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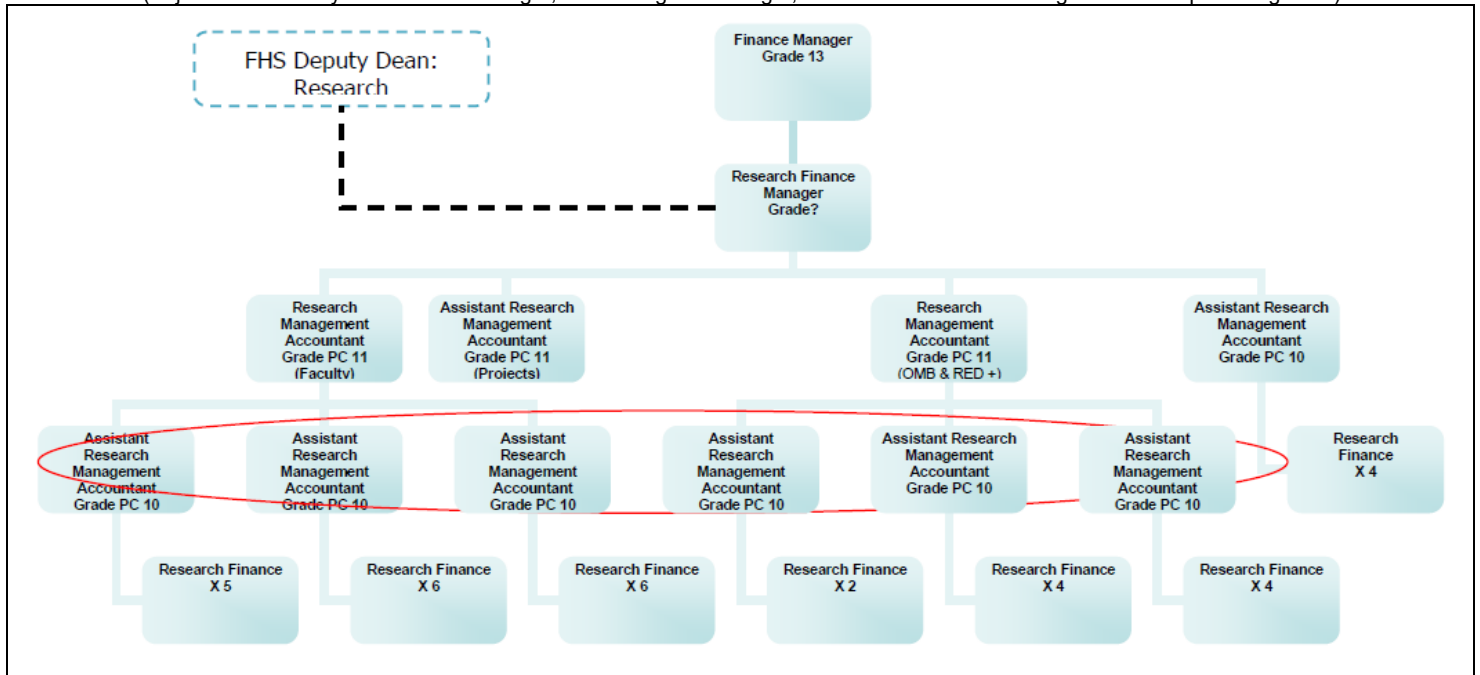
- Forms must be downloaded from the UCT website: <http://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

POSITION DETAILS

Position title	Assistant Research Management Accountant		
Job title (HR Business Partner to provide)			
Position grade (if known)	10	Date last graded (if known)	
Academic faculty / PASS department	Health Sciences		
Academic department / PASS unit	Faculty Finance		
Division / section	Research Finance		
Date of compilation	23 December 2014		

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

As part of Faculty Finance, Research Grants & Finance Unit (RG&F) (a service provider to the Health Sciences research community for financial management and administration of their research grants and contracts), the purpose of the job is to support the Research Management Accountant, Head of Department and Directors in the financial management.

The duties of staff members in HSF have been divided into manageable workloads for each employee. However, there are no hard lines between each job description. Staff members are therefore expected to know all work processes in all finance areas and be able to assist during peak periods, at the discretion of the FM, RFM or RMA, when their colleagues are on leave or workloads are heavy.

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)
E.g.	General and office administration	25%	<p>Takes, types up and distributes minutes and agendas for monthly departmental meeting.</p> <p>Greets visitors, enquires as to the nature of their visit and directs them to the appropriate staff member.</p>	<p>All staff members receive an electronic copy of accurate minutes and agendas, in the departmental template/format, a week before the meeting.</p> <p>Visitors are directed to appropriate staff member in a professional and efficient manner.</p>
1	Staff Management and Training	15%	<ul style="list-style-type: none"> • Review deadlines are adhered to. • Schedule and conduct coaching and progress review, staff and performance evaluation meetings. • Performance Management. 	<ul style="list-style-type: none"> • PDPs for all staff • Moral Soundness • Better/Improved integration of individuals
2	Planning and Budget Management	30%	<ul style="list-style-type: none"> • Facilitate the entire budgeting & financial planning in the dept by: <ol style="list-style-type: none"> 1. Being responsible for the development of financial plans & driving the budgeting process for the dept 2. Ensuring that the department adheres to the planning and budgeting guidelines and financial prescripts. • Provide guidance and assistance to all PI's with the development of business plans & costing of proposals and giving advice on outcomes where necessary, also ensuring that they are in line with faculty and the department's cost recovery mandate and funder policies and procedures. • Co-ordinate, compile and consolidate submissions/inputs related to the department's annual budget. • Submit the department's budget to faculty finance on due date. 	<ul style="list-style-type: none"> • Development of a budget plan which correlates with the departmental strategy and operational plans.

3	Financial Reporting, Analysis & Funds Management – Research & Controlling and Monitoring of Budget	45%	<p><u>Assist and Manage</u> Finance staff in performing the following tasks:</p> <ul style="list-style-type: none"> • Set up Finance Service Level Agreements (SLA) with each unit / project on financial procedures, roles and responsibilities, and what regular management reports will be provided. • Maintain a research funds database to track spending rules, budget allocations and deliverables due by referring to the contract or Converis Electronic Research Administration (ERA). • Maintain financial authorization procedures and limits in compliance with UCT and Institute’s policies. • Administer the opening, closing and housekeeping of Departments funds. • Ensure journals, and invoice and receipt requisitions are properly prepared and checked for submission to Faculty Finance for authorization. • Monitor and invoice for spend and claim contracts on a monthly/quarterly/bi-annual/annual basis, as determined by the research agreement. • Run SAP contracts Deliverables Due list on a monthly basis to ensure deliverables are met: <ol style="list-style-type: none"> 1. Manage the release of invoices with deliverables attached by reminding the PI of due dates (research reports and financial statements). Report status to Faculty Finance. 2. Monitor financial statement due dates to funders. Responsible for the review and signing of standard financial statements to funders. 3. Assist with debt recovery where requested by Debtors or Faculty Finance. 4. Submit monthly report on deficit funds to Research Management Accountant. • Liaise with Faculty Finance in terms of: <ol style="list-style-type: none"> 1. Agency Grants administration which is handled via Faculty or Central Finance e.g. MRC, NRF and THRIP 2. Audits for individual grant or contracts • Design and prepare monthly, quarterly and annual management reports for the Research Management Accountant & Faculty Finance Manager 	<ul style="list-style-type: none"> • Prompt and timely reporting of financial status or performance of the department • Evaluation and interpretation of actual performance against plan and exercised budgetary control • Report any variances against budget • Budget is spent against planned activities. • Expenditure is charged against a budget to avoid overspending within line items • Funds are not in deficit
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4	General	10%	<ul style="list-style-type: none"> • Support to the Research Management Accountant where required • Sustainability of Finances including research Division and Units • Responsible for completing special projects assigned by Faculty Finance RMA. • Has delegated authority for sign-off of : <ul style="list-style-type: none"> 1. HR forms for appointments against research funds 2. Petty cash reimbursements • Assist Faculty Finance in developing and drafting Finance Procedures and Internal Control Management Plans • Assist with Ad Hoc projects 	<ul style="list-style-type: none"> • Financial Management support • Support to the Research Management Accountant

MINIMUM REQUIREMENTS

Minimum qualifications	An appropriate accounting qualification (BCom or other equivalent accounting or management accounting / costing qualification) OR equivalent experience, equating to 7 years with similar/same responsibilities as sought for this position.			
Minimum experience (type and years)	A minimum of 5 years' experience with exposure to various aspects of finance and accounting with at least 2 years' supervisory level in a large or medium size organizational environment.			
Skills	Staff Management Staff Training Proficiency in MS Excel Ability to prioritise Excellent oral and written communication skills Sound interpersonal skills			
Knowledge	ERP Experience / SAP Experience Advantageous Research grant finance experience 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'.)	Broad Knowledge and understanding of financial and management accounting principles, with proven analytical and interpretive abilities and report writing skills. Computer literacy at an intermediate to advanced level. Ability to interact successfully with clients at all levels regarding financial matters, and to provide related advice, coaching and training.			
Competencies (Refer to UCT Competency Framework)	Competence	Level	Competence	Level
	Analytical Thinking/Problem Solving	2	Initiating Action/Initiative	2
	Building Interpersonal Relationships	2	Managing Conflict	2
	Building Partnerships	2	Negotiation	2
	Client/Student Service and Support	2	People Management	2
	Communication	2	Professional Knowledge and Skill	2
	Continuous Learning	2	Resource Management	2
	Decision Making/Judgement	2	Stress Tolerance	2
	Facilitating Change	2	University Awareness	2
	Follow Up	2	Written Communication	2
Individual Leadership	2			

SCOPE OF RESPONSIBILITY

Functions responsible for	Staff supervision Day-to-day financial administration and management of grants Review and approval of financial reports in line with funder requirements Communication of financial and purchasing policies and procedures to researchers and other staff Preparation of costing budgets for research proposals Any other tasks appropriate to this position
Amount and kind of supervision received	As required by Research Management Accountant
Amount and kind of supervision exercised	Staff supervision Review and approval of financial deliverables
Decisions which can be made	Decisions in line with funder conditions and UCT Finance and HR policies and procedures and this position description
Decisions which must be referred	Decisions not clearly spelt out by funder conditions and UCT policies and procedures, or outside the scope of this position description

CONTACTS AND RELATIONSHIPS

Internal to UCT	Stakeholders within departments and units in Health Sciences; colleagues in Central Departments
External to UCT	External funders/donors