

Financial Services Analyst (4628C), Technology
Licensing - 80180
University of California, Berkeley

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Posted Aug. 5, 2025, set to expire Jun. 30, 2026

Job Title	Financial Services Analyst (4628C), Technology Licensing - 80180
Department	
Institution	University of California, Berkeley Berkeley, California
Date Posted	Aug. 5, 2025
Application Deadline	Open until filled
Position Start Date	Available immediately
Job Categories	Professional Staff
Academic Field(s)	Fiscal Services Finance/Investment Management
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Job Description

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University of California, Berkeley

About Berkeley

At the University of California, Berkeley, we are dedicated to fostering a community where everyone

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feels welcome and can thrive. Our culture of openness, freedom and belonging make it a special place for students, faculty and staff.

As a world-leading institution, Berkeley is known for its academic and research excellence, public mission, diverse student body, and commitment to equity and social justice. Since our founding in 1868, we have driven innovation, creating global intellectual, economic and social value.

We are looking for applicants who reflect California's diversity and want to be part of an inclusive, equity-focused community that views education as a matter of social justice. Please consider whether your values align with our [Guiding Values and Principles](#), [Principles of Community](#), and [Strategic Plan](#).

At UC Berkeley, we believe that learning is a fundamental part of working, and provide space for [supportive colleague communities via numerous employee resource groups](#) (staff organizations). Our goal is for everyone on the Berkeley campus to feel supported and equipped to realize their full potential. We actively support this by providing all of our full-time staff employees with at least 80 hours (10 days) of paid time per year to engage in professional development activities. Find out more about how you can [grow your career](#) at UC Berkeley.

Departmental Overview

The Office of Intellectual Property and Industry Research Alliances (IPIRA) is the portal for industry access to Berkeley, both for research relationships and access to Berkeley technology. The Office of Technology Licensing (OTL) and the Industry Alliances Office (IAO) are peer divisions within IPIRA. The OTL manages and licenses patent and copyrights to the private sector for commercial development; is responsible for material transfer agreements for transfers from Berkeley; supports entrepreneurial activities including start-up company formation; maintains relationships with sources of private capital and service providers; provides litigation support; advises the IAO on intellectual property terms in research and other contracts, and advises the campus on intellectual property, innovation and entrepreneurship.

The IAO is responsible for a wide range of research relationships with industry, including industry-sponsored research agreements, collaboration agreements, membership agreements such as for industrial consortia, and incoming material transfer agreements.

Position Summary

The Financial Services Analyst 3 (FSA 3) reports to the Business Operations and Compliance Director, and manages the financial operations of three “peer” units, the OTL, the IAO and IPIRA, and performs license, compliance and financial analysis. The duties include certain elements of contract drafting,

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license enforcement, processing and servicing of a variety of operational and financial transactions and services, including cashiering, payroll, purchasing, accounts receivable, accounts payable, collections, data collection and data entry, analysis, review and control, customer servicing, and reporting. The Finance Service Analyst 3 acts as the liaison for financial transactions between the Office of Technology Licensing and the Office of Innovation and Entrepreneurship at UCOP, and also between the OTL and research departments on campus, especially in the context of distributions of “research” income to the departments. On financial and budget matters, the FSA 3 acts as the liaison between the Office of Technology Licensing and the budget Director of the Office of the Vice Chancellor for Research. The Finance Services Analyst 3 is a technical expert in the area of technology licensing office operations, organization and IP financial management. The FSA 3 is frequently contacted by other UC campus tech transfer offices as well as LBNL.

Application Review Date

The First Review Date for this job is: 08/15/2025.

Responsibilities

OTL FINANCIAL MANAGEMENT AND ACCOUNTING

- Manages the financial terms of a high volume of patent and copyright license agreements, most involving significant complexity, tracking license issue fees, maintenance fees, minimum royalties, earned royalties, milestone payments and patent cost reimbursements.
- Tracks due diligence requirements as it pertains to corresponding fees to ensure compliance with the terms of the agreement.
- Drafts financial amendments, initiates collections or suggests agreement termination when licensee is out of compliance.
- Oversees and participates in the distribution of the inventor shares, joint holder shares, research and department shares, campus shares and general fund share per three different patent policies and one copyright policy.
- Serves as the technical expert in the area of intellectual property financial management fielding questions from other UC campus offices as well as LBL.
- Monitors the entry of all financial data into the Patent Tracking System.
- Generates financial reports on a monthly basis; analyzes data and prepares adjunct reports for the IAO and OTL directors as well as the AVC of IPIRA and the Budget Director of the VCRO. Participates in UC audits and licensee audits.

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IPIRA FINANCIAL MANAGEMENT AND ACCOUNTING

- Manages and directs all aspects of the financial services for IPIRA. This includes cashiering of receipts (fees, royalties, patent costs reimbursements), purchasing of supplies, equipment, conference registrations, memberships, travel and entertainment reimbursements, OPTRS payroll transactions, financial data collection and data entry into the Patent Tracking System and the Berkeley Financial System (BFS).
- Reviews and approves all disbursements through BFS.
- Prepares journal entries, maintains and reconciles general ledger accounts for the OTL, IAO and IPIRA.

INTELLECTUAL PROPERTY COMPLIANCE MANAGEMENT

- Drafts amendments and short- term letter agreements for all licensing staff.
- Manages licensee due diligence and reporting requirements of a high volume of intellectual property and copyright license agreements to ensure compliance with the terms of the agreement.
- Consults with licensees to discuss diligence, reporting, and overall compliance issues.
- Monitors and analyzes due diligence reports on a monthly basis and works with licensing officers and licensees in resolving outstanding issues. Interpret research agreement terms and meet sponsor IP reporting obligations.
- Monitors the entry of licensing data into the Patent Tracking System and maintains integrity of information.

SPECIAL PROJECTS

- Perform special projects as required, i.e. reviewing and closing of inactive cases, analyzing data and providing information to UCOP for the annual report.

Required Qualifications

- Thorough knowledge of financial processes, policies and procedures.
- Thorough knowledge of financial data management and reporting systems.
- Strong proficiency in the use of spreadsheet and database software.
- Knowledge of and experience with intellectual property administration, laws and policies.
- Knowledge of and experience with patent prosecution, patent maintenance and patent law.
- Knowledge of and experience with interpreting contract and agreement terms.
- Expert knowledge of and/or can quickly learn campus processes, protocols and procedures with

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a focus on budget, account and fund management.

- Expert knowledge of financial analysis and reporting techniques; planning; accounting, payroll and purchasing.
- Interpersonal skills to effectively motivate others.
- Strong interpersonal skills, analytical skills, service orientation, active listening, critical thinking, attention to detail, ability to multi-task in a high-volume environment, organizational skills, effective verbal and written communication skills, sound judgment and decision making; ability to develop original ideas to solve problems.
- Ability to function effectively as a member of a team.
- Ability to adapt to changing priorities.
- Thorough knowledge and understanding of internal control practices and their impact on protecting University resources.
- Leadership skills to provide guidance, coaching and mentoring to professional and support staff.
- Bachelor's degree in related area and/or equivalent experience/training.

Salary & Benefits

For information on the comprehensive benefits package offered by the University, please visit the University of California's [Compensation & Benefits](#) website.

Under California law, the University of California, Berkeley is required to provide a reasonable estimate of the compensation range for this role and should not offer a salary outside of the range posted in this job announcement. This range takes into account the wide range of factors that are considered in making compensation decisions including but not limited to experience, skills, knowledge, abilities, education, licensure and certifications, analysis of internal equity, and other business and organizational needs. It is not typical for an individual to be offered a salary at or near the top of the range for a position. Salary offers are determined based on final candidate qualifications and experience.

The budgeted annual salary range that the University reasonably expects to pay for this position is \$101,000.00 - \$128,000.00.

- This is a full-time (40 hours/week), career position that is eligible for UC Benefits.
- This is an exempt monthly-paid position.

How to Apply

- To apply, please submit your resume and cover letter.

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Other Information

This position is governed by the terms and conditions in the agreement for the Clerical & Allied Services Unit (CX) between the University of California and Teamsters Local 2010. The current bargaining agreement manual can be found at: <http://ucnet.universityofcalifornia.edu/labor/bargaining-units/cx/index.html>

- This is not a visa opportunity.
- This position is eligible for up to 100% remote work. Exact arrangements are determined in partnership with your supervisor to meet role responsibilities and department needs, and are subject to change.

Conviction History Background

This is a designated position requiring fingerprinting and a background check due to the nature of the job responsibilities. Berkeley does hire people with conviction histories and reviews information received in the context of the job responsibilities. The University reserves the right to make employment contingent upon successful completion of the background check.

Misconduct

SB 791 and AB 810 Misconduct Disclosure Requirement: As a condition of employment, the final candidate who accepts a conditional offer of employment will be required to disclose if they have been subject to any final administrative or judicial decisions within the last seven years determining that they committed any misconduct; received notice of any allegations or are currently the subject of any administrative or disciplinary proceedings involving misconduct; have left a position after receiving notice of allegations or while under investigation in an administrative or disciplinary proceeding involving misconduct; or have filed an appeal of a finding of misconduct with a previous employer.

“Misconduct” means any violation of the policies or laws governing conduct at the applicant’s previous place of employment, including, but not limited to, violations of policies or laws prohibiting sexual harassment, sexual assault, or other forms of harassment, discrimination, dishonesty, or unethical conduct, as defined by the employer. For reference, below are UC’s policies addressing some forms of misconduct:

[UC Sexual Violence and Sexual Harassment Policy](#)

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[UC Anti-Discrimination Policy](#)

[Abusive Conduct in the Workplace](#)

Equal Employment Opportunity

The University of California is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age, protected veteran status, or other protected status under state or federal law.

Contact Information

Please reference Academickeys in your cover letter when applying for or inquiring about this job announcement.

Contact

N/A

University of California, Berkeley

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