

APPLICATION FORM NOTES

DECLARATION

Bursaries are subject to certain conditions (over page), and a parent's/guardian's acceptance of the bursary is taken as acceptance of these conditions.

Parents are reminded that if false information is knowingly or recklessly provided, Mti Wa Tembo Ltd. reserves the right to withdraw the bursary award and seek to recover any benefits received under the award.

PARENTS or GUARDIANS

The persons about whom details should be given on the form are as follows:

- The natural father and mother of the child; or
- The parent with whom the child resides (and any partner/spouse of the parent if said partner/spouse resides with the parent and the child); or
- The child's legal guardian (and any partner/spouse of the guardian if said partner/spouse resides with the guardian and the child).

Where parents are separated/divorced, the parents of the child are expected to make a joint application wherever possible. Separate forms can be issued on request by reason of confidentiality.

For divorced/separated parents, please state any financial agreements relating to alimony/child-care contributions/maintenance under the 'maintenance/alimony' fields of the income tables in section 2 of the application form. If no such agreements exist or no financial contribution is made by the second parent, or if the second parent is deceased or estranged, please declare this in section 5 of the application form.

FINANCIAL CIRCUMSTANCES AND CAPITAL STATEMENT

Income, expenditure, and capital valuations should be as accurate as possible at the date the form is signed.

As a general principle, gross income before tax should be declared.

Income from all sources should be included (including income arising outside Kenya).

No deductions should be made in respect of allowances for tax purposes (taxes should be declared in the separate section).

VERIFICATION

Providing evidence (and the type of evidence provided) for income, capital, expenditure and liability is at the applicant(s) discretion, but applicants should note that the more evidence that can be provided, the stronger the application.

Relevant evidence can be in the form of (but not limited to):

Income/capital: payslips (3 months); previous year's KRA return; loan agreements; pension scheme statements; audited business accounts for businesses of which applicants are a director; documentation of trust income; dividend certificates; rental agreements with tenants; investments statements; recent valuation of principal owned property; recent valuation of other owned properties; bank statements (3 months); anything else deemed relevant.

Expenditure/liability: Mortgage statement; rental agreement with land lord; credit card statements; loan statements; anything else deemed relevant.

During any application or renewal, the organisation may also check publicly available information as part of any assessment or verification process.

Bursary Terms and Conditions

1. Grant of Bursary.

A bursary is granted at the sole discretion of Mti Wa Tembo Ltd.

2. Annual Review.

All bursaries may be subject to annual review and parent(s)/guardian(s) may each year be required to complete a financial means questionnaire. After any annual review, the directors reserve the right to vary the value of the bursary with immediate effect and will confirm the new value in writing to the parents.

3. Obligations of the Pupil.

Any pupil who is in receipt of a bursary is expected to work hard, contribute positively to the life of the school and set a good example to other pupils. The pupil must adhere to the organisation's required standards of conduct and progress.

4. Obligations of the Parent(s)/guardian/s.

The parent(s)/guardian(s) are required to support and encourage the pupil, treat members of the school community reasonably, and comply with the school standard terms and conditions.

5. Withdrawal of the Bursary.

The bursary may be withdrawn by written notice sent to a parent/guardian if, in the opinion of the directors acting in good faith, the pupil or a parent/guardian has not complied with the obligations set out in paragraphs 2, 3 and 4 above or otherwise the pupil has fallen below the required standard of conduct and progress and, in the further opinion of the directors, there has been no significant improvement following consultation with a parent/guardian and/or the pupil. Withdrawal of the bursary shall take effect from the start of the following term.

Further, the bursary may be withdrawn by written notice if the balance of the account remains unpaid 30 days after a written reminder has been sent to the parents.

6. Repayment of the Bursary.

Parent(s)/guardian(s) may be required to repay all or part of the bursary if it is found that parents/guardians have knowingly or recklessly provided false or inaccurate information about their financial position.

7. Conditions of the Bursary.

These conditions take precedence over any of the school's standard terms and conditions which are inconsistent with them but in all other respects the school's Terms and Conditions- as amended from time to time- shall apply and these bursary conditions shall be interpreted with them.

8. General

- a) The Directors of Mti Wa Tembo Ltd/Chipukizi are committed to broadening access by offering to eligible parent(s)/guardian(s) means-tested financial support with the

payment of baseline school fees. Such support is known as a bursary and bursaries may be awarded in the form of a discount on baseline fees payable, depending on the financial, compassionate, or other pertinent circumstances of applicants.

- b) Bursary awards are subject to repeat testing of parent(s)/guardian(s) means each year and may be varied upwards or downwards, depending on circumstances and the financial information provided.
- c) Requests for financial support usually fall into two categories:
 - a. New applicants to the school, where a place is available but parent(s)/guardian(s) are unable to fund the baseline fees.
 - b. Existing pupils where a change in parent(s)/guardian(s) circumstances has resulted in difficulty in meeting baseline fees and may result in the child being withdrawn part way through a stage of education.

9. The Process

a. Step One

Parent(s)/guardian(s) seeking a bursary are required to complete the application form which seeks to establish the financial circumstances of the household. This *confidential* form, which requests details of income and capital, should be accompanied by as much documentary evidence as possible.

b. Step Two

The school assesses all applications in order to establish the likely level of support which will be required in order to allow the child to attend/continue attending the school.

c. Step Three

The parent(s)/guardian(s) are advised whether their child is to be offered a bursary contribution to baseline fees and at what percentage.

d. Step Four

Parent(s)/guardian(s) are then required to sign a letter accepting the bursary and agreeing to any conditions relating to the same.

10. The Case for Assistance.

Directors will consider several factors when making the judgement as to the justification for support and the extent of such support:

a. Pupil's Suitability.

Bursary funds are limited and those judged as likely to gain most from the educational provision will be given priority.

b. Financial Limitations.

The amount of the bursary award is influenced by the extent of need. Each case is assessed on its own merits and awards are made accordingly, subject to the school's ability to fund these within the context of what is viable based on the school's bursary fund budget/donations. It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal. However, the school has a duty to ensure that all bursary grants are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include (but are not limited to):

- i. The ability to improve the financial position or earning power of the family: for example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or any other dependents, or the requirements of their partner's work.
- ii. Opportunities to release any capital: significant capital savings and investments would be expected to be used for the payment of school fees.

11. Confidentiality.

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

12. Agreement.

In completing the bursary application form, you understand and agree to everything outlined in this document.