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<td>Job Function</td>
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<td>Category</td>
<td>Supervisory &amp; Management</td>
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<tr>
<th>Job Level</th>
<th>Manager 1</th>
<th>Manager 2</th>
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<td>Job Title</td>
<td>Financial Aid Manager 1</td>
<td>Financial Aid Manager 2</td>
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<td>Job Code</td>
<td>0307</td>
<td>0308</td>
<td>0309</td>
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<td>Tracking Code</td>
<td>A0663</td>
<td>A0664</td>
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<td>Per. Program</td>
<td>MSP</td>
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<td></td>
</tr>
<tr>
<td>FLSA</td>
<td>Exempt</td>
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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.

- Manages a financial aid program for a functional area, oversees operations, and recommends changes to policies and procedures to ensure accurate, efficient, and timely delivery of student aid that is in compliance with regulations and supports departmental objectives.

- Manages several financial aid programs. Oversees internal operations and participates in formulating financial aid policy and fund utilization strategies to ensure accurate, efficient, and timely delivery of student aid that is in compliance with regulations and supports departmental objectives.

- Formulates organization financial aid policy and fund utilization strategies to support University strategic goals. Participates in development of industry regulations. Has ultimate organization responsibility for accurate, efficient, and timely delivery of student aid in compliance with regulations.

**Custom Scope**

- Participates in the development of policy and strategies for recruitment and retention of students through financial aid programs of functional area.

- Develops policy and strategies for recruitment and retention of students through financial aid programs.

- Develops policy and strategies for recruitment and retention of students through financial aid programs.

- Manages institutional research and analysis for functional area.

- Directs institutional research and analysis to support forecasting and strategic planning.

- Directs institutional research and analysis to support forecasting and strategic planning.

- Participates in interpreting complex historical data and forecasts.

- Interprets complex historical data and forecasts to identify trends in affordability and accessibility of organization education.

- Interprets complex historical data and forecasts to identify trends in affordability and accessibility of organization education.

- Manages 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 systemwide objectives and initiatives.

**Per. Program**

- MSP

**FLSA**

- Exempt

**Tracking Code**

- A0663
- A0664
- A0665

**Exempt**
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<tr>
<th>Key Resp 04</th>
<th>Participates in planning and utilization of federal, state, University, and agency funds for functional area to determine the most effective distribution of funds, given availability, government awarding parameters, and University goals.</th>
<th>Participates in the development of strategic policy initiatives to mitigate trends.</th>
<th>Develops and recommends strategic policy initiatives to mitigate trends.</th>
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<td>Key Resp 05</td>
<td>Oversees internal control structure for functional area.</td>
<td>Manages operations. Provides direction to subordinate managers and / or supervisors.</td>
<td>Represents organization to and advises the federal and state government on financial aid issues.</td>
</tr>
<tr>
<td>Key Resp 06</td>
<td>Participates in annual financial and programmatic audits.</td>
<td>Develops and implements budgets for managed functions.</td>
<td>Participates in the development of industry regulations.</td>
</tr>
<tr>
<td>Key Resp 07</td>
<td>Manages operations of functional area.</td>
<td>Makes decisions on performance, salary actions, hiring, and other human resources related issues of managed staff.</td>
<td>Advises the organizational senior leadership on financial aid issues.</td>
</tr>
<tr>
<td>Key Resp 08</td>
<td>Provides direction to subordinate supervisors and / or staff.</td>
<td>Participates in planning and utilization of federal, state, University, and agency funds to determine the most effective distribution of funds, given availability, government awarding parameters, and University goals.</td>
<td>Represents organization to donors, student groups, and the media on financial aid issues.</td>
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<tr>
<td>Key Resp 09</td>
<td>Makes decisions on performance, salary actions, hiring, and other human resources related issues of managed staff.</td>
<td>Oversees accounting and internal control structure and ensures protection of assets.</td>
<td>Directs planning and utilization of federal, state, University, and agency funds to determine the most effective distribution of funds, given availability, government awarding parameters, and University goals.</td>
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<tr>
<td>Key Resp 10</td>
<td>Ensures compliance of financial aid policies and programs with federal, state, University, agency, and donor laws, regulations, policies, and terms.</td>
<td>Participates in annual financial and programmatic audits.</td>
<td>Negotiates and coordinates with Controller to develop student aid accounting structure, controls, and procedures.</td>
</tr>
<tr>
<td>Key Resp 11</td>
<td>Ensures security of private information.</td>
<td>Maintains current knowledge of applicable rules and standards of the Pacific-10 Conference, the National Collegiate Athletic Association (NCAA), as well as other associations and agencies to which the organization of the University of California adheres, and, at all times, avoids any and all violations of these rules and standards.</td>
<td>Ensures protection of assets.</td>
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<tr>
<td>Key Resp 12</td>
<td>Recommends and manages development of IT systems and interfaces with external systems to effect efficient delivery and reporting of student aid for functional area.</td>
<td>Ensures compliance of financial aid policies and programs with federal, state, University, agency, and donor laws, regulations, policies, and terms.</td>
<td>Represents organization to auditors.</td>
</tr>
<tr>
<td>Key Resp 13</td>
<td>Maintains current knowledge of applicable rules and standards of the Pacific-10 Conference, the NCAA, as well as other associations and agencies</td>
<td>Ensures security of private information.</td>
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### Job Function: Financial Aid

#### Category: Supervisory & Management

**Job Summary:** Involves analyzing students' level of need and eligibility for financial aid to allocate financial aid awards and advise students on obtaining aid. Interprets financial aid regulations, analyzes student data, and implements procedures to ensure regulatory compliance and timely delivery of financial aid.

| Key Resp 14 | Directs development of IT systems and interfaces with external systems to effect efficient delivery and reporting of student aid. |
| Key Resp 15 | Negotiates and coordinates with other UC departments in the development of common IT systems and interfaces as it concerns financial aid and related activities. |

| Education 1 | Bachelor's degree in related area and / or equivalent experience / training. |
| Education 2 | Bachelor's degree in related area and / or equivalent experience / training. |
| Education 3 | Bachelor's degree in related area. Advanced degree preferred. |

### Education 4

**License 1**

**License 2**

**License 3**

**License 4**

**Cert 1**

**Cert 2**

**Cert 3**

**Cert 4**

**Spec Cond 1**

**Spec Cond 2**

**Spec Cond 3**

**Spec Cond 4**

| KSA 01 | Strong knowledge of policies, regulations, and practices for awarding financial aid, including needs analysis and packaging. |
| KSA 02 | Working knowledge of techniques for recruitment and retention of students through financial aid. |
| KSA 03 | Thorough knowledge of University policies, processes, and procedures, including those related to budget, accounting, and other related activities. |

*to which the organization of the University of California adheres, and, at all times, avoids any and all violations of these rules and standards.*
## Job Family
- Student Services

## Job Function
- Financial Aid

## Job Summary
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## Job Function
- Financial Aid

## Category
- Supervisory & Management

### KSA 04
- Strong knowledge of advising and counseling techniques.
- Advanced knowledge of advising and counseling techniques.
- Expert knowledge of advising and counseling techniques.

### KSA 05
- Ability to interpret complex policies and develop procedures to ensure compliance.
- Advanced skills in policy and program development.
- Expert skills in policy and program development.

### KSA 06
- Thorough problem identification, critical thinking, and problem solving skills; judgment and decision-making ability.
- Advanced problem identification, critical thinking, and problem solving skills; judgment and decision-making ability.
- Expert problem identification, critical thinking, and problem solving skills.

### KSA 07
- Strong quantitative analysis and resource management skills.
- Advanced quantitative analysis and resource management skills.
- Expert quantitative analysis and resource management skills.

### KSA 08
- Organizational skills and ability to prioritize work for self and others to meet deadlines; project management skills.
- Skill and experience in project management and organizational effectiveness.
- Advanced skills and experience in project management and organizational effectiveness.

### KSA 09
- Strong written and verbal communication, active listening, persuasion, and negotiation skills.
- Advanced written and verbal communication, active listening, persuasion, and negotiation skills.
- Expert written and verbal communication, active listening, persuasion, and negotiation skills.

### KSA 10
- Strong customer service orientation.
- Advanced customer service orientation.
- Skills in innovation and advanced techniques to empower a customer service orientation throughout the organization.

### KSA 11
- Ability to assess processes and implement improvements.
- Strong ability to assess processes and implement improvements.
- Advanced ability to assess processes and facilitate the development and implementation of improvements throughout the organization.

### KSA 12
- Interpersonal skills including social perceptiveness.
- Advanced interpersonal skills including social perceptiveness.
- Expert interpersonal skills including social perceptiveness and the ability to use this in negotiations and discussions with others.

### KSA 13
- Experience using complex databases. Ability to define specifications for database programming.
- Experience using complex databases. Strong ability to oversee and define specifications for financial aid systems programming.

### KSA 14

### KSA 15

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

### Career Path 1
- Financial Aid Mgr 2

### Career Path 2

### Career Path 3

### Career Path 4

### Career Path 5

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Last Revised: 08 December 2016
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Career Path 6