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

NOTES

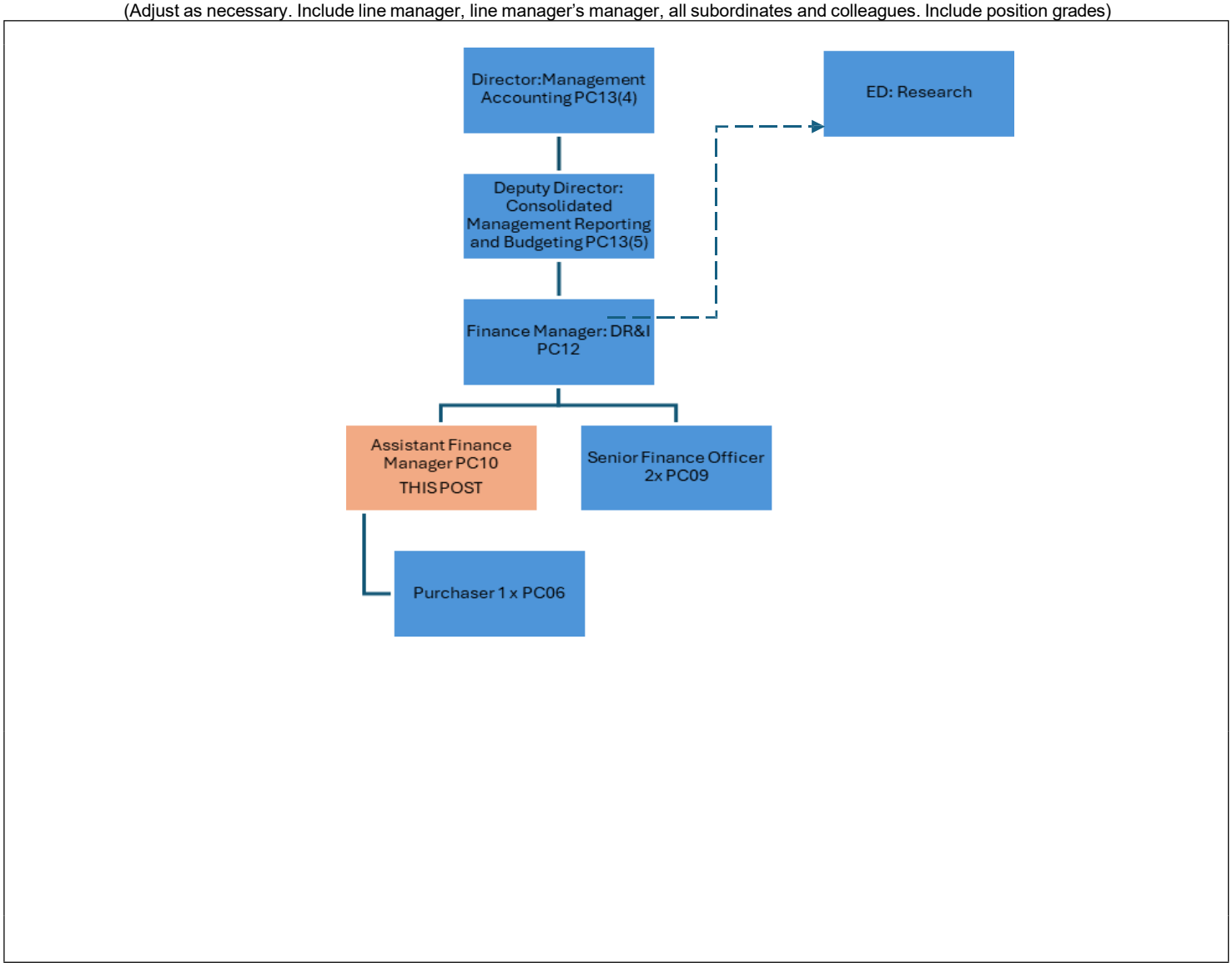
- Forms must be downloaded from the UCT website: https://forms.uct.ac.za/forms.htm
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

POSITION DETAILS

Position title	Assistant Finance Manager (AFM): Department of Research and Innovation (DR&I)		
Job title (HR Business Partner to provide)			
Position grade (if known)	PC10	Date last graded (if known)	
Academic faculty / PASS department	PASS		
Academic department / PASS unit	Finance		
Division / section	Management Accounting		
Date of compilation	08/09/2026		

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 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 Executive Director, Director, Heads of Departments, 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. This role also manages the departmental Purchaser.

CONTENT

Key performance areas		% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
E.g.	General and office administration	25%	Takes, types up and distributes minutes and agendas for monthly departmental meeting. Greets visitors, enquires as to the nature of their visit and directs them to the appropriate staff member.	All staff members receive an electronic copy of accurate minutes and agendas, in the departmental template/format, a week before the meeting. Visitors are directed to appropriate staff member in a professional and efficient manner.
1	Financialplanning and budgeting	20%	• Assist FM with the preparation, consolidation and review of plans and budgets for all supported units. (Operational, Capex and Projects) • Assist FM with the preparation and review of annual budgets as well as financial reports. • Evaluate staff planning and budget information produced by the HR Department for annual budgeting purposes, for accuracy. • Assist budget holders with the preparation of budgets and, where necessary, provide training for them on the process. • Provide assistance to staff regarding general budgeting and financial reporting needs. • Capture budget data and prepare reports, supporting schedules and reconciliations to support the annual planning and budgeting process.	• Financial plans are submitted on time and standards are met. • Budget and planning information is consistent, appropriate and complete. • Positive client feedback
2	Financial analysis, evaluation and reporting.	25%	• 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. • Ensure that reconciliations and controls are performed. • Ensure that outstanding purchase orders are followed up. • Identify and report on financial irregularities and potential problems to the FM. • Preparation of ad hoc financial statements/reports on externally funded activities and perform ad hoc investigations as required by the client.	• 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	25%	• Ensure that funds and cost centres are set up and maintained to support the units' operations and specific requirements. • Create, implement and monitor processes and procedures around the creation of monthly forecasts. • Implement corporate governance procedures, risk management and internal controls. • Advise staff on all aspects of financial policy and control. • 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. • Ensure that the department complies with all financial policies and procedures and that the system of internal control is applied. • Ensure integrity and accuracy of financial systems and processes. • Identify potential risk areas and make recommendations. • Monitor and facilitate desired outcomes of Purchasing KPIs. • Facilitate desired outcomes and advise appropriately on funds deficit and uncleared advances. • Facilitate departmental Fixed Asset counts and required reporting. • Assist in the safeguarding of assets by ensuring that asset inventory counts are performed as required. • Follow up on all audit queries and provide feedback thereon. • Follow up on audit findings to ensure they do not recur. • Regularly check PGFO Freestanding and Grantholder linked funds to ensure that NRF claims and CRF revenues claims are processed timeously. • Assist the PGFO SFO with fund reconciliations. • Perform any additional tasks and duties as assigned by the FM as and when required.	• Compliance to financial policy, processes and procedures • Internal control systems are established, including a KPI dashboard for management and reporting purposes. • Corporate governance procedures in place. • 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. • Accurate and current asset lists per department/unit are maintained. • Timeous responses to audit queries. • Tasks, activities and assigned projects are adequately planned, implemented, reviewed and timeously delivered.

4	People Management and Leadership, Staff Development and Transformation (functional, influential, and facilitative)	15%	• Direct line management of Purchaser role • Take responsibility for Development Dialogues/performance agreement. Co-ordinate reviews and appraisals for submission to FM. • Manage staff leave. • Assume the second in charge (2IC) role within the Department Finance Office and deputize for the Finance Manager in his/her absence. • Supervisory oversight of PGFO and RCI Senior Finance Officers' responsibilities. • Co-ordinate and manage assigned projects, activities and tasks as required. • Represent DR&I Finance Office on various committees within DR&I. • Ensure that staff are trained and aware of new finance policies and procedures.	• Staff members are well trained and equipped to meet the performance standard expected • All human resource functions relating to own staff are carried out timeously and in accordance with UCT HR policy, and relevant legislation • Staff perform optimally within a team as well as individually as needed. • Satisfactory continuation of operations in the absence of the Finance Manager. • Positive client feedback.
5	Stakeholders relations: Create & maintain partnerships with and provide professional advisory services	5%	• Coach and provide feedback to fund holders and departmental administrators to assist them to understand and apply UCT's policies and procedures. • Advise on alternative courses of action – inter alia: investment options, expenditure and revenue transaction options and requirements. • 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. • Create & maintain partnerships with key-stakeholders and provide professional advisory services.	• Professional financial advice provided. • 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	10%	• Check and authorise documents such as mileage claim forms, subsistence & travel, journals, HR forms	• Forms are complete, with appropriate supporting documentation and compliance with policies.

MINIMUM REQUIREMENTS

Minimum qualifications	• NQF6 qualification in Accounting
Minimum experience (type and years)	• At least 4 years' relevant experience with exposure to various aspects of finance and management accounting (one year's experience may be forgone for a higher qualification i.e. NQF7 and higher).
Skills	• A broad knowledge and understanding of financial and management accounting principles, with proven high level analytical and interpretive abilities. • Proven computer literacy in the use of MS Office at an intermediate level. • ERP systems experience in a medium-to-large organisation. • Ability to multi-task, prioritize work appropriately, work under pressure and to work independently and accurately with minimal supervision. • Attention to detail and an uncompromising attitude to meeting deadlines without sacrificing quality. • Ability to work methodically, efficiently and meticulously. • Excellent verbal and written communication skills coupled with sound interpersonal skills. • An ability to interact successfully with individuals across various levels, within internal and external to the organisation. • A commitment to the provision of excellent client service in a cross-cultural environment.
Knowledge	• SAP (CO and /or FI modules) and IDU exposure would be advantageous. • Government Agency Funding rules regarding financial matters would be advantageous. • Relevant experience in the Higher Education sector would be advantageous. • Staff management/supervisory experience would be advantageous.
Professional registration or license requirements	
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Ability to handle cash or finances'.)	• 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 managing finances.

Competencies (Refer to UCT Competency Framework)

Competence	Level	Competence	Level
Analytical thinking / Problem solving	2	Individual Leadership	2
Building partnerships	2	Professional knowledge and skill	2
Communication	2	Resource & People management	2
Client service and support	2	Stress tolerance	2
Information management	2	University awareness	2
Stress tolerance	2	Planning and organizing / work management	2
Attention to detail	2	Decision-making/ Judgement	2
Results focus	2	Interpersonal Relationships	2

SCOPE OF RESPONSIBILITY

Functions responsible for	Refer KPA section
Amount and kind of supervision received	Limited as the incumbent is expected to operate at an independent level.
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	Clients (grant holders) and strategic partners such as other Finance units, HR and Central Research Finance.
External to UCT	Funders (e.g. NRF, MRC), Other universities, Auditors.

Work Location (✓ tick appropriate box and provide detail in space below) (Refer to UCT Flexible Work Approach Guideline		Onsite	√	Hybrid		Remote
	Specified hybrid: The staff member is expected to be in office (on-site) three days a week and two days remote.					
Work Schedule (✓ tick appropriate box and provide detail in space below) (Refer to UCT Flexible Work Approach Guideline		Structured	√	Semi-Structured		Unstructured
	The staff member is expected to be contactable during core operating hours. The staff member will perform their contracted duties during specified core hours and/or on certain specified days, if and when determined by the staff member's line manager. However, time outside the specified core hours and/or days is flexible and may be worked according to a schedule of the staff member's choice, based on operational requirements and the tasks to be performed.					