

Means-tested School Bursary Model Policy & Guidance

Document Owner	Head of Finance and Administration/Bursar
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Terminology Used in This Document

The word “children” will be used throughout this document and in using it no gender assignation is intended.

The word “parent” or “parents” will be used throughout this document. This should be taken to mean natural, adopted parents, careers or guardians.

Financial Assistance Framework

The Steering Committee of MMI is committed to broadening access to Montessori education at the school by offering means-tested financial support with school fees to eligible parents, aiming to assist as many children as possible who meet MMI's entry criteria, while ensuring responsible stewardship of the school's financial resources and long-term sustainability. Such support is known as a bursary. Bursaries may be awarded in the form of a discount of up to full fee remission in cases of proven need and may also include financial assistance for school lunches where appropriate, depending on the individual circumstances of the prospective child and each of his or her parents.

Bursary awards are subject to a regular review of the child's and his or her parent's financial circumstances, with fresh information being required about the child's parents' circumstances for every year during the second term, that their child attends the school. Bursary awards may be removed or varied upwards or downwards, depending on the child's and parents' financial circumstances.

Awards are made on the basis of the MMI's scale of awards which sets out award levels in relation to the child's and each parent's financial circumstances, as amended from time to time. The scale of awards is reviewed and revised annually by the school and is approved by the Steering Committee. Though awards are generally linked to this scale, they may be varied upwards or downwards depending on the child's and each parent's financial circumstances (e.g. their savings, investments and realisable assets as well as their income, the size of their family, any other persons dependent upon them and other factors).

Awards may also be varied upwards or downwards for compassionate or other pertinent reasons. Such reasons may relate to a child's attitude, attendance or behaviour. They may also arise where parents have failed to support the school or to comply with their obligations under the school's Terms and Conditions (for example, through late payment of fees), or in any other circumstances permitted under the terms of the award and the school's Terms and Conditions.

A bursary may be withdrawn in its entirety in accordance with the terms on which the award is made or the school's Terms and Conditions. Withdrawal may also occur where, in the opinion of the Head of School, the child's attendance, behaviour or conduct at MMI no longer merits the continuation of the award. The same applies where the behaviour or conduct of a parent gives rise to such concerns. Verbal or physical abuse by parents will not be tolerated

and includes, but is not limited to, raised voices, shouting, physical intimidation or threats. The school reserves the right to amend the way in which awards are assessed.

Requests for financial support fall into two categories in the following order of priority:

1. Existing Children

Where a change in the child's and/or parents' circumstances has resulted in difficulty in meeting fees and other educational expenses and may result in the child being withdrawn part way through a stage of their education:

- This may include temporary arrangements for disbursement of hardship funds when local or national economic conditions affect family income.

2. New Applicants

Where a place has been offered but parents are unable to afford full fees.

Funding for new applicants is rare and considered only in genuinely exceptional circumstances. This may include cases where a child is formally recommended by a recognised community organisation (i.e. church) or trusted referrer, based on verified evidence that the family is experiencing significant hardship and would otherwise be unable to access a Montessori education.

- Applications for new starters must be received by 30 June to be considered at the July Steering Committee meeting.

The Application Process

This applies to existing children at the school who are submitting new applications. For the renewal of existing bursaries, please refer to the section titled "Annual Review".

Bursaries may be made available to parents of children entering any level of MMI. (See the school's Admission's Policy for further information on the school's entry criteria). They are awarded at the discretion of the Steering Committee, and the Head of Finance and Administration is responsible for the management and coordination of the process.

- ✓ Step one – parents seeking a bursary for their child are both required to complete a Bursary Application Form which seeks to establish the identity and financial circumstances of the family and of each parent. In the event both parents are separated and/or divorced, financial information from both parents should still be provided, as should the financial information of any other adults in the same household of either of the parent. The form, which requests details of all income, savings and capital, may be found at Annex A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Head of Finance and

Administration no later than 1st May in any year for bursaries to start the following September.

Parents seeking a bursary for their child are both required to sign a declaration stating that the information they have provided is accurate and complete. If their application is successful, they will be required to inform the school of any changes in circumstance during the academic year. If any information provided in the application, or as part of the broader assessment process, is subsequently discovered to be false or misleading or incomplete, the school may withdraw any award which has been made with immediate effect and following an investigation may require reimbursement. The school may also terminate its parent contract (Terms and Conditions) and require the removal of the child in such circumstances.

- ✓ Step two - the Head of Finance and Administration or their nominee assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend the school. Parents may also be asked to meet the Head of Finance and Administration or their nominee at the school and/or provide additional supporting information as may be requested.
- ✓ Step three - the Head of Finance and Administration or their nominee prepares a recommendation in accordance with the school's confidential scale of awards which is considered with the Executive Director and a joint recommendation is then reached.
- ✓ Step four - the joint recommendation is presented to the Steering Committee for approval. The Steering Committee may request further information to inform their deliberations.
- ✓ Step five - end of May the parents are advised whether their child is to be offered a place at the school and of the bursary offer.
- ✓ Step six – both parents are then required to sign a letter accepting the place at the school and an acknowledgement agreeing to any additional terms and conditions relating to the bursary.

MMI may use an external organisation to assist with processing bursary applications, including credit checks. Information provided by applicants may be made available, in confidence, to that organisation for those purposes.

All personal data processed in connection with the school's arrangements for bursaries shall be processed in accordance with the school's data protection policy.

The Case for Assistance

The Head of Finance and Administration will consider a number of factors when making the judgement as to the justification for support and the extent of such support; inevitably this is a holistic judgment. In the main, the child's suitability for the school is the first consideration in granting support.

- ✓ Suitability - Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the school's educational provision. Each child to whom support is offered must, in the opinion of the Head of School, be likely to make good progress following admission and possess the potential to develop themselves within the Montessori approach and benefit from participation in the full range of activities on offer at the school. A letter from a child's previous school will be requested when applicable.
- ✓ Financial limitations - the amount of the bursary award is not influenced by the child's capacities but by the extent of need. Each case is assessed on its own merits and awards are made subject to the school's ability to fund these within the context of its overall budget. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the school has a duty to ensure that all bursaries are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include (but are not limited to):
 - The ability to improve the financial position or earning power of each parent. For example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents, or the requirements of their partner's work.
 - Opportunities to release any capital. Significant capital savings and investments would be expected to be used for the payment of school fees, as would equity values in property assets.
 - In cases of parents who are divorced or separated, the contribution that is being made or could be made by both parents, regardless of who the child lives with, and based on the principle that liability for the fees is joint and several. This means that the school may consider the financial circumstances of each parent separately and together, treating each parent's household separately.
 - Contribution to household costs including school fees by other family members, any adults unrelated to the child or by third parties / outside sources.
 - The school considers that the following would not be consistent with the receipt of a bursary. It should be noted that the list is not comprehensive:
 - frequent or expensive holidays
 - new or luxury cars
 - investment in significant home improvements
 - a second property/land holdings
 - failure to honour school fee payments due.

- Acknowledging that others might have a different view, the school recognises that further factors should be considered as part of the overall holistic judgement in the bursary decision. These include:
- Where a child has siblings at the school (though a bursary award to one child does not guarantee an award to a sibling).
- Where the social needs of the child are relevant (for example, where a child's intellectual potential would be significantly enhanced by fostering positive peer relationships and access to a supportive educational environment).
- Where a parent is critically or terminally ill or is unable to secure permanent employment due to poor health or incapacity.
- Where a child is looked-after, adopted, or placed with foster carers, and where financial assistance would help ensure continuity of care, stability, and access to an educational environment that supports their wellbeing and long-term development.
- Where a parental situation has resulted in or is likely to result in the child having to be withdrawn from the school, the financial circumstances of both parents will be considered.

Existing Children - Change in Family Circumstances

Within overall budget funding, the school will in normal circumstances set aside each year a hardship fund, for cases of sudden, unforeseen need or where applications meriting bursary assistance are received out of the normal calendar cycle for bursaries. This sum will be set within budgetary constraints. Parents with a child at the school whose financial circumstances suddenly change may apply for a hardship award to the Head of Finance and Administration, explaining their situation and using the form at Annex A. **Such awards are subject to the availability of funding and cannot be guaranteed.**

If parents continue to require financial support in subsequent years, they will be required to submit repeat means-testing forms in the same way as other bursary holders.

Annual Review

All bursary awards are subject to repeat consideration of the child's and each parent's financial circumstances each term and may be varied upwards or downwards depending on the outcome of any review. Current bursary holders will be issued with repeat means-testing forms in February, for return within one working week of receipt. Bursary holders will usually be advised of the outcome of the Steering Committee review within three working days following the March meeting.

For families previously receiving bursary support, the Head of Finance and Administration has the discretion to recommend a reduction or withdrawal of the award to the Steering Committee. This discretion may be exercised where a child's attitude, attendance, or behaviour has been unsatisfactory. It may also be applied where parents have failed to support the school. Examples include late payment of their fees or failure to comply with the specific terms of the bursary award.

Confidentiality

The school respects the confidentiality of bursary awards made to children. Equally, the school expects recipients and prospective recipients to also maintain complete confidentiality about their bursary award.

Other Sources of Bursary Assistance

In addition to the school's bursary fund, families may also be eligible for support with the cost of school lunches. MMI encourages parents to apply for support where it is felt a good case can be made for assistance. Further information on how to pursue such assistance may be obtained from finance@mariamontessori.org.

Appendix A. Financial Assistance Request Form – School fees