

# MONTESSORI EDUCATION FOR AUTISM

England & Wales · Charity number 1136552

## Details

---

**Status** Registered

**Legal form** Other

**Registered** 2010-06-23

**Register** [View on the Charity Commission register](#)

## Contact

---

**Address** Montessori House  
135 Westcombe Hill  
Blackheath  
London  
SE3 7DP

**Phone** 02083052202

**Email** [mail@montessorieducationforautism.com](mailto:mail@montessorieducationforautism.com)

**Website** [montessorieducationforautism.com](http://montessorieducationforautism.com)

## Activities

---

**Objects:** 3.1 TO ADVANCE EDUCATION OF CHILDREN WITH AUTISM (AND CONDITIONS RELATED TO AUTISM) THROUGH METHODS OF LEARNING AND EDUCATION DEVELOPED BY MARIA MONTESSORI

**Activities:** We advance the education of children with autism and conditions related to autism through methods of learning and education developed by Dr maria Montessori. We run regular sessions for Parents and babies, toddlers and children. We provide Professional SEN training, consultancy services, a HelpLine and publish material with special emphasis on Special Needs.

## Classification

---

- **How:** Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** Education/training, Disability
- **Who:** Children/young People, People With Disabilities

## Geography

- **Area of benefit:** UNDEFINED. IN PRACTICE, NATIONAL AND OVERSEAS
- Throughout England And Wales

## Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£73,585	£78,734	-	-
2023-12-31	£97,294	£108,029	-	-
2022-12-31	£101,373	£106,512	-	-
2021-12-31	£105,484	£100,924	-	-
2020-12-31	£115,847	£104,360	-	-

## Trustees

Name	Role	Appointed
ASHOK ARUMUGAM KUMAR		2011-10-06
DELPHINE MARCILLAUD		2015-09-18
David Owen Stott		2014-01-15
Katalin Lovassy		2020-07-01
Nickolas Tedstone		2023-01-21
RACHEL SPOONER		2011-10-12
ROGER OLIVER PATENALL		
SHALINI MODI		
Wendy Barbara Fidler		2009-02-28

**MONTESORI EDUCATION FOR AUTISM**

England & Wales - Charity number 1136552

---

# Accounts

---

Charity Number 1136552

---

## **Montessori Education for Autism**

---

Report of the Trustees  
and  
Independently Examined Financial Statements  
for the year ended 31 December 2024

---

## Montessori Education for Autism

---

### Contents

---

	Page
Trustees of the Charity	1
Reference and administrative details of the charity	1
Statement of Financial Activities	2
Balance Sheet	3
Notes to the Financial Statements	4 - 5
Accounting Policies	6
Report of the Independent Examiner	7
Report of the trustees	8 - 12
Testimonials	13

---

**Montessori Education for Autism**

---

**Trustees of the Charity**

---

Wendy Fidler	**	<i>Chair, Academic Director</i>
Roger Patenall	**	<i>Treasurer</i>
Shalini Modi	**	
Katalin Lovassy		
Ashok Kumar		
Rachel Spooner		
David Stott		
Delphine Marcillaud		
Nick Tedstone		

\*\* *Members of the Executive Committee*

---

**Reference and administrative details of the charity**

---

Charity Registered Number 1136552

**Registered Office**

Montessori House, 135 Westcombe Hill, Blackheath, London, SE3 7DP

**Bankers**

CAF Bank Ltd

**Insurance Brokers**

Northern Counties Insurance LLP

Third Sector Protect

---

**Montessori Education for Autism**

---

**Statement of Financial Activities**for the year ended 31 December 2024

---

		<b>Restricted Funds 2024</b>	<b>Unrestricted Funds 2024</b>	<b>Total Funds 2024</b>	<i>Total funds 2023</i>
	Note	£	£	£	£
<b>Incoming resources</b>					
Voluntary income	1		57,596	57,596	75,366
Activities	2		15,787	15,787	21,632
Investment Income	3		202	202	296
<b>Total Incoming Resources</b>		<u>0</u>	<u>73,585</u>	<u>73,585</u>	<u>97,294</u>
<b>Resources Expended</b>					
Charitable activities	4		78,234	78,234	107,429
Governance costs	5		500	500	600
<b>Total resources expended</b>		<u>0</u>	<u>78,734</u>	<u>78,734</u>	<u>108,029</u>
<b>Movement in total funds for the year</b>		0	(5,149)	(5,149)	
Total funds at 1 January 2024		0	18,838	18,838	
<b>Total funds at 31 December 2024</b>		<u>0</u>	<u>13,689</u>	<u>13,689</u>	

---

**Montessori Education for Autism**

---

**Balance Sheet**as at 31 December 2024

---

	Note	2024	2023
		£	£
<b>Current Assets</b>			
Petty Cash Floats		387	372
Debtors	7	2,750	3,481
Total at Bank		10,532	15,696
		<hr/>	<hr/>
		13,669	19,549
<b>Creditors</b>			
Due within one year	8	-	731
		<hr/>	<hr/>
		13,669	18,818
		<hr/>	<hr/>
		<b>13,669</b>	<b>18,818</b>
		<hr/>	<hr/>
<b>Charity Funds</b>			
Unrestricted Funds	9	13,669	18,818
Restricted Funds	9	-	-
		<hr/>	<hr/>
		<b>13,669</b>	<b>18,818</b>
		<hr/>	<hr/>

The notes and policies on pages 4 to 6 form part of these Financial Statements

The Financial Statements were approved by the Trustees on April 11th, 2025  
and signed on their behalf by:



Roger Patenall FCA

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements**

for the year ended 31 December 2024

---

	<b>Restricted Funds 2024 £</b>	<b>Unrestricted Funds 2024 £</b>	<b>Total Funds 2024 £</b>	<i>Total Funds 2023 £</i>
<b>1 Voluntary Income</b>				
Donations		43,478	43,478	57,870
Gift Aid		14,048	14,048	17,496
	<u>-</u>	<u>57,526</u>	<u>57,526</u>	<u>75,366</u>
<b>2 Income from Activities</b>				
Registrations	-	180	180	420
Donations to Nurture Groups	-	14,633	14,633	18,760
Donations for SEN & Waldon Training	-	450	450	1,760
Other fundraising	-	594	594	692
	<u>-</u>	<u>15,857</u>	<u>15,857</u>	<u>21,632</u>
<b>3 Investment Income</b>				
Bank Interest		202	202	296
		<u>202</u>	<u>202</u>	<u>296</u>
<b>4 Expenditure on Charitable Activity</b>				
Summary by Fund Type:				
General Overheads		1,810	1,810	1,862
Administration costs		8,165	8,165	6,314
Nurture Groups		63,008	63,008	91,943
Training		5,425	5,425	7,285
MEfA Fundraising Events		326	326	645
	<u>-</u>	<u>78,734</u>	<u>78,734</u>	<u>108,049</u>
Summary by expenditure type:				
Overheads and Admin		9,975	9,975	8,176
Nurture Groups		63,008	63,008	91,943
Training		5,425	5,425	7,285
MEfA Conference & Events		326	326	645
		<u>78,734</u>	<u>78,734</u>	<u>108,049</u>

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements, continued**

---

	<b>2024</b>	<b>2023</b>		
	<b>£</b>	<b>£</b>		
<b>5 Employee</b>				
In 2023 there were no employees (2023 - one) involved in the provision of charitable activity				
There were no employees whose annual remuneration was £60,000 or more.				
<b>6 Governance Costs</b>				
Accountancy Costs	500	600		
		-		
		-		
	<u>500</u>	<u>600</u>		
<b>7 Net Income</b>				
This is stated after charging Accountancy Fees £500 (2023 - £600)				
During the year, no Trustee received any remuneration for acting as a Trustee (2023 - nil)				
During the year, no Trustee received any benefits in kind (2023- nil)				
During the year, no Trustee received any reimbursement of expenses (20223 - nil)				
<b>8 Debtors</b>				
Prepayments	-	731		
Donation Pledged	-			
Sundry Debtors	2,750	2,750		
<b>9 Creditors</b>				
Expenses to be settled within one year	-			
<b>## Statement of funds</b>	Brought Forward	Incoming Resources	Resources Expended	Carried Forward
	£	£	£	£
Unrestricted funds	18,818	73,585	78,734	13,669
Restricted funds	0			0
	<u>18,818</u>	<u>73,585</u>	<u>78,734</u>	<u>13,669</u>

**1. Basis of preparation of the Financial Statements**

The Financial Statements have been prepared using the historical cost convention and in accordance with the Financial Reporting Standard for Smaller Entities. The Financial Statements have been prepared in accordance with the Statement of Recommended Practice - "Accounting and Reporting by Charities" and with applicable accounting standards.

The books of account are kept on a Receipts and Payments basis in accordance with Charity Commission advice for a charity of this size. The Financial Statements have been prepared making adjustments to reflect timing differences between the receipt and payment of monies and the year in which the activity takes place.

Payments of deposits to landlords in respect of rent obligations have been carried forward as debtors.

**2. Fund Accounting**

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for specific purposes.

Restricted funds are funds which are to be used in accordance with the specific restrictions imposed by donors and which have been raised by the charity for particular purposes.

**3. Incoming Resources**

All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with accuracy.

Gifts in Kind donated to the charity are included at valuation (subject to de minimis) and recognised as income at the time of receipt.

No amounts are included in the Financial Statements for services donated by volunteers. Donated services or facilities are included in income (subject to de minimis) at a valuation which is an estimate of the financial cost borne by the donor where such cost is quantifiable and measureable.

Income Tax recoverable in relation to donations received under Gift Aid is recognised at the time funds are received from HMRC.

**4 Resource expended**

All expenditure is accounted for at the time the funds are expended, except where detailed in note 1 above. Where costs cannot be directly attributed to one particular activity they have been allocated, so far as is practicable, on a basis consistent with the use of the resources.

Governance costs are those incurred in connection with the administration of the charity and in compliance with constitutional and statutory requirements.

**Report of the Independent Examiner to the trustees of Montessori Education for Autism for the year ended 31 December 2023.**

---

**Respective Responsibilities of the trustees and of the Examiner.**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required under section 144 of the Charities Act 2011 (the Act) and that an independent examination is needed.

It is my responsibility to:

- (1) examine the accounts under section 145 of the Act;
- (2) follow the procedures laid down in the General Directions given by the Charity Commission (under section 145(5)(b) of the Act), and
- (3) state whether particular matters have come to my attention.

**Basis of Independent Examiner's statement.**

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

**Independent Examiner's statement.**

In connection with my examination, no matter has come to my attention which gives me reasonable cause to believe that, in any material respect, the requirements to:

keep accounting records in accordance with section 130 of the Act and to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Act, have not been met, and furthermore, there are no matters to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Richard W Carey  
London.

24<sup>th</sup> April, 2024

## **Report of the Trustees for the year ended 31 December 2024**

---

The trustees present their Annual Report together with the Financial Statements of Montessori Education for Autism (“the charity” also “MEfA”) for the year ended 31 December 2024. The trustees confirm that the Annual Report and Financial Statements of the charity comply with current statutory requirements, the requirements of the charity’s governing document and the provisions of the Statement of Recommended Practice (SORP) Accounting and Reporting by Charities.

### **Objectives and Activities.**

The principal objectives of the charity, as defined by the Constitution, are:

- 1) to advance education of children with autism (and conditions related to autism) through methods of learning and education developed by Dr Maria Montessori and in connection with this:
- 2) to provide advice and support to families and carers of children with autism.
- 3) to provide information, advisory and advocacy services, training, day services, education, leisure and recreation for children with autism and to support others making similar provision.
- 4) to promote, conduct and engage in research into autism, and to publish the useful results of such research.
- 5) to collect and disseminate information relating to autism and to exchange such information with other bodies having similar objects.

The principal activities of the charity, are to:

- 1) provide classes during term time aimed at all children, but principally those with special education needs.
- 2) provide post-graduate training to professionals and others with interest in the development of children and the principles of Montessori Education
- 3) provide input to conferences and workshops, both those organized by the charity and by third parties.
- 4) provide support to families and schools by means of telephone and email helplines, and by personal meetings and presentations.

### **Public Benefit and delivering Social Value**

This year, again, all of our activities have provided immediate and visible benefit to those with special needs (principally autism related), their families and their carers. MEfA aims to keep its objects under review and to continue directing its energies to those who may benefit from the expertise of its people

**Structure, governance and management:**

**Organisational structure and decision making:**

Trustees

All trustees give their time voluntarily and received no benefits from the charity in their role as trustees.

The trustees consider that the Board of Trustees provides a wide spectrum of experience to MEfA. This experience covers autism, special needs education, the principles of learning devised by Dr Maria Montessori and others and also provides an insight into care and education in countries other than the United Kingdom.

Risk Management

The trustees are aware of their obligations and the need to provide a safe, healthy environment in which staff, volunteers, visitors and clients and their families can have confidence.

Policies are in place, and are reviewed on a regular basis, covering, inter alia, Protection of Children and Vulnerable People; Health and Safety, Use of Cameras and Mobile Recording Devices, Data Protection and Staff, Trustee and Visitor protocols, which include induction into the ethics, standards and procedures of MEfA.

**Achievements and Performance:**

Activity Report

All our child and parent activities, and assessments, are held at Montessori House. These groups continue their evolution from an Early Intervention Class for very small children and their parents with a strong focus on developing children's social, sensory, communication, language and coordination skills. Our flagship project, the Montessori Moles after-school nurture group for children ages 4-12 years, is often operating at capacity, helping children who are struggling to access their education at primary school because of difficulties associated with autism, such as sensory issues, social, communication and physical difficulties, anxiety, low self-esteem and poor self-regulation which often leads to behavioural problems.

We now have the following groups running each week during term time:

- Baby Montessori (children aged up to 18 months);
- Toddler Montessori (children aged from 15–36 months);
- Montessori Inclusive School (children aged from 2-12 years: 5 weekly groups);
- Montessori Moles: After-School Nurture Group (aged 4-12 years);
- Forest School / Wellbeing Sessions (two weekly groups for all ages);

We are hugely indebted to the teachers, volunteers and interns who have supported our activities again this year; we have a continuing stream of interest and enquiries about this aspect of our work. We are grateful also to the young people from overseas who spend time with us in spite of the procedure of obtaining the necessary visas.

By 31 December 2024 we had completed 24 cohorts of the MEfA Montessori post-graduate SEN CPD Short Course: Part 1 - A Blueprint for Observation, and as a result we have trained teachers, psychologists, social workers, early years educators, parents, a choreographer, an environmental designer, and other masters-grade students so they can apply Montessori special education methodology and philosophy to their work, thus providing other avenues for reaching out to children and adults with autism. We are also justifiably proud of our increasing professional links with mainstream organisations.

In 2024 the number of children registered to our various sessions at Montessori House remained below the level pre-pandemic. This was expected and our budgets were reduced accordingly. Building up to our pre-pandemic level of activity is taking time, This aim has been further set back with the introduction by the local authority of areas of 'Low Traffic Networks', resulting in significant road closures at the start and end of each school day. For many families public transport does not provide a viable means of reaching MEfA, and have sadly ceased to attend. We are starting 2025 with moderate activity in all classes.

### **Financial matters**

#### Funding

The total income of MEfA for 2024 was £73,585 (2023 - £97,294). Expenditure amounted to £78,734 (£108,029 in 2023). General overheads in 2024 amounted to £1,810 (2023 - £1,862). Every item of expenditure has been scrutinised and the reduction in overhead reflects this. The trustees believe that this level of overhead is acceptable for a charity of this size and includes: Subscriptions made, Insurance, Fundraising, Bank and credit card charges and Professional Fees.

These financial results reflect the ongoing challenging fundraising climate faced by MEfA in 2024, but also demonstrate the responsive manner in which the trustees have been able to match much of the expenditure to the income available. In line with many organisations in similar sectors, it is proving challenging to match our existing financial model to the increases in energy and utility costs. The trading loss of £10,700 in the accounts is accounted for by both a shortfall in parent donations for classes and increases in utility costs.

The trustees attach great importance and commensurate effort into raising as much of our financial needs from the activities run on a regular basis, and thereby minimise our dependence upon grants from outside donors. This policy will continue during 2025 and we expect the coming year to be equally challenging. Nevertheless, MEfA is extremely grateful to the donors listed below, and acknowledges that such donations will continue to be a vital part of our funding programme.

---

## Montessori Education for Autism

---

### Donations

During 2024 grants, donations (including donations in kind) and funds were received from the following:

The Stephen Taylor Foundation  
The Bimal Family  
The Souter Charitable Trust  
The Page Family  
The Elder Family  
The Arthur Family  
Design for Print  
Shalini Modi  
Babs Oduwale  
Paola Torrani

MEfA is grateful to all donors, including many whose time has been freely given but are not acknowledged above.

### Expenditure

As noted elsewhere, trustees are not reimbursed in respect of their activities as trustees and no expenses have been reimbursed to trustees during the year.

In accordance with Charity Commission guidelines the accounts have been kept using the receipts and payments method. In the Financial Statements, Deposit rents paid to agents of the landlord in respect of the properties at 135 and 135A Westcombe Hill are carried forward as prepayments. Payment of insurance premia for 2025 has been made in December 2024 on behalf of the charity. The charge is carried forward as a prepayment whilst a creditor is carried forward for reimbursement of the payment to the insurer. Deposits received in advance of future year programmes are carried forward as creditors.

As anticipated 12 months ago, our energy costs increased year on year by about 75%. The next renewal is due in September this year, and some easing of costs is anticipated, with gas prices expected to decrease by about 20%. On the other hand we are seeing an increase in water costs in the region of 150%, turning a relatively insignificant expense into a large expense for which there is no competitive supplier.

### Reserves

The trustees are aware that the level of reserves is below an ideal level. All leaseholds are subject to three month notice of cancellation periods and the landlord holds deposits against much of this liability. Other than these leases the charity has no liabilities.

### **Investment Review**

MEfA funds not immediately required are held on a bank deposit account. Investment returns have, for some years, been negligible. However, 2024 generated modest income although the trend so far in 2025 is for interest rates to fall. The trustees consider that any extra returns that may be earned by seeking other uses for funds are outweighed by the inherent risks in taking such action

### **Plans for the future and appreciation**

At the time of preparation of this report, the outlook for 2024 remains very unclear, in spite of the success of the Covid vaccines programme there still remains the possibility of future infection.

Our Forest School continues to be developed and is evolving with an eye to the future. Elsewhere our plans are all focussed on preparation of the environment and, in particular, staff training, to ensure that we are well prepared should numbers of children attending MEfA recover.

We are confident that, whatever challenges are encountered, we will continue to offer as full a range as possible of activities through 2024. MEfA, in turn, could not operate without the continuing efforts of our staff, volunteers, donors and families for which we place on record our heartfelt thanks.

This report was approved by the Trustees on 28<sup>th</sup> April 2024 and signed on their behalf by:



Wendy Fidler

**MONTESORI EDUCATION FOR AUTISM**

England & Wales - Charity number 1136552

---

# Accounts

---

Charity Number 1136552

---

## **Montessori Education for Autism**

---

Report of the Trustees  
and  
Independently Examined Financial Statements  
for the year ended 31 December 2023

---

**Montessori Education for Autism**

---

**Contents**

---

	Page
Trustees of the Charity	1
Reference and administrative details of the charity	1
Statement of Financial Activities	2
Balance Sheet	3
Notes to the Financial Statements	4 - 5
Accounting Policies	6
Report of the Independent Examiner	7
Report of the Trustees	8 - 12
Testimonials	13

---

**Montessori Education for Autism**

---

**Trustees of the Charity**

---

Wendy Fidler	**	<i>Chair, Academic Director</i>
Roger Patenall	**	<i>Treasurer</i>
Shalini Modi	**	
Katalin Lovassy		
Ashok Kumar		
Rachel Spooner		
David Stott		
Delphine Marcillaud		
Nick Tedstone		<i>Appointed April 28th 2023</i>

\*\* *Members of the Executive Committee*

---

**Reference and administrative details of the charity**

---

Charity Registered Number 1136552

**Registered Office**

Montessori House, 135 Westcombe Hill, Blackheath, London, SE3 7DP

**Bankers**

CAF Bank Ltd

**Insurance Brokers**

Northern Counties Insurance LLP

Third Sector Protect

---

**Montessori Education for Autism**

---

**Statement of Financial Activities**for the year ended 31 December 2023

---

		<b>Restricted Funds 2023 £</b>	<b>Unrestricted Funds 2023 £</b>	<b>Total Funds 2023 £</b>	<i>Total funds 2022 £</i>
	Note				
<b>Incoming resources</b>					
Voluntary income	1		75,366	75,366	75,663
Activities	2		21,632	21,632	25,632
Investment Income	3		296	296	78
<b>Total Incoming Resources</b>		<u>0</u>	<u>97,294</u>	<u>97,294</u>	<u>101,373</u>
<b>Resources Expended</b>					
Charitable activities	4		107,429	107,429	105,476
Governance costs	5		600	600	1,036
<b>Total resources expended</b>		<u>0</u>	<u>108,029</u>	<u>108,029</u>	<u>106,512</u>
<b>Movement in total funds for the year</b>		0	(10,735)	(10,735)	
Total funds at 1 January 2022		0	29,573	29,573	
<b>Total funds at 31 December 2022</b>		<u>0</u>	<u>18,838</u>	<u>18,838</u>	

---

Montessori Education for Autism

---

Balance Sheet

as at 31 December 2023

---

	Note	2023	2022
		£	£
<b>Current Assets</b>			
Petty Cash Floats		372	-
Debtors	7	3,481	6,006
Total at Bank		15,696	23,927
		<hr/>	<hr/>
		19,549	29,933
<b>Creditors</b>			
Due within one year	8	731	360
		<hr/>	<hr/>
		18,818	29,573
		<hr/>	<hr/>
		<b>18,818</b>	<b>29,573</b>
		<hr/>	<hr/>
<b>Charity Funds</b>			
Unrestricted Funds	9	18,818	29,573
Restricted Funds	9	-	-
		<hr/>	<hr/>
		<b>18,818</b>	<b>29,573</b>
		<hr/>	<hr/>

The notes and policies on pages 4 to 6 form part of these Financial Statements

The Financial Statements were approved by the Trustees on April 28th, 2024  
and signed on their behalf by:



Roger Patenall FCA

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements**

for the year ended 31 December 2023

---

	<b>Restricted Funds 2023 £</b>	<b>Unrestricted Funds 2023 £</b>	<b>Total Funds 2023 £</b>	<i>Total Funds 2022 £</i>
<b>1 Voluntary Income</b>				
Donations		57,870	57,870	57,758
Gift Aid		17,496	17,496	17,905
	-	<u>75,366</u>	<u>75,366</u>	<u>75,663</u>
<b>2 Income from Activities</b>				
Registrations	-	420	420	350
Donations to Nurture Groups	-	18,760	18,760	15,802
Donations for SEN & Waldon Training	-	1,760	1,760	7,040
Proceeds of Insurance claim			-	1,727
Other fundraising	-	692	692	713
	-	<u>21,632</u>	<u>21,632</u>	<u>25,632</u>
<b>3 Investment Income</b>				
Bank Interest		296	296	78
<b>4 Expenditure on Charitable Activity</b>				
Summary by Fund Type:				
General Overheads		1,862	1,862	4,376
Administration costs		6,314	6,314	11,121
Purchase of Piano			-	2,000
Nurture Groups		91,943	91,943	81,327
Training		7,285	7,285	7,548
MEfA Fundraising Events		645	645	140
	-	<u>108,049</u>	<u>108,049</u>	<u>106,512</u>
Summary by expenditure type:				
Overheads and Admin		8,176	8,176	17,497
Nurture Groups		91,943	91,943	81,327
Training		7,285	7,285	7,548
MEfA Conference & Events		645	645	140
		<u>108,049</u>	<u>108,049</u>	<u>106,512</u>

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements, continued**

---

	<b>2023</b>	<b>2022</b>		
	<b>£</b>	<b>£</b>		
<b>5 Employee</b>				
In 2023 there was one employee (2022 - one) involved in the provision of charitable activity				
There were no employees whose annual remuneration was £60,000 or more.				
<b>6 Governance Costs</b>				
Accountancy Costs	600	500		
Visa Licence renewal		536		
		-		
	<u>600</u>	<u>1,036</u>		
<b>7 Net Income</b>				
This is stated after charging Accountancy Fees £600 (2022 - £500)				
During the year, no Trustee received any remuneration for acting as a Trustee (2022 - nil)				
During the year, no Trustee received any benefits in kind (2022 - nil)				
During the year, no Trustee received any reimbursement of expenses (2022 - nil)				
<b>8 Debtors</b>				
Prepayments	731	-		
Donation Pledged	-	3,256		
Sundry Debtors	2,750	2,750		
<b>9 Creditors</b>				
Expenses to be settled within one year	731			
<b>## Statement of funds</b>	Brought Forward	Incoming Resources	Resources Expended	Carried Forward
	£	£	£	£
Unrestricted funds	29,573	97,294	108,049	18,818
Restricted funds	0			0
	<u>29,573</u>	<u>97,294</u>	<u>108,049</u>	<u>18,818</u>

**1. Basis of preparation of the Financial Statements**

The Financial Statements have been prepared using the historical cost convention and in accordance with the Financial Reporting Standard for Smaller Entities. The Financial Statements have been prepared in accordance with the Statement of Recommended Practice - "Accounting and Reporting by Charities" and with applicable accounting standards.

The books of account are kept on a Receipts and Payments basis in accordance with Charity Commission advice for a charity of this size. The Financial Statements have been prepared making adjustments to reflect timing differences between the receipt and payment of monies and the year in which the activity takes place.

Payments of deposits to landlords in respect of rent obligations have been carried forward as debtors.

**2. Fund Accounting**

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for specific purposes.

Restricted funds are funds which are to be used in accordance with the specific restrictions imposed by donors and which have been raised by the charity for particular purposes.

**3. Incoming Resources**

All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with accuracy.

Gifts in Kind donated to the charity are included at valuation (subject to de minimis) and recognised as income at the time of receipt.

No amounts are included in the Financial Statements for services donated by volunteers. Donated services or facilities are included in income (subject to de minimis) at a valuation which is an estimate of the financial cost borne by the donor where such cost is quantifiable and measureable.

Income Tax recoverable in relation to donations received under Gift Aid is recognised at the time funds are received from HMRC.

**4 Resource expended**

All expenditure is accounted for at the time the funds are expended, except where detailed in note 1 above. Where costs cannot be directly attributed to one particular activity they have been allocated, so far as is practicable, on a basis consistent with the use of the resources.

Governance costs are those incurred in connection with the administration of the charity and in compliance with constitutional and statutory requirements.

**Report of the Independent Examiner to the trustees of Montessori Education for Autism for the year ended 31 December 2023.**

---

**Respective Responsibilities of the trustees and of the Examiner.**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required under section 144 of the Charities Act 2011 (the Act) and that an independent examination is needed.

It is my responsibility to:

- (1) examine the accounts under section 145 of the Act;
- (2) follow the procedures laid down in the General Directions given by the Charity Commission (under section 145(5)(b) of the Act), and
- (3) state whether particular matters have come to my attention.

**Basis of Independent Examiner's statement.**

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

**Independent Examiner's statement.**

In connection with my examination, no matter has come to my attention which gives me reasonable cause to believe that, in any material respect, the requirements to:

keep accounting records in accordance with section 130 of the Act and to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Act, have not been met, and furthermore, there are no matters to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Richard W Carey  
London.

24<sup>th</sup> April, 2024

## **Report of the Trustees for the year ended 31 December 2023**

---

The trustees present their Annual Report together with the Financial Statements of Montessori Education for Autism (“the charity” also “MEfA”) for the year ended 31 December 2023. The trustees confirm that the Annual Report and Financial Statements of the charity comply with current statutory requirements, the requirements of the charity’s governing document and the provisions of the Statement of Recommended Practice (SORP) Accounting and Reporting by Charities.

### **Objectives and Activities.**

The principal objectives of the charity, as defined by the Constitution, are:

- 1) to advance education of children with autism (and conditions related to autism) through methods of learning and education developed by Dr Maria Montessori and in connection with this:
- 2) to provide advice and support to families and carers of children with autism.
- 3) to provide information, advisory and advocacy services, training, day services, education, leisure and recreation for children with autism and to support others making similar provision.
- 4) to promote, conduct and engage in research into autism, and to publish the useful results of such research.
- 5) to collect and disseminate information relating to autism and to exchange such information with other bodies having similar objects.

The principal activities of the charity, are to:

- 1) provide classes during term time aimed at all children, but principally those with special education needs.
- 2) provide post-graduate training to professionals and others with interest in the development of children and the principles of Montessori Education
- 3) provide input to conferences and workshops, both those organized by the charity and by third parties.
- 4) provide support to families and schools by means of telephone and email helplines, and by personal meetings and presentations.

### **Public Benefit and delivering Social Value**

This year, again, all of our activities have provided immediate and visible benefit to those with special needs (principally autism related), their families and their carers. MEfA aims to keep its objects under review and to continue directing its energies to those who may benefit from the expertise of its people

**Structure, governance and management:**

**Organisational structure and decision making:**

Trustees

All trustees give their time voluntarily and received no benefits from the charity in their role as trustees.

The trustees consider that the Board of Trustees provides a wide spectrum of experience to MEfA. This experience covers autism, special needs education, the principles of learning devised by Dr Maria Montessori and others and also provides an insight into care and education in countries other than the United Kingdom.

Risk Management

The trustees are aware of their obligations and the need to provide a safe, healthy environment in which staff, volunteers, visitors and clients and their families can have confidence.

Policies are in place, and are reviewed on a regular basis, covering, inter alia, Protection of Children and Vulnerable People; Health and Safety, Use of Cameras and Mobile Recording Devices, Data Protection and Staff, Trustee and Visitor protocols, which include induction into the ethics, standards and procedures of MEfA.

**Achievements and Performance:**

Activity Report

All our child and parent activities, and assessments, are held at Montessori House. These groups continue their evolution from an Early Intervention Class for very small children and their parents with a strong focus on developing children's social, sensory, communication, language and coordination skills. Our flagship project, the Montessori Moles after-school nurture group for children ages 4-12 years, is often operating at capacity, helping children who are struggling to access their education at primary school because of difficulties associated with autism, such as sensory issues, social, communication and physical difficulties, anxiety, low self-esteem and poor self-regulation which often leads to behavioural problems.

We now have the following groups running each week during term time:

- Baby Montessori (children aged up to 18 months);
- Toddler Montessori (children aged from 15–36 months);
- Montessori Inclusive School (children aged from 2-12 years: 5 weekly groups);
- Montessori Moles: After-School Nurture Group (aged 4-12 years);
- Forest School / Wellbeing Sessions (two weekly groups for all ages);

---

## Montessori Education for Autism

---

We are hugely indebted to the number of volunteers and interns who have supported our activities again this year; we have a continuing stream of interest and enquiries about this aspect of our work. We are grateful also to the young people from overseas who spend time with us in spite of the procedure of obtaining the necessary visas.

By 31 December 2023 we had completed 24 cohorts of the MEfA Montessori post-graduate SEN CPD Short Course: Part 1 - A Blueprint for Observation, and as a result we have trained teachers, psychologists, social workers, early years educators, parents, a choreographer, an environmental designer, and other masters-grade students so they can apply Montessori special education methodology and philosophy to their work, thus providing other avenues for reaching out to children and adults with autism. We are also justifiably proud of our increasing professional links with mainstream organisations.

During the year MEfA was saddened by the news of the death of Carol Mannion. Carol had been a staunch supporter of MEfA in every activity. She had made memorable contributions at most MEfA conferences and had been an inspiration at the Waldon courses. In her memory it was decided that the Waldon course to be held in November 2023 would be free of charge to all delegates. Donations totalling £1,000 were however made to MEfA in her memory by several delegates.

In 2023 the number of children registered to our various sessions at Montessori House remained below the level pre-pandemic. This was expected and our budgets were reduced accordingly. Building up to our pre-pandemic level of activity is taking time and, although as the year progressed, enquiries picked up and we are starting 2024 with moderate activity in all classes.

### **Financial matters**

#### Funding

The total income of MEfA for 2023 was £97,294 (2022 - £101,373). Expenditure amounted to £108,029 (£106,512 in 2022). General overheads in 2023 amounted to £1,862 (2022 - £4,376). Every item of expenditure has been scrutinised and the reduction in overhead reflects this. The trustees believe that this level of overhead is acceptable for a charity of this size and includes: Subscriptions made, Insurance, Fundraising, Bank and credit card charges and Professional Fees.

These financial results reflect the ongoing challenging fundraising climate faced by MEfA in 2023, but also demonstrate the responsive manner in which the trustees have been able to match much of the expenditure to the income available. In line with many organisations in similar sectors, it is proving challenging to match our existing financial model to the increases in energy and utility costs. The trading loss of £10,700 in the accounts is accounted for by both a shortfall in parent donations for classes and increases in utility costs.

The trustees attach great importance and commensurate effort into raising as much of our financial needs from the activities run on a regular basis, and thereby minimise our dependence upon grants from outside donors. This policy will continue during 2024 and we expect the coming year to be equally challenging. Nevertheless, MEfA is extremely grateful to the donors listed below, and acknowledges that such donations will continue to be a vital part of our funding programme.

---

## Montessori Education for Autism

---

During 2023 grants, donations (including donations in kind) and funds were received from the following:

The Stephen Taylor Foundation  
The Bimal Family  
The Souter Charitable Trust  
Royal Borough of Greenwich (Neighbourhood Growth Fund)  
The Page Family  
The Elder Family  
The Arthur Family  
The Staal Family  
Design for Print  
Shalini Modi  
Babs Oduwale  
Mrs Anne Goodman  
Dr Asmita Mistry  
Paola Torrani

MEfA is grateful to all donors, including many whose time has been freely given but are not acknowledged above.

### Expenditure

As noted elsewhere, trustees are not reimbursed in respect of their activities as trustees and no expenses have been reimbursed to trustees during the year.

In accordance with Charity Commission guidelines the accounts have been kept using the receipts and payments method. In the Financial Statements, Deposit rents paid to agents of the landlord in respect of the properties at 135 and 135A Westcombe Hill are carried forward as prepayments. Payment of insurance premia for 2024 has been made in December 2023 on behalf of the charity. The charge is carried forward as a prepayment whilst a creditor is carried forward for reimbursement of the payment to the insurer. Deposits received in advance of future year programmes are carried forward as creditors.

During the latter part of the year, our existing energy supply agreements terminated. The new contracts are not strictly comparable as the terms are not as 'consumer-friendly' as the expiring contracts. However, the initial indications are that energy costs will rise by at least 75%.

### Reserves

The trustees are aware that the level of reserves is below an ideal level. All leaseholds are subject to three month notice of cancellation periods and the landlord holds deposits against much of this liability. Other than these leases the charity has no liabilities.

MEfA funds not immediately required are held on a bank deposit account. Investment returns have, for some years, been negligible. However, the last six months of 2023 generated income and we hope that this will now accelerate. The trustees consider that any extra returns that may be earned by seeking other uses for funds are outweighed by the inherent risks in taking such action

**Plans for the future and appreciation**

At the time of preparation of this report, the outlook for 2024 remains very unclear, in spite of the success of the Covid vaccines programme there still remains the possibility of future infection.

Our Forest School continues to be developed and is evolving with an eye to the future. Elsewhere our plans are all focussed on preparation of the environment and, in particular, staff training , to ensure that we are well prepared as numbers of children attending MEfA continue to build up.

We are confident that, whatever challenges are encountered, we will continue to offer as full a range as possible of activities through 2024. MEfA, in turn, could not operate without the continuing efforts of our staff, volunteers, donors and families for which we place on record our heartfelt thanks.

This report was approved by the Trustees on 28<sup>th</sup> April 2024 and signed on their behalf by:



Wendy Fidler

---

## Montessori Education for Autism

---

### Testimonials

---

I cannot thank you and the staff at MEfA enough for welcoming us in and giving A (and all of us!) those months of nurtured learning. I remember the warm and comforting atmosphere of your classrooms with fondness. I think it made the world of difference to be in that setting after A's bad experience and all of his family members who accompanied him there really appreciated that.

*Dr R P*

Hi Wendy . . . I just wanted to say thank you so much for your help with the girls. We really enjoy attending and we've learnt so much already. Sorry if I'm a bit distracted when you speak to me, I'm always making mental notes . . .

*MF*

We met when you came to X School some years ago to do some staff training . . . Your talk was fascinating and has stayed with me to this day. . . I now work at X College (Nursery through to 6th form) and wonder if you still offer staff training. It would be of great benefit to our SEND team and better equip us to meet the needs of some of our children?

*Mrs S G*

. . . I just wanted to thank you again for the most wonderful, captivating, emotional, inspiring and educational course I have ever been on. Your vast knowledge of how to use Montessori materials for children with special needs is something I will never forget . . .

*Katherine N. a delegate at the Bergen conference workshop day*

I have just attended the lecture and heard your closing comments. I just wanted to share my excitement at having your voice heard. I feel you have opened my eyes into a world I was not fully aware of. . . . I would love to find ways to improve my abilities and learn more ways to help (these children) to integrate in the class.

*D, a teacher from Israel*

I'd like to enrol on the second part of the course as I really enjoyed Part 1. . . Cohort 23 has been for me life changing . . .

*DC - An Italian student*

I wish to convey my profound appreciation to my lecturer and thesis supervisor. Professor Wendy Fidler, Her continual source of inspiration, steadfast support, and intellectual provocations have not merely piqued my interest but have significantly broadened my comprehension and insight into the Montessori Pedagogy and MEfA Methodology.

*PT - Another Italian student*

---

## Montessori Education for Autism

---

### Testimonials

---

I Am currently pursuing my diploma course in SLD from India and just cannot forget the journey I had in MEFA. Thank you for the immense knowledge that you shared. As I'm doing my project I just can't stop thinking about my time in your school. Thank you so much

*Sapna U. (SEN graduate)*

Dear Wendy,

Thank you very much for the programme (*for M, during Lockdown*). It is fantastic, we are implementing it well.

. . . .

Thank you very much for all your help, support and reassurance, having you in our lives is a great privilege!

*M's Mum (June 2020)*

Dear Wendy,

I just wanted to send you, Rathi and the rest of your team a huge thank you for your support and tutelage since September. We really appreciate the time you have spent planning the session and personalising the activities for R. I think this has made an enormous difference and helped R to make some progress this term.

Thank you also for making J (*sibling*) so welcome.

Moreover, even in these uncertain waters, MEFA has always remained a steady and constant vessel. Your commitment and bravery is incredibly admirable and we have been very grateful for this.

*L - a Mum (December 2020)*

"I have such fond memories of your Montessori preschool at Mycenae House. I remember you introduced me to the concept of children working hard through observation, that they are constantly learning even when they don't appear to be actively engaged."

*The Mum of a former toddler pupil reaching his 11th birthday.*

I discovered Montessori's Method, fell in love with it and qualified as a Montessori teacher. After that I did a post grad diploma with Montessori Education for Autism. What I learnt gave me the confidence to dismantle the various methods, choose what I needed, and re-build them into my own version. . . ( Thank you Wendy Fidler)

*Chi Boakye (SEN Training, Cohort 4)*

**MONTESSORI EDUCATION FOR AUTISM**

England & Wales - Charity number 1136552

---

# Accounts

---

Charity Number 1136552

---

## **Montessori Education for Autism**

---

Report of the Trustees  
and  
Independently Examined Financial Statements  
for the year ended 31 December 2022

---

**Montessori Education for Autism**

---

**Contents**

---

	Page
Trustees of the Charity	1
Reference and administrative details of the charity	1
Statement of Financial Activities	2
Balance Sheet	3
Notes to the Financial Statements	4 - 5
Accounting Policies	6
Report of the Independent Examiner	7
Report of the Trustees	8 - 12
Testimonials	13

---

**Montessori Education for Autism**

---

**Trustees of the Charity**

---

Wendy Fidler	**	<i>Chair, Academic Director</i>
Roger Patenall	**	<i>Treasurer</i>
Shalini Modi	**	
Ashok Kumar		
Rachel Spooner		
David Stott		
Delphine Marcillaud		
Katalin Lovassy		

\*\* *Members of the Executive Committee*

---

**Reference and administrative details of the charity**

---

Charity Registered Number 1136552

**Registered Office**

Montessori House, 135 Westcombe Hill, Blackheath, London, SE3 7DP

**Bankers**

CAF Bank Ltd

**Insurance Brokers**

Northern Counties Insurance LLP

Third Sector Protect

---

**Montessori Education for Autism**

---

**Statement of Financial Activities**for the year ended 31 December 2022

---

		<b>Restricted Funds 2022</b>	<b>Unrestricted Funds 2022</b>	<b>Total Funds 2022</b>	<i>Total funds 2021</i>
	Note	£	£	£	£
<b>Incoming resources</b>					
Voluntary income	1	5,349	70,314	75,663	74,384
Activities	2		25,632	25,632	31,096
Investment Income	3		78	78	4
<b>Total Incoming Resources</b>		<u>5,349</u>	<u>96,024</u>	<u>101,373</u>	<u>105,484</u>
<b>Resources Expended</b>					
Charitable activities	4	5,349	100,127	105,476	100,424
Governance costs	5		1,036	1,036	500
<b>Total resources expended</b>		<u>5,349</u>	<u>101,163</u>	<u>106,512</u>	<u>100,924</u>
<b>Movement in total funds for the year</b>		0	(5,139)	(5,139)	
Total funds at 1 January 2022		0	34,712	34,712	
<b>Total funds at 31 December 2022</b>		<u><u>0</u></u>	<u><u>29,573</u></u>	<u><u>29,573</u></u>	

---

**Montessori Education for Autism**

---

**Balance Sheet**

as at 31 December 2022

---

	Note	2022	2021
		£	£
<b>Current Assets</b>			
Petty Cash Floats		-	195
Debtors	7	6,006	6,573
Total at Bank		23,927	28,444
		<hr/>	<hr/>
		29,933	35,212
<b>Creditors</b>			
Due within one year	8	360	500
		<hr/>	<hr/>
		29,573	34,712
		<hr/>	<hr/>
		<b>29,573</b>	<b>34,712</b>
		<hr/>	<hr/>
<b>Charity Funds</b>			
Unrestricted Funds	9	29,573	34,712
Restricted Funds	9	-	-
		<hr/>	<hr/>
		<b>29,573</b>	<b>34,712</b>
		<hr/>	<hr/>

The notes and policies on pages 4 to 6 form part of these Financial Statements

The Financial Statements were approved by the Trustees on April 28th, 2023  
and signed on their behalf by:



Roger Patenall FCA

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements**

for the year ended 31 December 2022

---

	<b>Restricted Funds 2022 £</b>	<b>Unrestricted Funds 2022 £</b>	<b>Total Funds 2022 £</b>	<i>Total Funds 2021 £</i>
<b>1 Voluntary Income</b>				
Donations	5,349	52,409	57,758	57,652
Gift Aid		17,905	17,905	16,732
	<u>5,349</u>	<u>70,314</u>	<u>75,663</u>	<u>74,384</u>
<b>2 Income from Activities</b>				
Registrations	-		350	430
Donations to Nurture Groups	-		15,802	23,512
Donations for SEN & Waldon Training	-		7,040	6,360
Proceeds of Insurance claim			1,727	
MEfA Conferences & Events	-	-		-
Other fundraising	-		713	794
	<u>-</u>	<u>-</u>	<u>25,632</u>	<u>31,096</u>
<b>3 Investment Income</b>				
Bank Interest			78	4
			<u>78</u>	<u>4</u>
<b>4 Expenditure on Charitable Activity</b>				
Summary by Fund Type:				
General Overheads			4,376	2,603
Administration costs			11,121	6,067
Purchase of Piano			2,000	
Nurture Groups			81,327	82,901
Training			7,548	9,178
MEfA Conferences & Events			140	155
	<u>-</u>	<u>-</u>	<u>106,512</u>	<u>100,904</u>
Summary by expenditure type:				
Overheads and Admin			17,497	8,670
Nurture Groups			81,327	82,901
Training			7,548	9,178
MEfA Conference & Events			140	155
			<u>106,512</u>	<u>100,904</u>

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements, continued**

---

	<b>2022</b>	<i>2021</i>		
	<b>£</b>	<b>£</b>		
<b>5 Employee</b>				
In 2022 there was one employee (2021 - one) involved in the provision of charitable activity				
There were no employees whose annual remuneration was £60,000 or more.				
<b>6 Governance Costs</b>				
Accountancy Costs	500	400		
Visa Licence renewal	536	-		
	-	-		
	<u>1,036</u>	<u>400</u>		
<b>7 Net Income</b>				
This is stated after charging Accountancy Fees £500 (2021 - £400)				
During the year, no Trustee received any remuneration for acting as a Trustee (2021 - nil)				
During the year, no Trustee received any benefits in kind (2021- nil)				
During the year, no Trustee received any reimbursement of expenses (2021 - nil)				
<b>8 Debtors</b>				
Trade debtors, due within one year		2,750		
Donation Pledged		3,256		
Sundry Debtors		-		
<b>9 Creditors</b>				
Fees received, due within one year		360		
<b>## Statement of funds</b>	Brought Forward	Incoming Resources	Resources Expended	Carried Forward
	£	£	£	£
Unrestricted funds	34,712	96,024	101,163	29,573
Restricted funds	0	5,349	5,349	0
	<u>34,712</u>	<u>101,373</u>	<u>106,512</u>	<u>29,573</u>

**1. Basis of preparation of the Financial Statements**

The Financial Statements have been prepared using the historical cost convention and in accordance with the Financial Reporting Standard for Smaller Entities. The Financial Statements have been prepared in accordance with the Statement of Recommended Practice - "Accounting and Reporting by Charities" and with applicable accounting standards.

The books of account are kept on a Receipts and Payments basis in accordance with Charity Commission advice for a charity of this size. The Financial Statements have been prepared making adjustments to reflect timing differences between the receipt and payment of monies and the year in which the activity takes place.

Payments of deposits to landlords in respect of rent obligations have been carried forward as debtors.

**2. Fund Accounting**

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for specific purposes.

Restricted funds are funds which are to be used in accordance with the specific restrictions imposed by donors and which have been raised by the charity for particular purposes.

**3. Incoming Resources**

All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with accuracy.

Gifts in Kind donated to the charity are included at valuation (subject to de minimis) and recognised as income at the time of receipt.

No amounts are included in the Financial Statements for services donated by volunteers. Donated services or facilities are included in income (subject to de minimis) at a valuation which is an estimate of the financial cost borne by the donor where such cost is quantifiable and measureable.

Income Tax recoverable in relation to donations received under Gift Aid is recognised at the time funds are received from HMRC.

**4 Resource expended**

All expenditure is accounted for at the time the funds are expended, except where detailed in note 1 above. Where costs cannot be directly attributed to one particular activity they have been allocated, so far as is practicable, on a basis consistent with the use of the resources.

Governance costs are those incurred in connection with the administration of the charity and in compliance with constitutional and statutory requirements.

**Report of the Independent Examiner to the trustees of Montessori Education for Autism for the year ended 31 December 2022.**

---

**Respective Responsibilities of the trustees and of the Examiner.**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required under section 144 of the Charities Act 2011 (the Act) and that an independent examination is needed.

It is my responsibility to:

- (1) examine the accounts under section 145 of the Act;
- (2) follow the procedures laid down in the General Directions given by the Charity Commission (under section 145(5)(b) of the Act), and
- (3) state whether particular matters have come to my attention.

**Basis of Independent Examiner's statement.**

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

**Independent Examiner's statement.**

In connection with my examination, no matter has come to my attention which gives me reasonable cause to believe that, in any material respect, the requirements to:

keep accounting records in accordance with section 130 of the Act and to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Act, have not been met, and furthermore, there are no matters to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Richard W Carey  
London.

24<sup>th</sup> February, 2023

## **Report of the Trustees for the year ended 31 December 2022**

---

The trustees present their Annual Report together with the Financial Statements of Montessori Education for Autism ('the charity' also 'MEfA') for the year ended 31 December 2022. The trustees confirm that the Annual Report and Financial Statements of the charity comply with current statutory requirements, the requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities".

### **Objectives and Activities.**

The principal objectives of the charity, as defined by the Constitution, are:

- 1) to advance education of children with autism (and conditions related to autism) through methods of learning and education developed by Maria Montessori and in connection with this:
- 2) to provide advice and support to families and carers of children with autism.
- 3) to provide information, advisory and advocacy services, training, day services, education, leisure and recreation for children with autism and to support others making similar provision.
- 4) to promote, conduct and engage in research into autism, and to publish the useful results of such research.
- 5) to collect and disseminate information relating to autism and to exchange such information with other bodies having similar objects.

The principal activities of the charity, are to:

- 1) provide classes during term time aimed at all children, but principally those with special education needs.
- 2) provide post-graduate training to professionals and others with interest in the development of children and the principles of Montessori Education
- 3) provide input to conferences and workshops, both those organized by the charity and by third parties.
- 4) provide support to families and schools by means of telephone and email helplines, and by personal meetings and presentations.

### **Public Benefit and delivering Social Value**

This year, again, all of our activities have provided immediate and visible benefit to those with special needs (principally autism related), their families and their carers. MEfA aims to keep its objects under review and to continue directing its energies to those who may benefit from the expertise of its people

**Structure, governance and management:**

**Organisational structure and decision making:**

Trustees

All trustees give their time voluntarily and received no benefits from the charity in their role as Trustees.

The trustees consider that the Board of Trustees provides a wide spectrum of experience to MEfA. This experience covers autism, special needs education, the principles of learning devised by Dr Maria Montessori and others and also provides an insight into care and education in countries other than the United Kingdom.

Risk Management

The trustees are aware of their obligations and the need to provide a safe, healthy environment in which staff, volunteers, visitors and clients and their families can have confidence.

Policies are in place, and are reviewed on a regular basis, covering, inter alia, Protection of Children and Vulnerable People; Health and Safety, Use of Cameras and Mobile Recording Devices, Data Protection and Staff, Trustee and Visitor protocols, which include induction into the ethics, standards and procedures of MEfA.

.

**Achievements and Performance:**

Activity Report

All our child and parent activities, and assessments, are held at Montessori House. These groups continue their evolution from an Early Intervention Class for very small children and their parents with a strong focus on developing children's social, sensory, communication, language and coordination skills. Our flagship project, the Montessori Moles after-school nurture group for children ages 4-12 years, is often operating at capacity, helping children who are struggling to access their education at primary school because of difficulties associated with autism, such as sensory issues, social, communication and physical difficulties, anxiety, low self-esteem and poor self-regulation which often leads to behavioural problems.

We now have the following groups running each week during term time:

- Baby Montessori (children aged up to 18 months);
- Toddler Montessori (children aged from 15–36 months);
- Montessori Inclusive School (children aged from 2-9 years: 5 weekly groups);
- Montessori Moles: After-School Nurture Group (aged 4-12 years);
- Forest School / Wellbeing Sessions (two weekly groups);
- Support for Ukrainian Speaking families.

---

## Montessori Education for Autism

---

We are hugely indebted to the number of volunteers and interns who have supported our activities again this year; we have a continuing stream of interest and enquiries about this aspect of our work. We are grateful also to the young people from overseas who spend time with us in spite of the cumbersome procedure of obtaining the necessary visas.

By 31 December 2022 we had completed 23 cohorts of the MEfA Montessori post-graduate SEN CPD Short Course: Part 1 - A Blueprint for Observation, and as a result we have trained teachers, psychologists, social workers, early years educators, parents, a choreographer, an environmental designer, and other masters-grade students so they can apply Montessori special education methodology and philosophy to their work, thus providing other avenues for reaching out to children and adults with autism. We are also justifiably proud of our increasing professional links with mainstream organisations.

in 2022 the number of children registered to our various sessions at Montessori House remained below the level pre-pandemic. This was expected and our budgets were reduced accordingly. Building up to our pre-pandemic level of activity is taking time and, as the year progressed, enquiries picked up and we are starting 2023 with much increased activity in all classes.

### **Financial matters**

#### Funding

The total income of MEfA for 2022 was £101,373 (2021 - £105,484). Expenditure amounted to £106,512 (against £100,924 in 2021). General overheads in 2022 amounted to £4,376 (2020 - £2,603). The significant item this year was the acquisition of a sophisticated electronic keyboard/piano for a notional sum of £2,000. This purchased was fully funded by a parent donation. The Trustees believe that the remaining level of overhead is acceptable for a charity of this size and includes: Subscriptions made, Insurance, Fundraising, Bank and credit card charges and Professional Fees.

These financial results reflect the ongoing challenging fundraising climate faced by MEfA in 2022, but also demonstrate the responsive manner in which the trustees have been able to match the expenditure to the income available. The trading loss of £5,139 in the accounts is accounted for by the shortfall in parent donations for classes, which match the shortfall against our budget.

The trustees attach great importance and commensurate effort into raising as much of our financial needs from the activities run on a regular basis, and thereby minimise our dependence upon grants from outside donors. This policy will continue during 2023 and we face the coming year with much greater optimism. Nevertheless, MEfA is extremely grateful to the donors listed below, and acknowledges that such donations will continue to be a vital part of our funding programme.

#### Donations

During 2022, grants, donations (including donations in kind) and funds were received from the following:

The Julia & Hans Rausing Charitable Trust (Special Covid Fund for 2021/22)

The Kelly Family Charitable Trust (Special Covid Fund for 2021/22)

The Stephen Taylor Foundation

The Bimal Family

Anna Potkina & Russell Ferguson

Royal Borough of Greenwich (Neighbourhood Growth Fund)

Greenwich GoodGym (who were unable to visit in 2022, but whose previous work continued to enhance the MEfA environment throughout the year, and whose visits will recommence in 2023)

---

## Montessori Education for Autism

---

The Page Family  
The Elder Family  
The Arthur Family  
The Staal Family  
Design for Print

MEfA is grateful to all donors, including many whose time has been freely given but are not acknowledged above.

### Expenditure

As noted elsewhere, trustees are not reimbursed in respect of their activities as trustees and no expenses have been reimbursed to trustees during the year.

In accordance with Charity Commission guidelines the accounts have been kept using the receipts and payments method. In the Financial Statements, Deposit rents paid to agents of the landlord in respect of the properties at 135 and 135A Westcombe Hill are carried forward as prepayments. Payment of certain expenses for 2023 has been made in December 2022 and is carried forward as a prepayment. Deposits received in advance of 2023 training programmes are included in creditors

Expenditure has again been tightly controlled during 2022. As mentioned above, the opportunity arose to acquire a high quality keyboard/piano. The cost of this was fully met by a parent. During 2022, the charity also accepted invitations to make a major presentation at the Nordic Montessori Conference in Bergen, and to attend the annual Montessori Retreat in the Netherlands. The costs of attending both these events were fully met by private donations.

During the latter part of the year, our existing energy supply agreements terminated. The new contracts are not strictly comparable as the terms are not as 'consumer-friendly' as the expiring contracts. However, the initial indications are that energy costs will rise by at least 75%.

### Reserves

The trustees consider that the level of reserves is satisfactory. The total annual expenditure of the charity is approximately £100,000 on an ongoing basis. Of this approximately £40,000 relates to salaries which are financed in full by a private donor. The remaining expenditure is approximately £60,000 per year, and the free reserves of the charity equate approximately to 6 months expenditure. All leaseholds are subject to three month notice of cancellation periods and the landlord holds deposits against much of this liability.

### Investment Review

MEfA funds not immediately required are held on a bank deposit account. Investment returns have, for some years, been negligible. However, the last three months of 2022 generated income and we hope that this will now accelerate. The trustees consider that any extra returns that may be earned by seeking other uses for funds are outweighed by the inherent risks in taking such action

**Plans for the future and appreciation**

At the time of preparation of this report, the outlook for 2023 remains very unclear, in spite of the success of the Covid vaccines programme there still remains the possibility of future infection.

Our Forest School continues to be developed and is evolving with an eye to the future. Elsewhere our plans are all focussed on preparation of the environment and, in particular, staff training , to ensure that we are well prepared as numbers of children attending MEfA continue to build up.

We are confident that, whatever challenges are encountered, we will continue to offer as full a range as possible of activities through 2023. MEfA, in turn, could not operate without the continuing efforts of our staff, volunteers, donors and families for which we place on record our heartfelt thanks.

This report was approved by the Trustees on 28<sup>th</sup> April 2023 and signed on their behalf by:



Wendy Fidler

---

## Montessori Education for Autism

---

### Testimonials - 2022

---

I cannot thank you and the staff at MEfA enough for welcoming us in and giving A (and all of us!) those months of nurtured learning. I remember the warm and comforting atmosphere of your classrooms with fondness. I think it made the world of difference to be in that setting after A's bad experience and all of his family members who accompanied him there really appreciated that.

*Dr R P*

Hi Wendy . . . I just wanted to say thank you so much for your help with the girls. We really enjoy attending and we've learnt so much already. Sorry if I'm a bit distracted when you speak to me, I'm always making mental notes . . .

*MF*

We met when you came to X School some years ago to do some staff training . . . Your talk was fascinating and has stayed with me to this day. . . I now work at X College (Nursery through to 6th form) and wonder if you still offer staff training. It would be of great benefit to our SEND team and better equip us to meet the needs of some of our children?

*Mrs S G*

. . . I just wanted to thank you again for the most wonderful, captivating, emotional, inspiring and educational course I have ever been on. Your vast knowledge of how to use Montessori materials for children with special needs is something I will never forget . . .

*Katherine N. a delegate at the Bergen conference workshop day*

I have just attended the lecture and heard your closing comments. I just wanted to share my excitement at having your voice heard. I feel you have opened my eyes into a world I was not fully aware of. . . . I would love to find ways to improve my abilities and learn more ways to help (these children) to integrate in the class.

*D, a teacher from Israel*

I'd like to enrol on the second part of the course as I really enjoyed Part 1 . . . Cohort 23 has been for me life changing . . .

*DC - An Italian student*

I Am currently pursuing my diploma course in SLD from India and just cannot forget the journey I had in MEFA. Thank you for the immense knowledge that you shared. As I'm doing my project I just can't stop thinking about my time in your school. Thank you so much

*Sapna U. (SEN graduate)*

Dear Wendy,

Thank you very much for the programme (*for M, during Lockdown*). It is fantastic, we are implementing it well.

. . . .

Thank you very much for all your help, support and reassurance, having you in our lives is a great privilege!

*M's Mum (June 2020)*

Dear Wendy,

I just wanted to send you, Rathi and the rest of your team a huge thank you for your support and tutelage since September. We really appreciate the time you have spent planning the session and personalising the activities for R. I think this has made an enormous difference and helped R to make some progress this term.

Thank you also for making J (*sibling*) so welcome.

Moreover, even in these uncertain waters, MEFA has always remained a steady and constant vessel. Your commitment and bravery is incredibly admirable and we have been very grateful for this.

*L - a Mum (December 2020)*

"I have such fond memories of your Montessori preschool at Mycenae House. I remember you introduced me to the concept of children working hard through observation, that they are constantly learning even when they don't appear to be actively engaged."

*The Mum of a former toddler pupil reaching his 11th birthday.*

I discovered Montessori's Method, fell in love with it and qualified as a Montessori teacher. After that I did a post grad diploma with Montessori Education for Autism. What I learnt gave me the confidence to dismantle the various methods, choose what I needed, and re-build them into my own version. . . ( Thank you Wendy Fidler)

*Chi Boakye (SEN Training, Cohort 4)*

**MONTESSORI EDUCATION FOR AUTISM**

England & Wales - Charity number 1136552

---

# Accounts

---

Charity Number 1136552

---

## Montessori Education for Autism

---

Report of the Trustees  
and  
Independently Examined Financial Statements  
for the year ended 31 December 2021



---

**Montessori Education for Autism**

---

**Contents**

---

	Page
Trustees of the Charity	1
Reference and administrative details of the charity	1
Statement of Financial Activities	2
Balance Sheet	3
Notes to the Financial Statements	4 - 5
Accounting Policies	6
Report of the Independent Examiner	7
Report of the Trustees	8 - 12
Testimonials	13

---

**Montessori Education for Autism**

---

**Trustees of the Charity**

---

Wendy Fidler	**	<i>Chair, Academic Director</i>
Roger Patenall	**	<i>Treasurer</i>
Shalini Modi	**	
Ashok Kumar		
Rachel Spooner		
David Stott		
Delphine Marcillaud		
Katalin Lovassy		

\*\* *Members of the Executive Committee*

---

**Reference and administrative details of the charity**

---

Charity Registered Number 1136552

**Registered Office**

Montessori House, 135 Westcombe Hill, Blackheath, London, SE3 7DP

**Bankers**

CAF Bank Ltd

**Insurance Brokers**

Northern Counties Insurance LLP

---

**Montessori Education for Autism**

---

**Statement of Financial Activities**for the year ended 31 December 2021

---

		<b>Restricted Funds 2021 £</b>	<b>Unrestricted Funds 2021 £</b>	<b>Total Funds 2021 £</b>	<i>Total funds 2020 £</i>
	Note				
<b>Incoming resources</b>					
Voluntary income	1	5,985	68,399	74,384	80,077
Activities	2		31,096	31,096	35,748
Investment Income	3		4	4	22
<b>Total Incoming Resources</b>		<u>5,985</u>	<u>99,499</u>	<u>105,484</u>	<u>115,847</u>
<b>Resources Expended</b>					
Charitable activities	4	5,985	94,439	100,424	103,960
Governance costs	5		500	500	400
<b>Total resources expended</b>		<u>5,985</u>	<u>94,939</u>	<u>100,924</u>	<u>104,360</u>
<b>Movement in total funds for the year</b>		0	4,580	4,580	
Total funds at 1 January 2021		0	30,132	30,132	
<b>Total funds at 31 December 2021</b>		<u><u>0</u></u>	<u><u>34,712</u></u>	<u><u>34,712</u></u>	

---

**Montessori Education for Autism**

---

**Balance Sheet**as at 31 December 2021

---

	Note	2021 £	2020 £
<b>Current Assets</b>			
Petty Cash Floats		195	254
Debtors	7	6,573	3,833
Total at Bank		28,444	26,045
		<u>35,212</u>	<u>30,132</u>
<b>Creditors</b>			
Due within one year	8	500	-
		<u>34,712</u>	<u>30,132</u>
		<u><b>34,712</b></u>	<u><b>30,132</b></u>
<b>Charity Funds</b>			
Unrestricted Funds	9	34,712	21,582
Restricted Funds	9	-	8,550
		<u><b>34,712</b></u>	<u><b>30,132</b></u>

The notes and policies on pages 4 to 6 form part of these Financial Statements

The Financial Statements were approved by the Trustees on 8th January, 2022  
and signed on their behalf by:



Roger Patenall FCA

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements**

for the year ended 31 December 2021

---

	<b>Restricted Funds 2021 £</b>	<b>Unrestricted Funds 2021 £</b>	<b>Total Funds 2021 £</b>	<i>Total Funds 2020 £</i>
<b>1 Voluntary Income</b>				
Donations	5,985	51,667	57,652	65,232
Gift Aid		16,732	16,732	14,845
	<u>5,985</u>	<u>68,399</u>	<u>74,384</u>	<u>80,077</u>
<b>2 Income from Activities</b>				
Registrations	-	430	430	400
Donations to Nurture Groups	-	23,512	23,512	29,385
Donations for SEN & Waldon Training	-	6,360	6,360	5,730
MEfA Conferences & Events	-	-	-	-
Other fundraising	-	794	794	233
	<u>-</u>	<u>31,096</u>	<u>31,096</u>	<u>35,748</u>
<b>3 Investment Income</b>				
Bank Interest		4	4	22
<b>4 Expenditure on Charitable Activity</b>				
Summary by Fund Type:				
General Overheads		2,603	2,603	1,859
Administration costs		6,067	6,067	9,678
Nurture Groups		82,901	82,901	85,021
SEN & Waldon Training		9,178	9,178	7,802
MEfA Conferences & Events		155	155	-
	<u>-</u>	<u>100,904</u>	<u>100,904</u>	<u>104,360</u>
Summary by expenditure type:				
Overheads and Admin			8,670	11,537
Nurture Groups			82,901	85,021
SEN & Waldon Training			9,178	7,802
MEfA Conference & Events			155	-
			<u>100,904</u>	<u>104,360</u>

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements, continued**

---

	<b>2021</b>	<b>2020</b>		
	<b>£</b>	<b>£</b>		
<b>5 Employee</b>				
In 2020 there was one employee (2019 - one) involved in the provision of charitable activity				
There were no employees whose annual remuneration was £60,000 or more.				
<b>6 Governance Costs</b>				
Accountancy Costs	400	400		
Meeting Expenses	-	-		
Bank charges	-	-		
Postage	-	-		
	<u>400</u>	<u>400</u>		
<b>7 Net Income</b>				
This is stated after charging Accountancy Fees	400	400		
During the year, no Trustee received any remuneration for acting as a Trustee (2019 - nil)				
During the year, no Trustee received any benefits in kind (2019 - nil)				
During the year, no Trustee received any reimbursement of expenses (2019 - nil)				
<b>8 Debtors</b>				
Trade debtors, due within one year	2,750	2,750		
Donation Pledged	-	-		
Sundry Debtors	1,083	1,083		
<b>9 Creditors</b>				
Expense accrued, due within one year		-		
<b>## Statement of funds</b>	Brought Forward	Incoming Resources	Resources Expended	Carried Forward
	£	£	£	£
Unrestricted funds	21,582			21,582
Restricted funds	8,550			8,550
	<u>30,132</u>	<u>0</u>	<u>0</u>	<u>30,132</u>

**1. Basis of preparation of the Financial Statements**

The Financial Statements have been prepared using the historical cost convention and in accordance with the Financial Reporting Standard for Smaller Entities. The Financial Statements have been prepared in accordance with the Statement of Recommended Practice - "Accounting and Reporting by Charities" and with applicable accounting standards.

The books of account are kept on a Receipts and Payments basis in accordance with Charity Commission advice for a charity of this size. The Financial Statements have been prepared making adjustments to reflect timing differences between the receipt and payment of monies and the year in which the activity takes place.

Payments of deposits to landlords in respect of rent obligations have been carried forward as debtors.

**2. Fund Accounting**

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for specific purposes.

Restricted funds are funds which are to be used in accordance with the specific restrictions imposed by donors and which have been raised by the charity for particular purposes.

**3. Incoming Resources**

All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with accuracy.

Gifts in Kind donated to the charity are included at valuation (subject to de minimis) and recognised as income at the time of receipt.

No amounts are included in the Financial Statements for services donated by volunteers. Donated services or facilities are included in income (subject to de minimis) at a valuation which is an estimate of the financial cost borne by the donor where such cost is quantifiable and measureable.

Income Tax recoverable in relation to donations received under Gift Aid is recognised at the time funds are received from HMRC.

**4 Resource expended**

All expenditure is accounted for at the time the funds are expended, except where detailed in note 1 above. Where costs cannot be directly attributed to one particular activity they have been allocated, so far as is practicable, on a basis consistent with the use of the resources.

Governance costs are those incurred in connection with the administration of the charity and in compliance with constitutional and statutory requirements.

**Report of the Independent Examiner to the trustees of Montessori Education for Autism for the year ended 31 December 2021.**

---

**Respective Responsibilities of the trustees and of the Examiner.**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required under section 144 of the Charities Act 2011 (the Act) and that an independent examination is needed.

It is my responsibility to:

- (1) examine the accounts under section 145 of the Act;
- (2) follow the procedures laid down in the General Directions given by the Charity Commission (under section 145(5)(b) of the Act), and
- (3) state whether particular matters have come to my attention.

**Basis of Independent Examiner's statement.**

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

**Independent Examiner's statement.**

In connection with my examination, no matter has come to my attention which gives me reasonable cause to believe that, in any material respect, the requirements to:

keep accounting records in accordance with section 130 of the Act and to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Act, have not been met, and furthermore, there are no matters to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Richard W Carey  
London.

26<sup>th</sup> March, 2022

## **Report of the Trustees for the year ended 31 December 2021**

---

The trustees present their Annual Report together with the Financial Statements of Montessori Education for Autism ('the charity' also 'MEfA') for the year ended 31 December 2021. The trustees confirm that the Annual Report and Financial Statements of the charity comply with current statutory requirements, the requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities".

### **Covid 19**

In 2020 we broke with tradition by starting our Trustee Report with what we hoped would be a one-off review of the charity's response to the Covid 19 pandemic. Sadly, this subject remains the dominant factor that has affected all of our activities again in 2021, and already our return to school in January 2022 has been marked by Covid 19 related changes and complications.

In line with all educational establishments in England we remained closed during January and February 2021, and reopened in March. Due largely to the strict protocols that we had in place, and the unrelenting efforts of the staff to constantly clean and disinfect every item after every class, MEfA was then able to remain open throughout the remainder of 2021.

This availability was much appreciated by many families for whom MEfA is their weekly 'life-line'. However, from the point of view of the charity this came with a heavy financial cost. Numbers of families attending were varying from under one half of the normal enrolment to just under two thirds. However, the costs remain fixed for the most part regardless of numbers, and, once again, the HM government furlough scheme provided the difference between remaining solvent and having to close.

As in 2020, we were unable to hold any of our usual conferences and other events, again with a negative impact on our finances.

**Structure, governance and management:**

a) Organisational structure and decision making:

Trustees

All trustees give their time voluntarily and received no benefits from the charity in their role as Trustees.

The trustees consider that the Board of Trustees provides a wide spectrum of experience to MEfA. This experience covers autism, special needs education, the principles of learning devised by Dr Maria Montessori and others and also provides an insight into care and education in countries other than the United Kingdom.

b) Risk Management

The trustees are aware of their obligations and the need to provide a safe, healthy environment in which staff, volunteers, visitors and clients and their families can have confidence.

Policies are in place, and are reviewed on a regular basis, covering, inter alia, Protection of Children and Vulnerable People; Health and Safety, Use of Cameras and Mobile Recording Devices, Data Protection and Staff, Trustee and Visitor protocols, which include induction into the ethics, standards and procedures of MEfA.

**Objectives and Activities:**

a) Aims and Objectives

Our charity's objectives are as set out in The Objects clause of our constitution which was adopted on 28 February 2009. In summary, these are to benefit the public by advancing the education of children with autism (and conditions related to autism) through methods of learning and education developed by Dr Maria Montessori

A full report on our activities in 2020 and how we have strived to achieve these objectives appears at the section headed Achievements and Performance below and in our Covid 19 report above.

b) Public Benefit

This year, again, all of our activities have provided immediate and visible benefit to those with special needs (principally autism related), their families and their carers. MEfA aims to keep its objects under review and to continue directing its energies to those who may benefit from the expertise of its people.

**Achievements and Performance:**

a) Activity Report

All our child and parent activities, and assessments, are held at Montessori House. These groups continue their evolution from an Early Intervention Class for very small children and their parents with a strong focus on developing children's social, sensory, communication, language and coordination skills. Our flagship project, the Montessori Moles after-school nurture group for children ages 4-11 years, often operating at capacity, helping children who are struggling to access their education at primary school because of difficulties associated with autism, such as sensory issues, social, communication and physical difficulties, anxiety, low self-esteem and poor self-regulation which often leads to behavioural problems.

We now have the following groups running each week during term time:

- Baby Montessori (children aged up to 12-15 months);
- Toddler Montessori (children aged from 15–36 months: 2 weekly groups);
- Montessori Inclusive School (children aged from 2-9 years: 3 weekly groups);
- Montessori Moles: After-School Nurture Group (aged 4-12 years: 1 weekly group);
- Forest School / Wellbeing Sessions (two weekly groups);
- After School Montessori Enrichment Group (aged 4-12 years: This group is temporarily suspended).

We are hugely indebted to the number of volunteers and interns who have supported our activities this year; we have a continuing stream of interest and enquiries about this aspect of our work. We are grateful also to the young people from overseas who have spent time with us in spite of the cumbersome procedure of obtaining the necessary visas.

By 31<sup>st</sup> December 2021 we had completed 22 cohorts of the MEfA Montessori post-graduate SEN CPD Short Course: Part 1 - A Blueprint for Observation, and as a result we have trained teachers, psychologists, social workers, early years educators, parents, a choreographer, an environmental designer, and other masters-grade students so they can apply Montessori special education methodology and philosophy to their work, thus providing other avenues for reaching out to children and adults with autism. We are also justifiably proud of our increasing professional links with mainstream organisations.

In 2021 a reduced number of children registered to our various sessions at Montessori House which was to be expected, and it seems that there will be an ongoing requirement for social distancing in the coming months, which will again limit the numbers that register with us and thus enable us to meet the restrictions.

b) Financial matters

b.1) Funding

The total income of MEfA for 2021 was £105,484 (2020 - £115,847). Expenditure amounted to £100,904 (against £104,360 in 2020). General overheads in 2021 amounted to £2,103 (2020 - £1,859). The Trustees believe that this level of overhead is acceptable for a charity of this size and includes: Subscriptions made, Insurance, Fundraising, Bank and credit card charges and Professional Fees. The increase in 2021 includes a small increase in the fee of the Examining Accountant, the first such increase since 2012.

These financial results reflect the exceptionally challenging fundraising climate faced by MEfA in 2021, but also demonstrate the responsive manner in which the trustees have been able to match the expenditure to the income available.

---

## Montessori Education for Autism

---

The trustees attach great importance and commensurate effort into raising as much of our financial needs from the activities run on a regular basis, and thereby minimise our dependence upon grants from outside donors. This policy will continue during 2022 Nevertheless, MEfA is extremely grateful to the donors listed below, and acknowledges that such donations will continue to be a vital part of our funding programme.

### b.2) Donations

During 2021, grants, donations (including in kind) and funds were received from the following:

The Julia & Hans Rausing Charitable Trust (Special Covid Fund)  
The Kelly Family Charitable Trust (Special Covid Fund)  
The Stephen Taylor Foundation  
The Bimal Family  
Royal Borough of Greenwich (Neighbourhood Growth Fund)  
Greenwich GoodGym (who were unable to visit in 2021, but whose previous work continued to enhance the MEfA environment throughout 2021)  
The Page Family  
Design for Print

MEfA is grateful to all donors, including many whose time has been freely given but are not acknowledged above.

### b.3) Expenditure

As noted elsewhere, trustees are not reimbursed in respect of their activities as trustees and no expenses have been reimbursed to trustees during the year.

In accordance with Charity Commission guidelines the accounts have been kept using the receipts and payments method. In the Financial Statements, Deposit rents paid to agents of the landlord in respect of the properties at 135 and 135A Westcombe Hill are carried forward as prepayments. Payment of certain expenses (principally Insurance) for 2022 has been made in December 2021 and is carried forward as a prepayment.

Expenditure has been tightly controlled during 2021. The one major item purchased was a 12ft by 6ft quality greenhouse constructed in wood and toughened glass, which is already transforming the range of activities within the Forest School. This project was funded for the most part by The Greenwich Neighbourhood Growth Fund, with the balance, being the earthwork and concrete base, funded by a private donation.



**Investment Review**

MEfA funds not immediately required are held on a bank deposit account. In this time of continuing negligible investment returns, the trustees consider that any extra returns that may be earned by seeking other uses for funds are outweighed by the inherent risks in taking such action.

**Plans for the future and Appreciation**

At the time of preparation of this report, the outlook for 2022 remains very unclear, in spite of the success of the Covid vaccines programme. Our Forest School continues to be developed with an eye to the longer term future. Elsewhere our plans are all focussed on ensuring the more immediate future of the charity.

The gratitude of our MEfA families that we are still there to offer them support has been gratifying. We are confident that, whatever challenges are encountered, we will continue to offer as full a range as possible of activities through 2022. MEfA, in turn, could not operate without the continuing efforts of our staff, volunteers, donors and families for which we place on record our heartfelt thanks.

This report was approved by the Trustees on XXXX XXXXXXXX 2022 and signed on their behalf by:



Wendy Fidler

Testimonials - 2020

---

The MEfA session texts and great articles gave me all the ideas and guidance on how to start my research and I will keep these treasures in a very precious place on my shelf and forever in my heart.

I have thoroughly enjoyed the MEfA course, which helped me not only gain more knowledge on different special educational needs, but also gave me great confidence to talk about it to parents, as well as share my knowledge with my colleagues.

*A Cohort 20 student*

Dear Wendy,

Thank you very much for the programme (*for M, during Lockdown*). It is fantastic, we are implementing it well.

.....

Thank you very much for all your help, support and reassurance, having you in our lives is a great privilege!

*M's Mum (June 2020)*

Dear Wendy,

I just wanted to send you, Rathi and the rest of your team a huge thank you for your support and tutelage since September. We really appreciate the time you have spent planning the session and personalising the activities for R. I think this has made an enormous difference and helped F to make some progress this term.

Thank you also for making J (*sibling*) so welcome.

Moreover, even in these uncertain waters, MEfA has always remained a steady and constant vessel. Your commitment and bravery is incredibly admirable and we have been very grateful for this.

*L - a Mum (December 2020)*

"I have such fond memories of your Montessori preschool at Mycenae House. I remember you introduced me to the concept of children working hard through observation, that they are constantly learning even when they don't appear to be actively engaged."

*The Mum of a former toddler pupil reaching his 11th birthday.*

I discovered Montessori's Method, fell in love with it and qualified as a Montessori teacher. After that I did a post grad diploma with Montessori Education for Autism. What I learnt gave me the confidence to dismantle the various methods, choose what I needed, and re-build them into my own version. . . ( Thank you Wendy Fidler)

*Chi Boakye (SEN Training, Cohort 4)*

I Am currently pursuing my diploma course in SLD from India and just cannot forget the journey I had in MEFA. Thank you for the immense knowledge that you shared. As I'm doing my project I just can't stop thinking about my time in your school. Thank you so much

*Sapna U. (SEN graduate)*

Dear Wendy,

Thank you very much for the programme (*for M, during Lockdown*). It is fantastic, we are implementing it well.

. . . .

Thank you very much for all your help, support and reassurance, having you in our lives is a great privilege!

*M's Mum (June 2020)*

Dear Wendy,

I just wanted to send you, Rathi and the rest of your team a huge thank you for your support and tutelage since September. We really appreciate the time you have spent planning the session and personalising the activities for R. I think this has made an enormous difference and helped R to make some progress this term.

Thank you also for making J (*sibling*) so welcome.

Moreover, even in these uncertain waters, MEFA has always remained a steady and constant vessel. Your commitment and bravery is incredibly admirable and we have been very grateful for this.

*L - a Mum (December 2020)*

"I have such fond memories of your Montessori preschool at Mycenae House. I remember you introduced me to the concept of children working hard through observation, that they are constantly learning even when they don't appear to be actively engaged."

*The Mum of a former toddler pupil reaching his 11th birthday.*

I discovered Montessori's Method, fell in love with it and qualified as a Montessori teacher. After that I did a post grad diploma with Montessori Education for Autism. What I learnt gave me the confidence to dismantle the various methods, choose what I needed, and re-build them into my own version. . . ( Thank you Wendy Fidler)

*Chi Boakye (SEN Training, Cohort 4)*

**MONTESSORI EDUCATION FOR AUTISM**

England & Wales - Charity number 1136552

---

# Accounts

---

Charity Number 1136552

---

## **Montessori Education for Autism**

---

Report of the Trustees  
and  
Independently Examined Financial Statements  
for the year ended 31 December 2020

---

**Montessori Education for Autism**

---

**Contents**

---

	Page
Trustees of the Charity	1
Reference and administrative details of the charity	1
Statement of Financial Activities	2
Balance Sheet	3
Notes to the Financial Statements	4 - 5
Accounting Policies	6
Report of the Independent Examiner	7
Report of the Trustees	8 - 12
Testimonials	13

---

**Montessori Education for Autism**

---

**Trustees of the Charity**

---

Wendy Fidler	**	<i>Chair, Academic Director</i>
Roger Patenall	**	<i>Treasurer</i>
Shalini Modi	**	
Ashok Kumar		
Rachel Spooner		
David Stott		
Delphine Marcillaud		
Katalin Lovassy		<i>appointed 1st July, 2020</i>
Michelle Collings		<i>resigned 6th July, 2020</i>

\*\* *Members of the Executive Committee*

---

**Reference and administrative details of the charity**

---

Charity Registered Number 1136552

**Registered Office**

Montessori House, 135 Westcombe Hill, Blackheath, London, SE3 7DP

**Bankers**

CAF Bank Ltd

**Insurance Brokers**

Northern Counties Insurance LLP

---

**Montessori Education for Autism**

---

**Statement of Financial Activities**for the year ended 31 December 2020

---

		<b>Restricted Funds 2020 £</b>	<b>Unrestricted Funds 2020 £</b>	<b>Total Funds 2020 £</b>	<i>Total funds 2019 £</i>
	Note				
<b>Incoming resources</b>					
Voluntary income	1	14,000	66,077	80,077	87,548
Activities	2		35,748	35,748	29,046
Investment Income	3		22	22	14
<b>Total Incoming Resources</b>		<u>14,000</u>	<u>101,847</u>	<u>115,847</u>	<u>116,608</u>
<b>Resources Expended</b>					
Charitable activities	4	5,450	98,510	103,960	115,214
Governance costs	5		400	400	400
<b>Total resources expended</b>		<u>5,450</u>	<u>98,910</u>	<u>104,360</u>	<u>115,614</u>
<b>Movement in total funds for the year</b>		8,550	2,937	11,487	
Total funds at 1 January 2020		0	18,645	18,645	
<b>Total funds at 31 December 2020</b>		<u><u>8,550</u></u>	<u><u>21,582</u></u>	<u><u>30,132</u></u>	

---

**Montessori Education for Autism**

---

**Balance Sheet**as at 31 December 2020

---

	Note	£	2020 £	£	2019 £
<b>Current Assets</b>					
Petty Cash Floats		254		75	
Debtors	7	3,833		4,659	
Total at Bank		26,045		15,471	
			<u>30,132</u>	<u>20,205</u>	
<b>Creditors</b>					
Due within one year	8	-		1,560	
			<u>30,132</u>	<u>18,645</u>	
			<u><b>30,132</b></u>	<u><b>18,645</b></u>	
<b>Charity Funds</b>					
Unrestricted Funds	9		21,582		18,645
Restricted Funds	9		8,550		-
			<u><b>30,132</b></u>	<u><b>18,645</b></u>	

The notes and policies on pages 4 to 6 form part of these Financial Statements

The Financial Statements were approved by the Trustees on 8th January, 2021  
and signed on their behalf by:



Roger Patenall FCA

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements**

for the year ended 31 December 2020

---

	<b>Restricted Funds 2020 £</b>	<b>Unrestricted Funds 2020 £</b>	<b>Total Funds 2020 £</b>	<i>Total Funds 2019 £</i>
<b>1 Voluntary Income</b>				
Donations	14,000	51,232	65,232	70,361
Gift Aid		14,845	14,845	17,187
	<u>14,000</u>	<u>66,077</u>	<u>80,077</u>	<u>87,548</u>
<b>2 Income from Activities</b>				
Registrations	-	400	400	510
Donations to Nurture Groups	-	29,385	29,385	16,633
Donations for SEN & Walden Training	-	5,730	5,730	8,702
MEfA Conferences & Events	-	-	-	2,139
Other fundraising	-	233	233	1,062
	<u>-</u>	<u>35,748</u>	<u>35,748</u>	<u>29,046</u>
<b>3 Investment Income</b>				
Bank Interest		22	22	14
<b>4 Expenditure on Charitable Activity</b>				
Summary by Fund Type:				
General Overheads		1,859	1,859	2,941
Administration costs		9,678	9,678	10,462
Nurture Groups		85,021	85,021	90,652
SEN & Waldon Training		7,802	7,802	10,059
MEfA Conferences & Events		-	-	1,500
	<u>-</u>	<u>104,360</u>	<u>104,360</u>	<u>115,614</u>
Summary by expenditure type:				
Overheads and Admin			11,537	13,403
Nurture Groups			85,021	90,652
SEN & Walden Training			7,802	10,059
MEfA Conference & Events			-	1,500
			<u>104,360</u>	<u>115,614</u>

---

**Montessori Education for Autism**

---

**Notes to the Financial Statements, continued**

---

	<b>2020</b>	<b>2019</b>		
	<b>£</b>	<b>£</b>		
<b>5 Employee</b>				
In 2020 there was one employee (2019 - one) involved in the provision of charitable activity				
There were no employees whose annual remuneration was £60,000 or more.				
<b>6 Governance Costs</b>				
Accountancy Costs	400	400		
Legal Fees re lease extension	-	-		
Meeting Expenses	-	-		
Bank charges	-	-		
Postage	-	-		
	<u>400</u>	<u>400</u>		
<b>7 Net Income</b>				
This is stated after charging Accountancy Fees	400	400		
During the year, no Trustee received any remuneration for acting as a Trustee (2019 - nil)				
During the year, no Trustee received any benefits in kind (2019 - nil)				
During the year, no Trustee received any reimbursement of expenses (2019 - nil)				
<b>8 Debtors</b>				
Trade debtors, due within one year	2,750	2,750		
Donation Pledged	-	1,909		
Sundry Debtors	1,083	-		
<b>9 Creditors</b>				
Expense accrued, due within one year		1,560		
<b>## Statement of funds</b>	Brought Forward	Incoming Resources	Resources Expended	Carried Forward
	£	£	£	£
Unrestricted funds	18,645	101,847	98,910	21,582
Restricted funds	0	14,000	5,450	8,550
	<u>18,645</u>	<u>115,847</u>	<u>104,360</u>	<u>30,132</u>

**Accounting Policies**

---

**1. Basis of preparation of the Financial Statements**

The Financial Statements have been prepared using the historical cost convention and in accordance with the Financial Reporting Standard for Smaller Entities. The Financial Statements have been prepared in accordance with the Statement of Recommended Practice - "Accounting and Reporting by Charities" and with applicable accounting standards.

The books of account are kept on a Receipts and Payments basis in accordance with Charity Commission advice for a charity of this size. The Financial Statements have been prepared making adjustments to reflect timing differences between the receipt and payment of monies and the year in which the activity takes place.

Payments of deposits to landlords in respect of rent obligations have been carried forward as debtors.

**2. Fund Accounting**

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for specific purposes.

Restricted funds are funds which are to be used in accordance with the specific restrictions imposed by donors and which have been raised by the charity for particular purposes.

**3. Incoming Resources**

All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with accuracy.

Gifts in Kind donated to the charity are included at valuation (subject to de minimis) and recognised as income at the time of receipt.

No amounts are included in the Financial Statements for services donated by volunteers. Donated services or facilities are included in income (subject to de minimis) at a valuation which is an estimate of the financial cost borne by the donor where such cost is quantifiable and measureable.

Income Tax recoverable in relation to donations received under Gift Aid is recognised at the time funds are received from HMRC.

**4 Resource expended**

All expenditure is accounted for at the time the funds are expended, except where detailed in note 1 above. Where costs cannot be directly attributed to one particular activity they have been allocated, so far as is practicable, on a basis consistent with the use of the resources.

Governance costs are those incurred in connection with the administration of the charity and in compliance with constitutional and statutory requirements.

**Report of the Independent Examiner to the trustees of Montessori Education for Autism for the year ended 31 December 2020.**

---

**Respective Responsibilities of the trustees and of the Examiner.**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required under section 144 of the Charities Act 2011 (the Act) and that an independent examination is needed.

It is my responsibility to:

- (1) examine the accounts under section 145 of the Act;
- (2) follow the procedures laid down in the General Directions given by the Charity Commission (under section 145(5)(b) of the Act), and
- (3) state whether particular matters have come to my attention.


**Basis of Independent Examiner's statement.**

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

**Independent Examiner's statement.**

In connection with my examination, no matter has come to my attention which gives me reasonable cause to believe that, in any material respect, the requirements to:

keep accounting records in accordance with section 130 of the Act and to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Act, have not been met, and furthermore, there are no matters to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

  
M. Polak  
London.

26<sup>th</sup> March, 2021

## **Report of the Trustees for the year ended 31 December 2020.**

---

The trustees present their Annual Report together with the Financial Statements of Montessori Education for Autism ('the charity' also 'MEfA') for the year ended 31 December 2020. The trustees confirm that the Annual Report and Financial Statements of the charity comply with current statutory requirements, the requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities".

### **Covid 19**

Any report on 2020 has to start with a review of the impact on MEfA of covid 19, and of the charity's response.

With much sadness we closed all classes during the morning of Tuesday March 17<sup>th</sup>, anticipating by four days the government announcement of the closure of all educational establishments. No formal activities took place until classes recommenced on September 8<sup>th</sup>. The impact on the charity, its people and its finances appeared potentially devastating.

In addition to the closure of classes, we also cancelled our conferences planned for June and October and the SEN Part 2 training planned for September. An Autumn Waldon training weekend took place in November on a restricted and socially distanced format principally to assist students who needed the accreditation. Our budgets had been based on all these events making a positive contribution to our finances. In addition, we cancelled the Summer Party for our families and the Christmas meal in December. These two events, whilst being revenue 'neutral', are seen as important elements in bringing the MEfA family together.

MEfA attendance at the November Montessori Retreat in Holland, and the Montessori Europe autumn conference also suffered. All the costs of these two events are matched by private donations so that there is no cost to the charity. However, there resulted a significant loss of the Gift Aid that would have arisen on the donations.

Nevertheless, the resilience of our people and of our financial model saw us through this difficult period. We were pleased to be the recipient of special covid related grants which we acknowledge elsewhere in our list of donors. It should also be emphasised that MEfA could not have survived without taking full advantage of the government furlough scheme.

During the second half of the Summer, MEfA did invite families to make use of the Forest School – one family per day – without charge, and we were delighted that families taking up this offer included several who did not themselves have access to a secure outdoor area where children could play, work and explore whilst expending their excess energy. We were proud to welcome them back to MEfA and it was pleasing that all the expense and work creating the outdoor Forest School over the last two years was being appreciated.

MEfA has been pleased to welcome back many of our pre-covid families since September as well as an intake of new families, many of whom have used the period of lockdown to reassess their aspirations for their children's education. Coronavirus protocols have dictated that we can cope only with reduced numbers. This is a situation which is unlikely to improve well into the new year, placing continuing strain on our people and our finances.

This was followed by the second lockdown in November. Thanks to the resilience of the 'anti-covid' protocols put in place during the Summer, MEfA was able to continue to operate safely through November. Nevertheless, although unquantifiable, we believe that there was further adverse effect on the funds we generated during that period.

It is customary for the trustees to record their thanks elsewhere in this report to the staff, volunteers and donors for everything that they have done for MEfA and for their supportive enthusiasm during the year. However, this year, this is a more appropriate place in which to mark the exceptional, proactive and constructive input of everyone involved in MEfA, including, of course, the MEfA families. The executive managers also wish to place on record their thanks for the support and trust placed in them by their fellow trustees.

**Structure, governance and management:**

a) Organisational structure and decision making:

Trustees

All trustees give their time voluntarily and received no benefits from the charity in their role as Trustees.

The trustees consider that the Board of Trustees provides a wide spectrum of experience to MEfA. This experience covers autism, special needs education, the principles of learning devised by Dr Maria Montessori and others and also provides an insight into care and education in countries other than the United Kingdom.

b) Risk Management

The trustees are aware of their obligations and the need to provide a safe, healthy environment in which staff, volunteers, visitors and clients and their families can have confidence.

Policies are in place, and are reviewed on a regular basis, covering, inter alia, Protection of Children and Vulnerable People; Health and Safety, Use of Cameras and Mobile Recording Devices, Data Protection and Staff, Trustee and Visitor protocols, which include induction into the ethics, standards and procedures of MEfA.

**Objectives and Activities:**

a) Aims and Objectives

Our charity's objectives are as set out in The Objects clause of our constitution which was adopted on 28 February 2009. In summary, these are to benefit the public by advancing the education of children with autism (and conditions related to autism) through methods of learning and education developed by Dr Maria Montessori

A full report on our activities in 2020 and how we have strived to achieve these objectives appears at the section headed Achievements and Performance below and in our Covid 19 report above.

b) Public Benefit

This year, again, all of our activities have provided immediate and visible benefit to those with special needs (principally autism related), their families and their carers. MEfA aims to keep its objects under review and to continue directing its energies to those who may benefit from the expertise of its people.

**Achievements and Performance:**

a) Activity Report

All our child and parent activities, and assessments, are held at Montessori House. These groups continue their evolution from an Early Intervention Class for very small children and their parents with a strong focus on developing children's social, sensory, communication, language and coordination skills. Our flagship project, the Montessori Moles after-school nurture group for children ages 4-11 years, often operating at capacity, helping children who are struggling to access their education at primary school because of difficulties associated with autism, such as sensory issues, social, communication and physical difficulties, anxiety, low self-esteem and poor self-regulation which often leads to behavioural problems.

We now have the following groups running each week during term time:

- Baby Montessori (children aged up to 12-15 months);
- Toddler Montessori (children aged from 15–36 months: 2 weekly groups);
- Montessori Inclusive School (children aged from 2-9 years: 3 weekly groups);
- Montessori Moles: After-School Nurture Group (aged 4-12 years: 1 weekly group);
- Forest School / Wellbeing Sessions (two weekly groups);
- After School Montessori Enrichment Group (aged 4-12 years: 1 weekly group).

We are hugely indebted to the number of volunteers and interns who have supported our activities this year; we have a continuing stream of interest and enquiries about this aspect of our work. We are grateful also to the young people from overseas who have spent time with us in spite of the cumbersome procedure of obtaining the necessary visas.

By 31<sup>st</sup> December 2020 we had completed 20 cohorts of the MEfA Montessori post-graduate SEN CPD Short Course: Part 1 - A Blueprint for Observation, and as a result we have trained teachers, psychologists, social workers, early years educators, parents, a choreographer, an environmental designer, and other masters-grade students so they can apply Montessori special education methodology and philosophy to their work, thus providing other avenues for reaching out to children and adults with autism. We are also justifiably proud of our increasing professional links with mainstream organisations. Cohort 21 commenced on 9<sup>th</sup> January 2020.

Following the successful Waldon training weekends in prior years, one further course covering the theory and practicalities of Waldon therapy training took place in 2020, in partnership with Carol Mannion and Ann Marie Palmer, both experts in Waldon therapy training.

In 2020 a reduced number of children registered to our various sessions at Montessori House which was to be expected, and it seems that there will be an ongoing requirement for social distancing in the coming months, which will again limit the numbers that register with us and thus enable us to meet the restrictions.

b) Financial matters

b.1) Funding

The total income of MEfA for 2020 was £115,847 (2019 - £116,608). Expenditure amounted to £104,360 (against £115,614 in 2019). General overheads in 2020 amounted to £1,859 (2019 - £2,941). The Trustees believe that this level of overhead is acceptable for a charity of this size and includes: Subscriptions made, Insurance, Fundraising, Bank and credit card charges and Professional Fees. They consider the reduction against the 2019 figure to be a fair result of efforts made to control expenditure.

These financial results reflect the exceptionally challenging fundraising climate faced by MEfA in 2020, but also demonstrate the responsive manner in which the trustees have been able to match the expenditure to the income available.

---

## Montessori Education for Autism

---

The trustees attach great importance and commensurate effort into raising as much of our financial needs from the activities run on a regular basis, and thereby minimise our dependence upon grants from outside donors. This policy will continue during 2021 Nevertheless, MEfA is extremely grateful to the donors listed below, and acknowledges that such donations will continue to be a vital part of our funding programme.

### b.2) Donations

During 2020, grants, donations (including in kind) and funds were received from the following:

The Julia & Hans Rausing Charitable Trust (Special Covid Fund)  
The Kelly Family Charitable Trust (Special Covid Fund)  
The Stephen Taylor Foundation  
The Bimal Family  
Royal Borough of Greenwich (Neighbourhood Growth Fund)  
Greenwich GoodGym (who were unable to visit in 2020, but whose previous work continued to enhance the MEfA environment throughout 2020)  
The Page Family  
The Stanton Family  
Design for Print

MEfA is grateful to all donors, including many whose time has been freely given but are not acknowledged above.

### b.3) Expenditure

As noted elsewhere, trustees are not reimbursed in respect of their activities as trustees and no expenses have been reimbursed to trustees during the year.

In accordance with Charity Commission guidelines the accounts have been kept using the receipts and payments method. In the Financial Statements, Deposit rents paid to agents of the landlord in respect of the properties at 135 and 135A Westcombe Hill are carried forward as prepayments. Payment of certain expenses (principally Insurance) for 2021 has been made in December and is carried forward as a prepayment.

## **Investment Review**

MEfA funds not immediately required are held on a bank deposit account. In this time of continuing negligible investment returns, the trustees consider that any extra returns that may be earned by seeking other uses for funds are outweighed by the inherent risks in taking such action.

## **Phyllis Wallbank MBE**

Phyllis Wallbank was a close associate of Maria Montessori and graciously agreed to become our Patron at the time of the founding of MEfA. In spite of failing health, Phyllis retained this position until news of her death came through at the beginning of 2020.

We are grateful for her support in our early days, and of the prestige that her association with us gave to MEfA.

**Plans for the future**

At the time of preparation of this report, the outlook for 2021 remains very unclear, in spite of the medical advances being made with Covid vaccines.

The gratitude of our MEfA families that we are still there to offer them support has been gratifying. We are confident that, whatever challenges are encountered, we will continue to offer as full a range as possible of activities through 2021.

This report was approved by the Trustees on 8th January 2021 and signed on their behalf by:

A handwritten signature in black ink that reads "Wendy Fidler". The signature is written in a cursive style with a large initial 'W'.

Wendy Fidler

Testimonials

---

Thank you for a wonderful year and for all of your interest in and concern for all of our babies! I've got so much out of this year, so thank you thank you thank you!!

*A Mum - Montessori Baby class*

- 1, M has chances to interact with his peers . . .
- 2, Mum gets to see how he interacts with peers . . .
- 3, The structured settings . . . provide M with much needed stability
- 4, M loves going to Moles. He is always excited to go . . .
- 5, Most typical after school activities are impossible for us. . . I don't know of another organisation offering what you do and it enriches our life.

*A Mum - Montessori Moles (Special Needs after school club)*

Thank you so much for your input over the last two years with A and E. They have benefitted from such a wonderful experience and learned so much.

*Another Mum*

. . . I am having a hard time putting my gratitude into words but I hope you know how much I appreciate all of your help and love over the past five years. You have changed my life and are inspiration that anything is possible . . . Thank you for all you taught me.

*A former staff member*

First of all, Happy New Year! . . . 2019 was already an amazing year and I feel thankful to life for bringing me toward you and the Montessori Community. Thank you for all you have already done . . .

*SEN post-graduate student - cohort 20, January 2020*

I would like to say what a wonderful experience G has had at MEFA. She has learnt so much. How to share, eye and hand co-ordination, to wait her turn, how to mix with other children . . .

*Another Mum*

Testimonials - 2020

---

The MEfA session texts and great articles gave me all the ideas and guidance on how to start my research and I will keep these treasures in a very precious place on my shelf and forever in my heart.

I have thoroughly enjoyed the MEfA course, which helped me not only gain more knowledge on different special educational needs, but also gave me great confidence to talk about it to parents, as well as share my knowledge with my colleagues.

*A Cohort 20 student*

Dear Wendy,

Thank you very much for the programme (*for M, during Lockdown*). It is fantastic, we are implementing it well.

. . . .

Thank you very much for all your help, support and reassurance, having you in our lives is a great privilege!

*M's Mum (June 2020)*

Dear Wendy,

I just wanted to send you, Rathi and the rest of your team a huge thank you for your support and tutelage since September. We really appreciate the time you have spent planning the session and personalising the activities for R. I think this has made an enormous difference and helped F to make some progress this term.

Thank you also for making J (*sibling*) so welcome.

Moreover, even in these uncertain waters, MEfA has always remained a steady and constant vessel. Your commitment and bravery is incredibly admirable and we have been very grateful for this.

*L - a Mum (December 2020)*

"I have such fond memories of your Montessori preschool at Mycenae House. I remember you introduced me to the concept of children working hard through observation, that they are constantly learning even when they don't appear to be actively engaged."

*The Mum of a former toddler pupil reaching his 11th birthday.*

I discovered Montessori's Method, fell in love with it and qualified as a Montessori teacher. After that I did a post grad diploma with Montessori Education for Autism. What I learnt gave me the confidence to dismantle the various methods, choose what I needed, and re-build them into my own version. . . ( Thank you Wendy Fidler)

*Chi Boakye (SEN Training, Cohort 4)*