporting • Financial control and risk management • Financial advice to a large client base • Recruitment, education, and training: faculty-wide • Human resource management: own department
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	Limited to own job after having consulted with and having sought approval from the Finance Manager.

CONTACTS AND RELATIONSHIPS

Internal to UCT	Faculty of Humanities, Central Finance, FND units, ICTS, HR, DR&I, P&S, internal auditors and clients or partners.
External to UCT	Funders; Donors; Auditors; Other universities/Research institutions; SA govt agencies; other research related stakeholders.