University of Edinburgh

1. Job Details

Job title: Head of Scholarships and Student Finance  
School/Support Department: Student and Academic Services Group  
Unit (if applicable): Registry  
Line manager: Head of Operations

2. Job Purpose
To manage and deliver Scholarships and Student Finance Services to meet the needs of staff, current and prospective students of the University whilst ensuring that the service’s policies and resources are developed and promoted to support the University’s strategic objectives on recruitment and retention of students and for widening participation.

3. Main Responsibilities

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<th>Approx. % of time</th>
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<td>1. Responsible for how Scholarships, Student Finance support and fee recovery within the University is developed, organised, managed and promoted. This includes leadership, strategic planning and the deployment of staff resources. As part of this developing and implementing effective and efficient business processes for the promotion and allocation of donated funds to eligible students, both those managed centrally and those where there is devolution to College and School level. This includes ensuring that statutory audit responsibilities are met, by the development of good financial practices and by publishing accurate financial records of all scholarship funds and endowments, both at central and devolved levels. In this post there is a strong element of change management which includes initiating and leading innovative change to business systems and processes to achieve cost effective business delivery and higher service levels to staff and students.</td>
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<td>2. Responsible for the University’s Scholarship Project which involves not only the development of policy but also the promotion of scholarships and contributing to the development of links with potential donors. This includes responsibility for supporting the work of the Vice-Principal for Scholarships and Widening Participation by initiating and contributing to policy developments on scholarship funding and provision; advising and guiding the Scholarship Strategy Group on all matters relating to scholarships and financial aid. This involves interpreting changes in government legislation and advising on how these should be implemented as well as the identification and assimilation of good practice from elsewhere in the Higher Education sector.</td>
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<td>3. Contributing to policy development on all aspects of fee recovery as a member of the Fee Co-ordination Group and the Fee Strategy Committee as well as ensuring that the University recovers the maximum amount of fee income via accurate fee prediction.</td>
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4. Planning and Organising
- Strategy and Policy development takes at least a year from the initial idea to application.
- The PR programme for Scholarships and Student Finance is organised between 6 months and 1 year ahead.
- Planning the work of the group including a programme of business process re-engineering is done on a yearly basis which involves planning personal work on a quarterly calendar – the majority of this work is project based and is self initiated.
- Planning and organising the different Scholarship and Bursary Committees. These meetings are set 6 months ahead.
Planning, organising and executing the University’s Annual Awards Ceremony.
In conjunction with the Deputy Head of Group planning/reviewing the workloads of the section on a quarterly/monthly/weekly basis ensuring that the milestones are being achieved and that the daily on-going service demands are being met.

5. Problem Solving
- Ensuring that the milestones for service delivery for all activities are met. This is crucial to the institution as fee recovery would be affected and poor service delivery on scholarships would have a direct impact on the financial well-being of the students and could bring the institution into disrepute.
- Seeking new business solutions to improve the effective management of fee assessment and recovery which impacts on the financial well-being of the institution.
- Guiding and directing the Development Office on university funding priorities to ensure that funds received are targeted at priority areas including examining all draft agreements with individual donors and external sponsors to ensure that equality and diversity policies are met.
- Proactively assessing the impact of changes to legislation with reference to fees and anticipating what actions the institution needs to take to ensure effective fee recovery.
- Setting up a new online database promoting University Scholarships and student funding opportunities which lists nearly 200 different awards and which is unique among our major HE competitors.
- Constantly monitoring service delivery and assessing the effectiveness of the current business processes looking for opportunities to work smarter.
- Personal input into University Projects such as Student Debt Management, RAE, EUCLID etc which involves looking for new business solutions to ensure the delivery of new policies.

6. Decision Making
- Developing the communication strategy for Scholarships and Student Support each year ensuring that it reflects the current strategic targets.
- Recommending to the Director of Registry and Head of Operations new business process solutions to improve the efficiency of and to increase the levels of service to the client groups and to improve the current administration and business systems.
- Reviewing fee status appeals and deciding if adjustments are required. This involves an in depth understanding of complex fee regulations and using judgement to ensure equity of treatment.
- Deciding on the organisation and management of the activities of the group including the deployment of the staff resource to achieve the group’s performance targets.
- Influencing the operational decisions of Registry as a member of the Operational Management Team.
- Determining which applications for Scholarships and Bursaries will be recommended for funding to the relevant committees.
- Giving advice and direction on Scholarships and Student Funding Opportunities to Colleges/Schools and students.
- Setting the benchmarks for the performance indicators for delivery of the group’s services in a customer focussed environment.
- Deciding which issues needs to be drawn to the attention of Planning and the Fee Co-ordination group and the Fee Strategy Committee relating to fee setting.

7. Key Contacts/Relationships
Working relationship with:-
- The Vice Principals for Scholarships and Widening Participation, Development and Alumni, and International Relations to offer advice on student funding objectives and priorities.
- The other Heads of Group within Registry and the Head of Operations as part of the Operational Management Team.
- The Principal, Vice-Principals for Scholarships and Widening Participation and Development & Alumni, Heads of College, and Director of Planning as a member of senior committees.
- The donors to ensure that their expectations are being well managed.
- Staff within the major funding bodies including the British Council, Universities UK, Association of Commonwealth Universities, Research Councils with whom effective relationships are developed in pursuit of the university’s scholarships and student funding objectives.
- The Assistant Director of Finance and auditors to coordinate the annual US Federal Stafford loans audit process for the University.
CPA and Medical Illustrations on the development of new communications materials.
The EUCLID Project team to ensure that the new student system facilitates the award of bursaries, scholarships and studentships, and provides the necessary information for the accurate allocation of tuition fees.
Administrative staff in Planning on issues relating to fees.
Senior Staff in Finance on issues relating to fee and debt recovery.
Colleges and Schools to develop a cohesive institutional approach to the management of Scholarships and Bursaries.

8. Knowledge, Skills and Experience Needed for the Job
- Educated to degree level with more than five years of Higher Education experience in a Scholarships and Student Funding environment.
- Leadership – be able to manage complex relationships, establish and maintain trust and support, adaptable personal style to suit diverse situations.
- Strategic Planning – proven track record of implementing organisational change. Must be able to deliver change not just design it.
- Communication – must be analytical, able to communicate effectively internally and externally using a range of media.
- Entrepreneurial – able to innovate, create and motivate. Must have experience of developing/cultivating donor relationships.
- Negotiation – able to present effective case for change and can respond flexibly to opposing viewpoints.
- Good organisational skills and have the ability to prioritise and work under pressure.
- Systems development – able to devise effective and efficient business systems for allocating scholarships and associated record keeping.

9. Dimensions
- Influencing and directing the work of a large group which covers a diverse range of financial services to students which impacts on student recruitment and retention as well as fee recovery which ultimately impacts on the University’s financial well-being.
- Annual value of student funding of £6.3 Million which includes US Student Loans with an annual value of over £2.5 Million; hardship funds of over £700,000; Staff Scholarships of over £350,000; and scholarships of over £2.1 Million.
- Contributing to the development of new sources of Scholarship and Bursary funding to the value of £1.5 Million from the Development Trust.
- Research costs an other related fees of over 22,500 students which provides an annual revenue of £60M.

10. Job Context and any other relevant information
This post is responsible for two key areas of activities which impacts on student recruitment and retention and the assessment and recovery of fees both of which impacts on the financial well-being of the institution.