

TRADED SERVICE

INTERNAL SCRUTINY

2026-27

ABOUT US

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.

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Shard Business Services has facilitated openness and transparency from the outset. Reports produced, including recommendations, have supported real change to be implemented in achievable and meaningful ways.

This investment in time and scrutiny has been invaluable in our journey as we aspire for excellence in our financial, non-financial controls and risk management procedures. We would not hesitate to recommend Shard Business Services to your setting.

Director of Operations

The Sycamore Church of England Trust

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Experts in compliance



Highly reputable



Working in partnership



Customer focussed



Affordably priced



Qualified & experienced

OUR SERVICE

Within the education sector and particularly within academy trusts compliance, risk management, and accountability are essential to ensuring long-term success and public confidence. At Shard Business Services, we recognise the critical role that effective internal assurance plays in supporting strong governance and operational excellence across the academy landscape.

An Internal Scrutiny review is a core assurance requirement under the Academy Trust Handbook (ATH) 2026. Our service provides independent oversight of your trust's financial controls, governance processes, and risk management systems. The review is designed to ensure that public funds are used appropriately, operational activities (such as payroll, procurement, and budgeting) meet regulatory and ethical standards, and that potential risks are identified and mitigated early. Our reviews not only highlight areas for improvement but also offer practical, actionable recommendations to support Trustees and Audit Committees in strengthening oversight.

A key feature of our approach is that it is risk-based, as required by the ATH 2026. Rather than conducting broad or cyclical reviews, we focus scrutiny efforts on the most significant areas of risk such as financial pressures, rapid growth, or new system implementations. This ensures efficient use of resources and timely intervention where it matters most. Each review concludes with a comprehensive internal scrutiny report, which is provided to the trust's Audit Committee. Trusts are then expected to implement suitable actions in response to the recommendations, strengthening both governance and organisational resilience.

By aligning fully with the requirements of ATH 2026, our internal scrutiny service helps your trust maintain high standards of accountability, transparency, and continuous improvement. We provide trustees with clear, evidence-based insights that support sound decision-making and foster confidence among regulators, funders, and stakeholders. Through our expertise and sector knowledge, we help academy trusts operate responsibly and effectively in an increasingly complex and regulated environment.

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We are delighted with the service we have received from Shard Business Services since we began working with them. Sheryl is friendly and approachable and has a unique understanding of school business management and particularly financial compliance and accountability. The service was prompt and efficient and we have felt confident in the advice provided, which was delivered in a clear and understandable manner despite the complexities involved. We would have no hesitation in recommending Shard Business Services to any future potential clients

School Business Manager
Hawes side Academy

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OUR APPROACH

At Shard Business Services, we specialise exclusively in delivering internal scrutiny services to the academy sector, and our approach is shaped by a deep understanding of the sector's regulatory environment and evolving risk landscape. Recognising that every trust operates differently, we design our scope of work to align closely with the key risks and operational priorities regularly identified in academy trust risk registers. This ensures that our internal scrutiny programmes are both relevant and targeted, providing maximum value and assurance to audit and risk committees.

We pride ourselves on offering a fully bespoke service, tailored to the individual needs of each trust. Rather than applying a one size fits all model, we work collaboratively with our clients to identify the areas they wish to focus on.

Where standard workflows already exist, we adapt them to your context; where they don't, we develop customised workflows and testing procedures specifically designed to address your trust's unique risk profile and assurance needs. Our flexible and responsive approach means your internal scrutiny plan is built around your priorities not ours.

What sets Shard Business Services apart is our commitment to sector expertise. Our team comprises experienced personnel, with experience in a significant number of key areas, such as financial management, cyber security, GDPR, compliance and many more. Our in-depth knowledge of the Academy Trust Handbook ensures that our reviews are not only compliant but also rooted in a practical understanding of how academies operate on the ground. With Shard Business Services, you gain the benefit of working with professionals who truly understand the pressures, priorities, and compliance challenges that Trusts face today.

Our commitment to you

- Agree a mutually convenient date and time for internal scrutiny visits to take place.
- Provide a draft internal scrutiny report within two weeks of undertaking the review.
- Provide final internal scrutiny report within one week of receiving comments from the Trust.
- Attend one Trustees meeting where possible to present findings to Trustees.
- Provide annual internal scrutiny report by 31st August.

Your commitment to us

- Agree a mutually convenient date and time for internal scrutiny visits to take place.
- Provide sufficient information to undertake the internal scrutiny review.
- Provide sufficient access to systems where appropriate to undertake the review.
- Provide access to the organisations risk register
- Provide comment on draft internal scrutiny report within 2 weeks of receiving the draft report

SCOPE OF WORKS

To ensure clarity, alignment, and accountability, the scope of the internal scrutiny work will be clearly defined and agreed upon in advance. This scope must be formally approved by your board of Trustees prior to the commencement of any scrutiny activities. Once topics have been agreed we will provide a comprehensive Internal Scrutiny Programme of Works, outlining the focus areas, timing, and reporting expectations for the year ahead.

A list of topics is outlined below, however if you require something bespoke, please contact us for more information.

Business & Development

- ✓ Due Diligence
- ✓ Fixed Assets
- ✓ Strategic Plan & Growth

Governance

- ✓ Fraud, Theft & Anti-Bribery
- ✓ Conflict of Interest
- ✓ Pupil Premium
- ✓ Risk Management
- ✓ Business Continuity
- ✓ Census Returns
- ✓ GDPR
- ✓ Governance Handbook
- ✓ Statutory Policies

ICT & Cyber

- ✓ Cyber Security
- ✓ Filtering & Monitoring
- ✓ Technological Standards
- ✓ ICT Infrastructure
- ✓ ICT Systems and Controls
- ✓ Website

SCOPE OF WORKS

Budget and ICFP

- ✓ Financial Forecasting
- ✓ ICFP
- ✓ Resource Management

Finance

- ✓ Cash & Banking
- ✓ Income Management
- ✓ Procurement
- ✓ Monthly Closedown
- ✓ Financial Controls
- ✓ Financial Reporting
- ✓ Contract Management
- ✓ Capital Works
- ✓ Academy Trust Handbook

People & Pay

- ✓ HR
- ✓ Payroll
- ✓ Safer Recruitment
- ✓ Managing Attendance
- ✓ Safeguarding & SCR
- ✓ Succession Planning

Premises Management

- ✓ Health & Safety
- ✓ Good Estates Management
- ✓ Sustainability

ADDITIONAL SERVICES

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.

Business Leadership

Offer:

- Strategic leadership across business operations
- Interim or project-based School Business Leader support
- Budgeting, forecasting, and financial planning

Benefits:

- Continuity during leadership transitions
- Improved financial oversight and planning
- Capacity support during busy periods

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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