

Post Specification

Post Specification - Key Information

- **Post Title:** Financial Services Team Leader
- **Date:** June 2025
- **Post Group Number:** 7945
- **Job Family:** Business Support
- **Job Family Role Profile:** BS9
- **Final Grade:** Grade 9

To be read in conjunction with the job family role profile.

Service Area Description

The Financial Services Team Leader is part of the Finance Service specifically providing transactional services, cash receipting and income management, to support VAT returns, bank reconciliation, control accounting and reconciliations.

The post has line management responsibility and will support the relevant legacy systems, their harmonisation, and retirement, as well as support the future relevant system solutions.

Purpose of this Post

To deliver a high-quality service that meets the customer needs, whilst optimising technology and improved processes to deliver an excellent customer experience.

To improve the outcomes for the people of Cumbria, both internal and external customers, through management of the daily operational delivery of robust, efficient, and effective customer focussed teams across a range of financial services.

To manage the performance of the team to deliver high standards across a range of services, embedding the culture and ways of working within the Finance Service.

Key Job Specific Accountabilities

1. To supervise, recruit, develop and motivate staff teams to achieve effective and efficient performance. Responsible for performance appraisals of staff team and appropriate development reviews identifying key training needs and ensure continuous professional development.
2. To organise and co-ordinate day to day allocation of workflow throughout the team, ensuring service priorities are met, the team are effectively targeted, whilst operating in accordance with established procedures.
3. Making day to day operational decisions and dealing with complex operational issues, queries complaints and problems from a range of stakeholders and approving actions outside standard operational delivery.
4. Provide an enhanced customer service in accordance with agreed service levels and associated performance measures.

5. To ensure that relevant statutory obligations are met through checking service specific processes and systems to support the Finance Service to adhere to statutory requirements.
6. To ensure appropriate actions are taken to mitigate risk of service deliverables.
7. Supporting the Finance Service to implement continuous improvements by the development and identification of system improvements and processes for all services and deliver efficiencies, participating in projects as appropriate.

Support the organisation in an emergency response as required.

Please note: Annual targets will be discussed during the appraisal process.

Key Facts and Figures of the Post

- **Budget Responsibilities:** Manage agreed resources and financial transactions
- **Staff Management Responsibilities:** Manage the team performing transactional services including cash receipting and income management.
- **Other:** None

Essential Criteria

- **Qualifications:**
 - NVQ3 or 4 or equivalent experience or knowledge in the relevant work areas
- **Knowledge:**
 - Experience in a demanding role working with Microsoft office including Word, Excel, Outlook, PowerPoint, and SharePoint.
 - Knowledge of complex and diverse processes, procedures and systems within a financial support environment
- **Experience:**
 - Experience of managing and motivating staff and allocation of work with key performance indicators.
 - Experience in delivering excellent customer service to customers, both internal and external.
 - Experience of change management and change behaviours to improve the service for customers.
 - Experience of developing and monitoring service performance.
 - Adaptability to support internal customers across the Council.
- **Expertise:**
 - Experience in resource management allocation to staff across the service centre to meet the demands of the customer.
 - Experience of devising, implementing, monitoring and maintaining accurate financial and administration systems

Disclosure and Barring Service (DBS) Checks

- This post does not require a DBS check.

Job Working Circumstances

- **Emotional Demands:** N/A
- **Physical Demands:** N/A
- **Working Conditions:** N/A
- **Other Factors:** N/A

Other Factors:

- *Subject to service area being supported, DBS check may be required within the current guidelines.*