



**MALTMAN'S GREEN**  
SCHOOL

# Public Benefit Policy

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**This policy also applies to the EYFS**

<b>Updated</b>	<b>Reviewed By</b>	<b>Review Date</b>	<b>Version</b>
November 2024	R Simmons	October 2027	2024.02

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Registered in England Company No. 897432. Registered Charity No. 310633



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## 1 Introduction

- 1.1 This Public Benefit Policy (“Policy”) has been prepared by the trustees (the “Governors”) of Maltman’s Green School Trust Limited (the “Charity”).
- 1.2 It contains both:
  - 1.2.1 a strategy as to the Charity’s objectives in the context of public benefit in the longer term (the “Strategy”); and
  - 1.2.2 an agreed policy for the Governors to follow in the financial year 2023-2024 to ensure compliance with the public benefit requirements in furtherance of the Strategy.
- 1.3 The key elements of the Strategy are set out in section 4 below. Further detail as to the actions the Charity will take on an annual basis in furtherance of the Strategy are set out in Section 5 (Bursaries); Section 5.4.3 (Other opportunities to benefit); and Section 8 (Funding Public Benefit activities).
- 1.4 This Policy should be read in conjunction with the School’s Bursary Policy.
- 1.5 This Policy will be reviewed annually by the Governors.
- 1.6 Each new Governor will be provided with a copy of this Policy and the Charity Commission’s guidance on public benefit.

## 2 Maltman’s Green School Trust Limited

### 2.1 Objects and Activities

- 2.1.1 The objects for which the Charity is established (the “Objects”) are, in accordance with the Memorandum and Articles of Association, to acquire, carry on and develop Maltman’s Green School and the curtilage, within which it is situated, and to acquire and carry on in the United Kingdom any school for the education of children.
- 2.1.2 In furtherance of the Objects, the Charity’s main activity is operating an independent school for girls aged 2 to 11 (the “School”).

## 3 Public Benefit Requirements

- 3.1 The Governors must be familiar with the longstanding principle that charities must exist for the benefit of the public and have a long tradition of providing public benefit, both through educating pupils at the School and through associated activities for the benefit of the wider community. They must follow developments in this area, resulting from the Charities Act 2022 and publication by the Charity Commission of guidance relating to public benefit.

- 3.2 The Governors must have regard to the guidance on public benefit published by the Charity Commission and report annually to the Charity Commission on the public benefit the Charity provides.
- 3.3 In particular, the Governors must be mindful of the following key principles which can be drawn from the Charity Commission's guidance:
- 3.3.1 the public benefit a charity provides must be related to its objects; and
  - 3.3.2 a fee charging independent school must demonstrate that there is sufficient opportunity to benefit from its educational services and facilities for those who cannot afford the fees, including those in poverty.
- 3.4 In view of the above principles, the Governors will focus on the following key areas in which the Charity can provide public benefit:
- 3.4.1 provide the opportunity for pupils to be educated at the School;
  - 3.4.2 providing swimming and other Physical Education facilities to children attending other schools;
  - 3.4.3 provide opportunities for children attending maintained schools;
  - 3.4.4 provide professional support to the education sector; and
  - 3.4.5 create social awareness education by supporting local, national, and international charities.

## 4 Public Benefit Strategy

### 4.1 The Governors have agreed the Strategy in order to:

- 4.1.1 widen pupil access to the School and ensure that children who could not otherwise attend the School can benefit from the education it provides to its pupils;
- 4.1.2 continue the Charity's tradition of providing public benefit; and
- 4.1.3 meet the Charity Commission's public benefit requirements applicable from time to time.

### 4.2 The key elements of the Charity's Strategy are as follows:

#### 4.2.1 Bursaries

- (a) The Charity will continue to provide means-tested bursaries to the parents of pupils who would otherwise not be able to afford the School's fees;
- (b) The value of bursaries will be up to 100% of full fees;
- (c) Additional assistance will also be made available to parents to assist with associated costs of their child's education;

- (d) The proportion of the Charity's income which will be allocated to fund means-tested bursaries will be determined by the Governors in respect of each financial year.

#### **4.2.2 Other Public Benefit Activities**

- (a) The Charity is committed to continuing and expanding the activities it currently carries out to benefit children other than pupils at the School;
- (b) All such activities the Charity carries on must relate to the Charity's Objects;
- (c) The focus shall be on those activities which will provide the most public benefit for minimum opportunity cost.

#### **4.2.3 Funding Public Benefit provision**

- (a) The cost of the Charity's public benefit provision will be met in accordance with the budget in respect of each financial year (the "Budget") determined by the Governors on an annual basis as part of the process of reviewing this Policy.
- (b) The Budget will identify the total amount or proportion of the Charity's total income in any financial year (and which of the Charity's sources of income) which will be used to fund its public benefit provision.

## 5 Other forms of fee-assistance

In addition to fee-assistance provided under the Bursary Scheme, the Charity provides other forms of fee-assistance including staff discount on fees.

## 6 Other Opportunities to Benefit

In addition to giving assistance with fees, the Charity provides other opportunities for the public to benefit, including the hire of facilities and sharing of expertise which are reported in the School's Annual Return.

## 7 Funding Public Benefit Activities

The School has a Bursary Fund and invites current parents to make a donation with payment of their termly fee account. This fund is used to provide bursary awards to the parents of new pupils. This is supplemented in the School's Budget with funds allocated for bursaries and financial support.

## 8 Charity Commission Guidance

- 8.1 The Governors acknowledge that they are legally required to take the Commission's guidance on public benefit into account in relation to all their decision making (and must confirm they have done so in their annual report – see further below);

- 8.2 Public benefit shall be a standing agenda item at each meeting of the Governors, and the minutes of the meeting shall record such considerations (see further below);
- 8.3 In particular, whenever proposals are considered which would involve significant investment or expenditure, e.g. in relation to a capital project, the Governors shall consider whether the proposal is likely to have any impact on the Charity's ability to meet the public benefit requirement.

## 9 Recording, reporting and accounting

- 9.1 The Governors recognise the importance not only of *providing* opportunities to benefit, but also of being able to *demonstrate* the public benefit the Charity provides. The Governors also recognise the need to prepare for the possibility that the Charity could be selected for a public benefit assessment by the Commission.
- 9.2 To this end, the Governors will ensure that:
- 9.2.1 the minutes of each governing body meeting (and, where relevant, committee meeting) record in detail the consideration given to public benefit and any impact on the outcome of discussions caused by considering public benefit;
- 9.2.2 a "public benefit register" is maintained, which records all the ways in which the Charity provides public benefit (and other relevant information) including:
- (a) the number and type of bursaries provided each year;
  - (b) any additional assistance to help parents meet the non-fee costs of their child's attendance at the School;
  - (c) the use of the School's facilities by children other than the School's pupils; and
  - (d) the methods used to advertise the Bursary Scheme and other opportunities to benefit.
- 9.3 The Governors will include the following in their annual report:
- 9.3.1 a statement by the Governors confirming that due regard has been paid to the public benefit guidance published by the Charity Commission; and
- 9.3.2 a report of those activities undertaken by the Charity to further its charitable purposes for the public benefit.
- 9.4 The Governors are also familiar with the Commission's example annual report for a fee charging independent school and the statements made in that report which demonstrate that the principles of public benefit in the Commission's guidance have been met.

- 9.5 Appendix 1 contains a summary of the provisions the Governors will ensure are included in each annual report to demonstrate to the Commission that the Charity has complied with its obligations in respect of public benefit.
- 9.6 The Board of Governors as a whole is responsible for ensuring that the Charity complies with its obligations in relation to public benefit. However, the Public Benefit and Bursaries Sub-Committee will oversee the Charity's public benefit efforts and report to the Board on a regular basis.

## 10 Appendix 1: Governors' Annual Report

The following schedule sets out a summary of the statements which should be included in the Annual Report to demonstrate public benefit. The Governors should refer to the Commission's example report for further details.

Section of Report	Statement	Legal requirement/principle demonstrated
Objects/ Objectives/ Aims	Statement by the Governors that in setting the objectives and planning the activities of the School, due regard has been paid to the Commission's general guidance on public benefit and in particular its supplementary public benefit guidance on advancing education and fee-charging.	Legal requirement
	Statement as to what the objects of the Charity are.	Principle 1b
	Statement as to who the Charity's beneficiaries are.	Principle 2a
Ethos/ Strategy/ Policy	Statement that School welcomes pupils from all backgrounds.	Principles 2b and 2c
	Explanation of the admission criteria and admissions policy.	Principles 2b and 2c
	Explanation of the access policy including bursary policy and other fee assistance provided.	Principle 2b
Review of activities and achievements	Report of those activities undertaken by the Charity to further its charitable purposes for the public benefit. In particular, this report should address: <ul style="list-style-type: none"> <li>the educational activities of the Charity, focusing on those which have made a significant contribution to the Charity's objects and provide public benefit;</li> <li>academic, sporting and co-curricular activities (e.g. music and drama);</li> <li>details of bursaries and scholarship awards;</li> <li>details of other "public benefit" activities; and</li> <li>details of any community service undertaken by pupils.</li> </ul>	Legal requirement
	Explanation of how bursary policy worked in practice.	Principles 2b and 2c
	Value of means tested bursaries and cost of other public benefit activities.	Value of opportunities provided
Structure, Governance and Management	Statement confirming that the Governors received no private benefit from the Charity and in particular that no Governor or person connected with a Governor received any benefits from means tested bursaries awarded to pupils.	Any private benefit is incidental.