


HR191	<b>POSITION DESCRIPTION</b>	 <b>UNIVERSITY OF CAPE TOWN</b> IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD
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**NOTES**

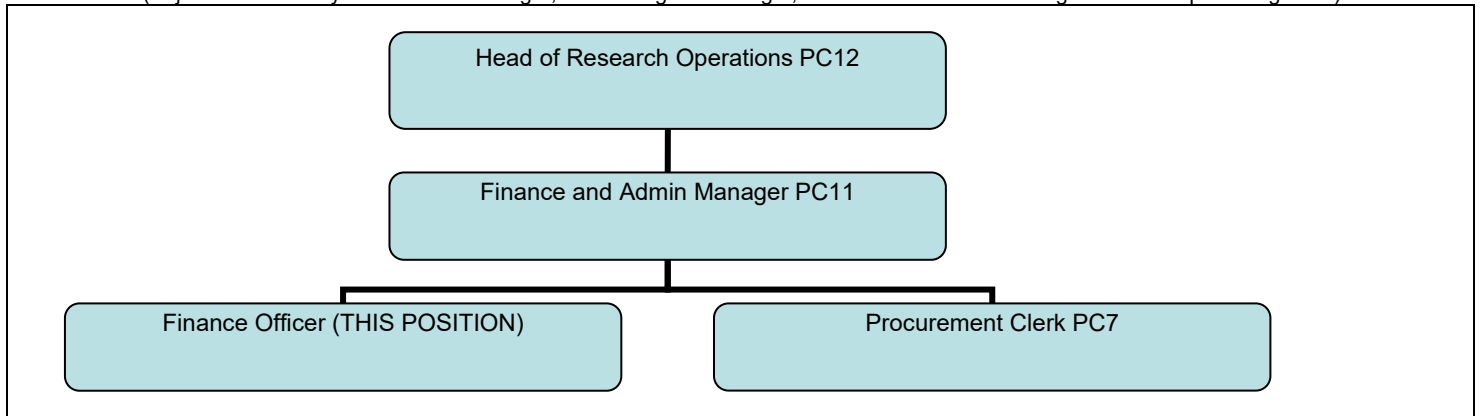
- Forms must be downloaded from the UCT website: <http://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

**POSITION DETAILS**

Position title	Finance Officer		
Job title (HR Practitioner to provide)			
Position grade (if known)	8	Date last graded (if known)	
Academic faculty / PASS department	Science		
Academic department / PASS unit	H3D		
Division / section	H3D		
Date of compilation	09 March 2021		

**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 proactively provide comprehensive efficient and professional administrative and finance assistance to the Director, staff and students of H3D Drug Discovery Centre and academic group at UCT to ensure the efficient running of the units and management of finances within the Faculty of Science and Faculty of Health Science.

Accountabilities and responsibilities include:

Operational Know-how:

- Perform duties with appropriate knowledge of financial and administrative systems, tools and procedures
- Demonstrate a working knowledge of relevant UCT policies and guidelines and where appropriate; complete compliance training as required

Decision Making:

- Seek understanding of how own responsibilities fit into overall units' objectives and organize day-to-day work accordingly

Desired Behaviors: Apply H3D Values & Behaviors with a specific focus on:

- Proactively share technical expertise with other members of the team
- Interact with others in a positive, collaborative manner and help resolve conflicts in a constructive manner
- Support H3D mission and leadership decisions and, with help of supervisor, prioritize own tasks in support of these decisions and towards accomplishing project goals
- Ensure the integrity and accuracy of data to produce reliable & accurate reports

This job description is not an exhaustive list of all the tasks and, in a changing environment, the specific tasks assigned may differ in detail, but the level of responsibility and overall nature of the work will remain the same.

**CONTENT**

Key performance areas		% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
1	Financial Reporting, Analysis & Fund Management	35%	<ul style="list-style-type: none"> <li>• Prepare monthly/quarterly/annual financial reports as per external funder requirements.</li> <li>• Administer the opening, closing and housekeeping of funds as requested by Finance Manager.</li> <li>• Ensure journals, and invoice and receipt requisitions are properly prepared and checked for submission to Faculty Finance for authorization.</li> <li>• Manage the release of invoices with deliverables attached by reminding the PI of due dates (research reports and financial statements). Report status to Faculty Manager.</li> <li>• Submit monthly report on deficit funds to Finance Manager. Facilitate the elimination of such deficits.</li> <li>• Prepare financial information and audit packs for projects requiring audits as per external funder requirements</li> <li>• Maintain a research funds database to track spending rules, budget allocations, deliverables due and due dates</li> <li>• Maintain financial authorization procedures and limits in compliance with UCT and Faculty Finance policies.</li> <li>• Assist with the preparation of monthly, management reports for the centres.</li> <li>• Maintain records of expenditure approved</li> </ul>	<ul style="list-style-type: none"> <li>• Prompt and timely reporting of financial status or performance of the department</li> <li>• Budget is spent against planned activities.</li> <li>• Expenditure is charged against a budget to avoid overspending within line items</li> <li>• Funds are not in deficit</li> <li>• Management and tracking of funder requirements to ensure compliance and timely reporting</li> <li>• Good record keeping for audit purposes</li> </ul>
2	Budgeting (Cost recovery and approvals)	10%	<ul style="list-style-type: none"> <li>• Ensure cost recovery is in line with faculty and the department's cost recovery mandate and funder policies and procedures.</li> <li>• Apply the Faculty cost recovery model to all budgets.</li> <li>• Ensure that cost recovery items as per the approved budgets are charged accordingly to projects and approved via ERA.</li> <li>• Process budgets through ERA as requested by Finance Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure NIPMO &amp; Cost recovery policies are adhered to</li> <li>• External Funder rules are obeyed</li> <li>• Sufficient cost recoveries as per Faculty guidelines</li> <li>• Budgets are reviewed and approved in a timely manner</li> </ul>

3	General and Office Administration and Finance	30%	<ul style="list-style-type: none"> <li>• Correspond with new Post docs / students/ staffs and assist them with arrival &amp; settling in at UCT – directions, registration, access cards, and parking.</li> <li>• Draft and compose letters for staff /students (iro bursaries / funding support, offers, advances, vacation accommodation, references, bank letters, Visa applications etc) for the director to sign</li> <li>• Manage travel arrangements (flights, visas, conference registration, S&amp;T, accommodation /ground travel) for staff, post docs and students travelling for conferences and project meetings.</li> <li>• Maintain records of staff information (demographics, staff numbers, etc) and research outputs, including impact factors, for reporting to funders when necessary.</li> <li>• Order office equipment and maintain stationery supplies</li> <li>• Oversee and manage petty cash reimbursement process, ensuring all claims are valid in terms of UCT and funder rules and policies.</li> <li>• Manage the Director's and own purchasing cards</li> <li>• Maintain a logical, methodical filing system that is accessible</li> <li>• Manage laptop distribution and maintain laptop register</li> </ul>	<ul style="list-style-type: none"> <li>• Correspondence handled within the required timeframe</li> <li>• Positive feedback</li> <li>• Accurate records of all correspondence</li> <li>• All documents typed up accurately and within the required timeframe</li> <li>• All required documentation and files available prior to the deadline for post graduate selection</li> <li>• Accurate, prompt travel arrangements made</li> <li>• Office consumables available as required</li> <li>• All staff have laptops and access to the network, building etc when starting to work</li> <li>• All travel arrangements are made timeously</li> <li>• Fully accounted for petty cash floats</li> <li>• Financial Management support</li> <li>• Ensure all P Card documents are signed and submitted for processing</li> <li>• All relevant documents and presentations available to Director and staff.</li> </ul>
4	Post Doc and Student Bursary Management	10%	<ul style="list-style-type: none"> <li>• Draw up and keep updated annual schedule of bursary payments to postdocs and students showing amounts, source of funds and payments /balances due</li> <li>• Arrange and follow up bursary payments for all students, student advances and reimbursements</li> <li>• Preparation of bursary journals and documentation for payment to student fee accounts</li> <li>• Complete bursary forms, compile related journals and tracked through processes on SAP and PSoft, using 'Student Financials' to ascertain student's funding status. Engaged with Fac office and PGFO re problems</li> </ul>	<ul style="list-style-type: none"> <li>• Prompt, accurate and timely payment of student stipends.</li> </ul>

5	Human Resources	15%	<ul style="list-style-type: none"> <li>For all recruitment managed internally by the department: assist with recruitment process (setting up selection committee meetings and interviews, receiving and uploading CV's on Vula, requesting reference letters etc.)</li> <li>Assisting with monitoring the progress of relevant recruitment and selections paperwork</li> <li>Assist all new and current staff/students with admin requests with regards to the HR processes</li> <li>Assist with completing the necessary HR recruitment, renewal, resignation forms etc.</li> <li>Assist with tracking the status of the relevant HR processes.</li> <li>Maintain staff contract start and end dates</li> </ul>	<ul style="list-style-type: none"> <li>All documents are uploaded on time and the process is facilitated promptly and accurately.</li> </ul>
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**MINIMUM REQUIREMENTS**

Minimum qualifications	A tertiary level accounting qualification (BCom degree or other equivalent Accounting/Management Accounting /Costing qualification); If qualified by experience, Matric with at least 5 years' experience at the advertised level, with the same/ similar key performance areas				
Minimum experience (type and years)	At least 3-5 years' financial/management accounting experience in a large or medium size organizational environment				
Skills	Working in a team, Critical/ analytical Thinking, Attention in detail, SAP or similar and ERA knowledge				
Knowledge					
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'.)	Honesty, Integrity, Ability to work in a fast changing environment, Ability to work in a team				
Competencies (Refer to <a href="#">UCT Competency Framework</a> )	Competence		Level	Competence	Level
	Analytical Thinking/Problem Solving		2	Initiating Action/Initiative	2
	Initiating Action/Initiative		2	Stress Tolerance	3

	Decision Making/Judgement	2	Stress Communication	2
	Professional Knowledge and Skill	2	Client/Student Service and Support	3


#### SCOPE OF RESPONSIBILITY

Functions responsible for	General Finance and Admin (See KPI's)
Amount and kind of supervision received	Moderate – Line Manager
Amount and kind of supervision exercised	N/A
Decisions which can be made	Moderate
Decisions which must be referred	Moderate

#### CONTACTS AND RELATIONSHIPS

Internal to UCT	Faculty of Science, Faculty of Health Science, Debtors, Contracts Office, Students
External to UCT	Funders, External Auditors

#### AGREED BY

	PRINT NAME	SIGNATURE	CONTACT NO.	DATE
Position Holder	Prof K Chibale		X2553	25/04/2021

Line Manager	Ayesha Banderker	<i>Banderker</i>	X1438	21/02/2021
HOD	Prof K Chibale			
Dean / ED	Prof Maano Ramutsindela			
HR Practitioner	Barbara Jones			



# 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
- performance objectives are set during Development Dialogues.

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:

<b>Position title</b>	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 <a href="#">HR Practitioner</a> , from the UCT Jobs Catalogue.
<b>Job title</b> (HR Practitioner to provide)	The SAP position title of this post. Obtainable from your <a href="#">HR Practitioner</a> , from the UCT Jobs Catalogue.
<b>Position grade</b>	The current position grade of this position, if it exists (if known).
<b>Date last graded</b>	The date on which the position was last graded, if it has been graded (if known).
<b>Academic faculty /</b>	The academic faculty / PASS department in which the position sits.



<b>PASS department</b>	
<b>Academic department / PASS unit</b>	The academic department / PASS unit in which the position sits.
<b>Division / section</b>	The division / section in which the position sits.
<b>Date of compilation</b>	The date on which the position description was compiled, updated or reviewed.
<b>Organogram</b>	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.
<b>Purpose</b>	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 ..."
<b>Key performance areas (KPA)</b>	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.
<b>% of time spent</b>	The percentage of time spent on each key performance area.
<b>Inputs</b>	<p>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:</p> <ul style="list-style-type: none"> <li>• Accurately convey the level of complexity, responsibility and scope</li> <li>• Write at least one associated input for each KPA</li> <li>• Keep as simple and brief as possible</li> <li>• Begin each sentence with an action verb, in the present tense</li> <li>• Sentences must be outcome-based, containing an action, an object and a purpose</li> <li>• Cluster tasks into a list of fewer, broad (but still specific) responsibilities</li> <li>• Refer to operational manuals, policies or to agreed procedures, rather than include the detail of tasks</li> <li>• Avoid <ul style="list-style-type: none"> <li>○ descriptive adverbs and adjectives (e.g. 'Quickly types basic documents', 'Efficiently processes difficult queries')</li> <li>○ pronouns</li> <li>○ jargon</li> <li>○ abbreviations (e.g. 'mgs', 'docs')</li> <li>○ 'tired words' (e.g. 'Manages', 'Contributes to', 'Assists with')</li> <li>○ names</li> </ul> </li> </ul>
<b>Outputs</b>	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).
<b>Minimum qualifications</b>	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.
<b>Minimum experience</b>	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.
<b>Skills</b>	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).
<b>Knowledge</b>	The minimum knowledge required to perform the position. Does not include desirable knowledge. (E.g. Knowledge of UCT's academic administrative systems).
<b>Professional registrations or licenses</b>	The required professional registrations, industry certifications or licences required to perform the position. Does not include desirable ones.
<b>Other requirements</b>	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.
<b>Competencies</b>	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 <a href="#">on the HR website</a> . 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.
<b>Scope of responsibility</b>	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.
<b>Contacts and relationships</b>	A listing of the people, departments or organisations that this position deals with regularly, internal and external to UCT.
<b>Agreed by</b>	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



### Note

In all cases, a copy of this form is sent to the relevant HR Business Partner.

## 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 Business Partner](#) 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