

# TRADED SERVICE

## FINANCIAL MANAGEMENT

2026-27

## ABOUT US

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At Shard Business Services, we are committed to delivering high-quality, value-driven support to the education sector. We take pride in providing specialist business services that are both effective and affordable ensuring that every client, regardless of size or budget, receives the support they need to operate with confidence and efficiency. With a sharp focus on efficiency, compliance, and growth, we partner with clients across sectors to streamline processes, enhance back-office performance, and drive sustainable results.

With over 25 years experience within the education sector, our extensive knowledge ranges across core disciplines essential to academy trust operations. This includes strategic financial management, benchmarking, resource planning, internal scrutiny, data protection, and business leadership support.

We understand that one size does not fit all. That's why our approach is tailored to the unique needs of each Trust or school we work with. We work collaboratively with leaders to develop forward-thinking solutions that support improvement, build capacity, and help you succeed not just today, but in the long term. Our blend of innovation, expertise, and client care positions us as a trusted partner to some of the most successful education providers in the sector.

At our core, we value integrity, responsiveness, and a personalised approach to client success. We don't just provide services we build partnerships that evolve with your needs.



Words cannot express enough thanks to Sheryl at Shard Business Services. Having met with several other providers, I knew from the first conversation with Sheryl that she was the perfect fit. She helped our Trust move to GAG pooling, completely rebuilt our budgets, coached our Finance Team, and supported the Trust and me personally as CEO during an interim period while we were appointing a CFOO. This comprised a significant change in financial approach, but most crucially was a key component of our cultural transformation. Sheryl thoroughly understood and embraced this, meeting with every academy Principal and SLT to explain changes and discuss any questions. The service we had was first class - personable, efficient, astute (adeptly understanding how best to support a CEO and Board), agile and perceptive. At the heart of Sheryl's work and experience is improving outcomes for students: the very reason we are all here. Quite simply, I would never go anywhere else.

**Chief Executive Officer**  
Authentic Education



Experts in compliance



Highly reputable



Working in partnership



Customer focussed



Affordably priced



Qualified & experienced

## OUR SERVICE

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Having strong financial management and controls is essential for every academy trust. It enables organisations to plan effectively, keep objectives on track, and demonstrate accountability in an open and transparent way. At Shard Business Services, we provide schools and academies with bespoke, high-quality financial advice, tailored to their individual needs. Our service is designed to give leaders, governors, and finance staff the expertise and confidence they need to manage budgets, resources, and compliance requirements with assurance.

Our financial management service offers a comprehensive yet flexible package of support. This includes the preparation of annual budgets, strategic budget planning, monthly management accounts, and recovery plans where required. We also provide practical advice and guidance on budget profiling, cash flow forecasting, income and expenditure analysis, and compliance with statutory regulations. By combining strategic oversight with hands-on support, we ensure that financial processes from DfE returns to school-level reporting are efficient, accurate, and aligned with your trust's long-term goals.

A key strength of our service is its ability to adapt to the unique needs of each organisation. Whether you are navigating complex funding arrangements, responding to financial pressures, or planning for growth, we work alongside your team to provide targeted advice and tailored solutions. Each engagement concludes with clear recommendations and practical tools to support improved financial control, transparency, and sustainability.

By aligning with best practice and regulatory expectations, our financial management support helps trusts maintain strong governance and build long-term resilience. We provide trustees and leaders with the assurance, insights, and practical strategies they need to make informed decisions, maximise resources, and deliver value for their school communities.

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We will forever be grateful to Sheryl for supporting us when we needed help the most. When faced with an unexpected financial challenge, she very swiftly provided guidance and support. With warmth, professionalism, and a deep understanding of the situation, she helped us find a path forward that ensured stability for our school. It wasn't just about numbers it was about genuine care for the school's future and the understanding about the lack of knowledge and skills the staff had in this area. Thanks to her expertise and kindness, we were able to navigate the uncertainty with confidence. I wholeheartedly recommend Sheryl to any school looking for a dedicated, compassionate, and knowledgeable financial advisor.

**Accounting Officer**  
Goldington Green Academy

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# OUR APPROACH

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Financial management is a critical function within academy trusts, underpinning not only compliance but also long-term sustainability and effective use of public funds. At Shard Business Services, we specialise in supporting schools and trusts with robust financial management, shaped by a deep understanding of the education sector's funding landscape, operational challenges, and regulatory requirements. We recognise that every organisation has its own financial pressures, priorities, and ambitions, so our approach is designed to align closely with the goals of each trust. This ensures that our support is not only compliant with statutory regulations but also genuinely impactful in driving financial stability and growth.

We pride ourselves on delivering a fully bespoke service, tailored to the financial needs of each organisation. Rather than applying a one-size-fits-all model, we work collaboratively with trust leaders and finance staff to identify the areas where guidance, capacity, or assurance are most needed. Where standard practices already exist, we adapt them to your context; where they do not, we develop tailored financial strategies, tools, and processes that reflect your trust's unique circumstances. Our flexible and responsive approach ensures that your financial management plans are built around your priorities, not ours.

What sets Shard Business Services apart is our commitment to sector expertise. Our team brings extensive experience in school and academy finance, compliance, and resource management areas that sit at the heart of effective financial stewardship. This cross-cutting knowledge allows us to provide advice and assurance that is rooted not only in regulation but also in the practical realities of managing budgets, forecasting, and reporting across the academy landscape. With Shard Business Services, you gain the support of professionals who understand the complexities of educational finance and can help your organisation manage resources with confidence, accountability, and vision.

## Our commitment to you

- Agree mutually convenient dates and time for support to be provided.
- Agree appropriate communication methods to support stakeholders.
- Work to agreed key deadlines for tasks require completing.
- Work with the organisation's agreed reporting parameters.
- Work to the agreed scope of works provided by the organisation.

## Your commitment to us

- Agree mutually convenient dates and time for support to be take place.
- Agree appropriate communication methods to support stakeholders.
- Determine and agree key deadlines for tasks require completing.
- Determine and agree key reporting mechanisms.
- Determine and agree a scope of works to be adhered to.

# SERVICE SCOPE

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The following services are offered under our Financial Management traded service offer:

## Financial Planning

- ✓ Provide financial forecasting with assumptions and notes
- ✓ Ensure financial profiling of budgets is accurate
- ✓ Provide advice and guidance on financial forecasting

## Recovery Plans

- ✓ Ensure financial recovery plans are accurate and fit for purpose
- ✓ Use key performance indicators to support recovery plans

## Management Accounts

- ✓ Income and expenditure analysis
- ✓ Budget analysis of actuals vs budgets
- ✓ Cashflow forecasting analysis
- ✓ Balance sheet and control accounts reconciliation

# SERVICE SCOPE

## Financial Health Check

- ✓ Key Performance Indications and comparators
- ✓ Financial sustainability
- ✓ Budget assumptions
- ✓ Sustainable staffing models
- ✓ Pupil number analysis

## Financial Support

- ✓ Onsite visits
- ✓ Telephone and email support
- ✓ Attendance at Trustee and Governor meetings
- ✓ Horizon and educational landscape scanning
- ✓ Financial due diligence



# ADDITIONAL SERVICES

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Shard Business Services provides expert, reliable, and bespoke support services tailored to the needs of schools, academies, and trusts. Our traded services are designed to strengthen operational effectiveness, ensure compliance, and provide strategic guidance across key business functions.

We work in partnership with your team to offer flexible, scalable services that align with your values and ambitions.

## Internal Scrutiny

### Offer:

- Provide independent assurance
- Ensure that public funds are used appropriately
- Fully bespoke service

### Benefits:

- Align fully with the requirements of ATH
- Independent oversight and assurance
- Expert sector knowledge

## Policy and Compliance Reviews

### Offer:

- Review and update of policies
- Bespoke policy drafting aligned to your procedures
- Policy tracker and review schedule setup

### Benefits:

- Up-to-date and legally compliant policies
- Reduced administrative burden
- Strategic alignment with your trust's goals

## Resource Management and Benchmarking

### Offer:

- Support with ICFP
- Analysis of workforce deployment and curriculum efficiency
- Benchmarking against national and local data sets

### Benefits:

- Strategic insight into staffing and resource use
- Identification of cost-saving opportunities
- Alignment of educational outcomes with financial efficiency

## GDPR and Data Protection

### Offer:

- External Data Protection Officer (DPO) service
- GDPR audits and compliance reviews
- Policy and documentation support

### Benefits:

- Assurance of regulatory compliance
- Reduced risk of data breaches
- Clear policies and protocols

## Project and Change Management

### Offer:

- Project planning and delivery support
- MAT growth/merger/due diligence
- Systems change, including finance or HR software transitions

### Benefits:

- Timely delivery of complex projects
- Independent oversight and assurance
- Reduced strain on internal resources

## Training and Development

### Offer:


- Training for senior leaders, governors, and staff
- Topics include financial governance, risk, GDPR
- Delivery online or in-person

### Benefits:

- Improved confidence and skills
- Staff and governor development
- Customised to your context

# CONTACT US

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