**Job Family**  
Finance

**Job Function**  
Loan Origination

**Category**  
Supervisory & Management

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**Job Summary**

Involves implementing loan origination processes associated with the University’s Mortgage Loan Programs, including the Mortgage Origination, Graduated Payment, Interest Only, and Supplemental Home Loan Programs. Includes the origination and funding of new loans to faculty and Senior Managers to assist in recruitment and retention efforts. Activities include processing and evaluating loan application materials, drawing loan documents, preparing loan funding requests and ensuring that loan applications are evaluated in accordance with University policy and applicable industry standards.

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**Job Level**  
Manager 1  
Manager 2  
Manager 3  
Manager 4

**Job Title**  
Loan Origination Manager 1  
Loan Origination Manager 2  
Loan Origination Manager 3  
Loan Origination Manager 4

**Job Code**  
0612 – OP ONLY  
0611 – OP ONLY

**Tracking Code**  
A0768  
A0769

**Per. Program**  
MSP  
MSP  
MSP  
MSP

**FLSA**  
Exempt  
Exempt  
Exempt  
Exempt

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**Generic Scope**

Spends the majority of time (50% or more) achieving organizational objectives through the coordinated achievements of subordinate staff. Establishes departmental goals and objectives, functions with autonomy. Manages the accountability and stewardship of human, financial, and often physical resources in compliance with departmental and organizational goals and objectives. Ensures subordinate supervisors and professionals adhere to defined internal controls. Manages systems and procedures to protect departmental assets.

Oversees through subordinate managers a large department or multiple smaller units, OR manages a highly specialized technical function / team. Has significant responsibility to achieve broadly stated goals through subordinate managers. Determines objectives, directs programs, develops strategies and policies, manages human, financial, and physical resources, and functions with a high degree of autonomy. Proactively assesses risk to establish systems and procedures to protect organizational assets. Determines strategies for a program with organization-wide impact.

Oversees through subordinate Managers one or more large, complex departments or business units with multiple functional disciplines / occupations, OR manages a program, regardless of size, that has critical impact upon the organization as a whole, such as most or all of a campus, medical center, UCOP or the UC System. Has significant responsibility for formulating and administering policies and programs, manages significant human, financial, and physical resources, and functions with a very high degree of autonomy. Oversees through subordinate Managers the accountability and stewardship of department resources and the development of systems and procedures to protect organizational assets.

Directs through subordinate Managers multiple large and complex critical programs impacting broad constituencies across major portions of the organization. Identifies objectives, manages very significant human, financial, and physical resources, and functions with an extremely high degree of autonomy. Accountable for formulating and administering policies and programs for major functions. Operational or program results can affect overall organization-wide performance and reputation. Directs through subordinate Managers the development of strategic goals and objectives to achieve accountability and stewardship of university resources in a manner consistent with system-wide objectives and initiatives.

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**Custom Scope**

Receives assignments in the form of objectives and determines how to use resources to meet schedules and goals. Reviews and approves recommendations for functional programs. Provides guidance to subordinates to achieve goals in accordance with established policies. Erroneous decisions or failure to achieve goals results in additional costs and personnel, and serious delays in overall schedules.

Makes decisions on loan origination and servicing matters and ensures achievement of objectives. Establishes strategic plans and objectives on loan origination and servicing matters. Delegates assignments to subordinates and ensures achievement of objectives. Objectives are reviewed by senior management to determine success of operation. Reviews and approves recommendations for operational planning and control. Erroneous decisions will have a serious impact on the overall success of department, division, or campus.

Provides direction and expertise to section / department, projects and centralized loan origination activities.

Provides leadership, direction and expertise to department, projects or centralized loan origination and servicing activities which includes
Job Family: Finance  
Job Function: Loan Origination  
Category: Supervisory & Management

Job Summary
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| Key Resp 02 | Responsible for staffing, budgets, costs, productivity and human resource-related activities pertaining to assigned staff members. | Full responsibility for staffing, budgets, costs, productivity and human resource-related activities pertaining to department staff members. |
| Key Resp 03 | Develops, recommends, and implements policies and procedures for loan origination. | Oversees analysis and policy development for issues and processes. |
| Key Resp 04 | Ensures the accuracy and control of loan origination data. | Leads efforts to design, develop and implement systems that ensure the accuracy and control of financial data and reporting. |
| Key Resp 05 | Meets all government reporting requirements for loan origination activities. | Meets all government reporting requirements for loan origination and servicing activities. |
| Key Resp 06 | Manages, through subordinate supervisors, the coordination of activities of a department with responsibility for results in terms of costs, methods, and employees. | Manages the activities of loan origination and servicing through several subordinates having overall responsibility for functional programs. |
| Key Resp 07 | Responsibility for loan origination. | Advises senior management on controversial situations, customer negotiations, or influencing and persuading other senior level managers. |

Key Resp 08
Key Resp 09
Key Resp 10
Key Resp 11
Key Resp 12
Key Resp 13
Key Resp 14
Key Resp 15

Education 1 Bachelor’s degree in Business Administration, Real Estate or related field.  
Education 2 Advanced degree desired.  
Education 3  
Education 4  
License 1 Real Estate license desired.  
License 2  
License 3
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License 4
Cert 1
Cert 2
Cert 3
Cert 4
Spec Cond 1
Spec Cond 2
Spec Cond 3
Spec Cond 4

KSA 01 Ability to independently perform advanced financial analysis and formulate recommendations based upon the results of the analysis.

KSA 02 Excellent ability to independently perform advanced financial analysis and formulate recommendations based upon the results of the analysis.

KSA 03 Excellent oral and written communication skills to communicate with program clients at all levels of the organization.

KSA 04 Outstanding oral and written communication skills to communicate with program clients at all levels of the organization.

KSA 05 Advanced user of common desktop and web applications.

KSA 06 Advanced user of common desktop and web applications.

KSA 07 Advanced knowledge of standard mortgage industry origination and servicing systems.

KSA 08 Excellent knowledge of industry best practices.

KSA 09 Excellent knowledge of the full range of mortgage industry origination and servicing systems.

KSA 10 Excellent knowledge of the full range of mortgage industry origination and servicing systems.

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**KSA 10**
Excellent ability to perform policy and operational analyses.

**KSA 11**
Excellent experience managing complex accounting and reconciliation processes.

**Environment**
Office setting

Campus, medical center or other university setting and various external venues.

**Career Path 1**
Loan Origination Mgr 2

Supervisory and Management > Finance

**Career Path 2**
Career Path open