



# **MACHAKOS UNIVERSITY**

## **BENEVOLENT FUND POLICY**

**JANUARY, 2019**

A handwritten signature in blue ink, consisting of several overlapping loops and lines, positioned to the right of the date.



## **VISION STATEMENT**

A preferred University of Excellence in Scholarship and  
Service delivery

## **MISSION STATEMENT**

Provide scholarly education through Training, Research and  
Innovation for Industrial and socio-economic transformation  
of our communities

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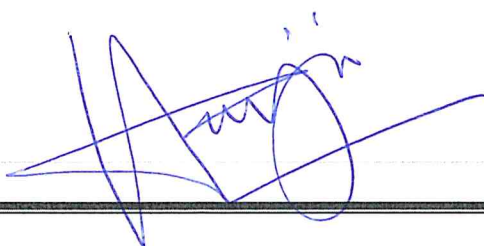
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**FOREWORD**

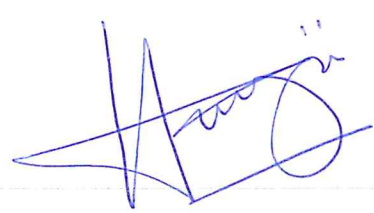
Machakos University recognizes its staff as the most valuable resource and that their welfare is essential in achieving the University Vision and Mission. The University is therefore committed to providing a conducive working environment which enables all the staff to develop their full potential. However, staff welfare is a joint responsibility and members of staff are expected to contribute and participate effectively. This policy therefore gives the guidelines on the benefits of the Machakos University Benevolent Fund to all its staff members.

Members of staff, being the most important resource in the University, are crucial to the University success. In order for the University staff to work effectively, they need to have supportive environment. This is on recognition that staff whose individual needs are met feel valued and appreciated and will be more productive in the execution of their duties. The Benevolent Fund shall therefore be a major contributor to staff wellbeing and support at such critical time of need during demise in service or loss of dependants. This policy is expected to reduce the burden on the staff or the dependants but assisting on the financial needs that are associated with the loss of life.

The University therefore looks forward towards supporting the implementation of this policy thus enhancing the staff welfare.

Sign: \_\_\_\_\_ Date: 8/2/19

**PROF. LUCY W. IRUNGU, Ph.D.**  
**VICE CHANCELLOR**  
**&**  
**PROFESSOR OF ENTOMOLOGY**



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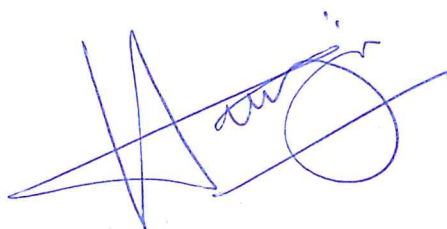
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## ABBREVIATIONS

AGM	~	Annual General Meeting
AP	~	Administration and Planning
BF	~	Benevolent Fund
BFC	~	Benevolent Fund Committee
BFP	~	Benevolent Fund Policy
CBA	~	Collective Bargain Agreement
DVC (APF)	~	Deputy Vice Chancellor (Administration, Planning and Finance)
DVC (ASA)	~	Deputy Vice Chancellor (Academic and Student Affairs)
GoK	~	Government of Kenya
HOS	~	Head of Section
MksU	~	Machakos University
SWP	~	Staff Welfare Policy
VC	~	Vice Chancellor



## 1.0 INTRODUCTION

This policy provides a guide to assist staff in understanding the operations of the Benevolent Fund (BF). The wellbeing and satisfaction of staff members is very important to the development of the of the University. Thus the University continues to put in place policies and structures that ensure conducive working environment. This policy is meant to complement the Staff Welfare Policy (SWP) basically detailing the operations and benefits of the fund. As such, it should be read *mutatis mutandis* with the Staff Welfare Policy and the Collective Bargain Agreements made with the three Unions in the University. In addition to overall University policies, specific instructions and operational guidelines may be issued from time to time by the Benevolent Fund Committee.

All members of staff are encouraged to familiarize themselves with policy and its practices. If the policy leaves one with unanswered questions, then they can contact the Chairman of the Benevolent Fund Committee (BFC) who is also the Deputy Vice-Chancellor (Administration Planning and Finance) for more clarification. This policy is however not a contract of employment document.

Machakos University has developed this policy to streamline one of the welfare activities of all staff within the University. The university is therefore guided by its mission, vision and core values when drafting and implementing the same.

## VISION STATEMENT

A preferred University of Excellence in Scholarship and Service delivery

## MISSION STATEMENT

Provide scholarly education through Training, Research and Innovation for Industrial and socio-economic transformation of our communities

## Core values

- Integrity
- Professionalism
- Creativity
- Teamwork and
- inclusivity

## 2.0 OBJECTIVES AND JUSTIFICATION OF THE POLICY

### 2.1 Objective of the Fund

The objectives of the fund are to;



- 1) Establish a written process for the evaluation of requests for assistance from the Benevolent Fund.
- 2) Outline eligibility requirements and criteria for receiving assistance from the Benevolent Fund.
- 3) Describe the processes involved in the request, approval and disbursement of monies from the Benevolent Fund.
- 4) Specifically set forth the responsibilities of the Benevolence Fund Committee and the guidelines for discharging its responsibilities.

## **2.2 Purpose of the Benevolent Fund**

The Benevolence Fund is a self-contributory fund for all MksU staff made available to them on application for the sole purpose of assisting them when they are bereaved. Its receipts consist primarily of contributions from MksU staff members and its expenses consist of funds disbursed for its intended purposes at the direction of the Benevolent Fund Committee.

## **3.0 BENEVOLENCE FUND COMMITTEE**

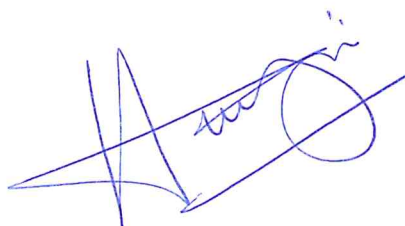
The Benevolent Fund Committee shall be appointed by the Vice Chancellor and shall consist of nine (9) member with the DVC/APF as the Chairman, Registrar (AP) as the Secretary, Human Resource Manager, one Union leader from each the three Unions and one elected representative from each of the three Unions. The elected representatives shall serve for a period of five (5) year or be replaced when they leave the University. Each member of the Committee must sign a “Confidentiality” Agreement. The Committee shall meet on need basis and at least once each quarter for their formal meetings.

## **4.0 SOURCE OF INCOME FOR THE FUND**

All MksU staff on permanent, permanent and pensionable, and contract shall make a compulsory monthly contribution of **KSh400** to the fund for the sole purpose of catering for funeral expenses for staff, spouse and dependants as may be agreed on by the staff members in an annual meeting. Contribution to the fund shall be through check off system to an account dedicated to the fund and managed by the Benevolent Fund Committee. Each member shall be required to fill a declaration form which shall be used to guide on contributions and payment of benefits.

## **5.0 ELIGIBILITY**

All members of staff who contribute to the fund shall qualify to receive assistance from the Benevolence Fund on need basis from the date of joining the fund. A member shall however lose their eligibility as soon as the exit from the University. Where parents/spouses/dependants are shared, such benefits shall be covered only once.





## 6.0 GENERAL GUIDELINES

- 1) Members who get bereaved shall make a request for financial support to the Chairman of BFC. In the case where the member of staff is the victim, then the request can be made by their dependants or initiated by the Head of Section.
- 2) To ensure sustainability of the fund, at least 50% of members' contributions per year shall be invested in money markets by the BFC or as approved by members in an annual meeting.
- 3) When a member exits the University after having been a member of the fund for atleast 10 years without having benefited, then such a member shall be entitled to a single benefit.

### 6.1 Operation of the Fund

The following procedures shall be followed when operating the fund.

- 1) All deductions from members shall be remitted to an account opened by the Committee in the name of Machakos University Benevolent Fund.
- 2) The fund shall invest 50% of the collected funds annually in money markets to generated interest.
- 3) A member who exits the University after making contributions to the fund without any benefit will eligible for a 20% refund of the total funds contributed.
- 4) Immediately bereavement of a member/spouse/dependant occurs, the Head of section sends a memo to the DVC/APF informing him/her on the occurrence.
- 5) The member/spouse/dependant or HOS shall make an application to the Chairman (BFC) within the shortest time possible for support from the BF using a prescribed form. A copy of the death certificate/Burial Permit MUST be attached.
- 6) On receiving the application, the Chairman of the BFC shall make an administrative decision or call for a committee meeting depending on the urgency of the need. The Chairman may request for additional information if need be.
- 7) A member shall benefit from the fund per the occurrence but not on the number of applications. However, where the staff members share the bereavement, only one member shall benefit.
- 8) The applicant will be informed of the status of his/her application no later than five (5) business days from the receipt of the application.



- 9) The benefit to the members shall be as determined by the members in the annual meeting and shall be the same for all the members and their dependants. The initial benefit shall be **KSh80,000** per occurrence.
- 10) All disbursements from the Benevolence Fund shall be made directly to the beneficiary through direct Bank transfer or by cheque.

## 6.2 Annual General Meetings.

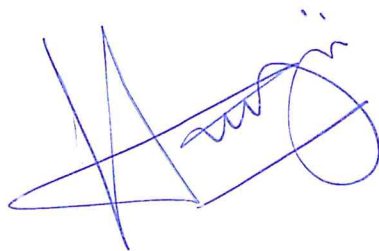
There shall be an Annual General Meeting which shall be held in the month of December each year and shall be attended by all the members and a quorum shall be 50% plus one. The agenda of any Annual General Meeting shall include but not be limited to;

- 1) Confirmation of the minutes of the previous Annual General Meeting.
- 2) Presentation of the Financial Status of the Fund.
- 3) Elections of Associate BFC member when due.
- 4) Such other matters as the Committee may decide.
- 5) Any other business with the approval of the Chairperson.

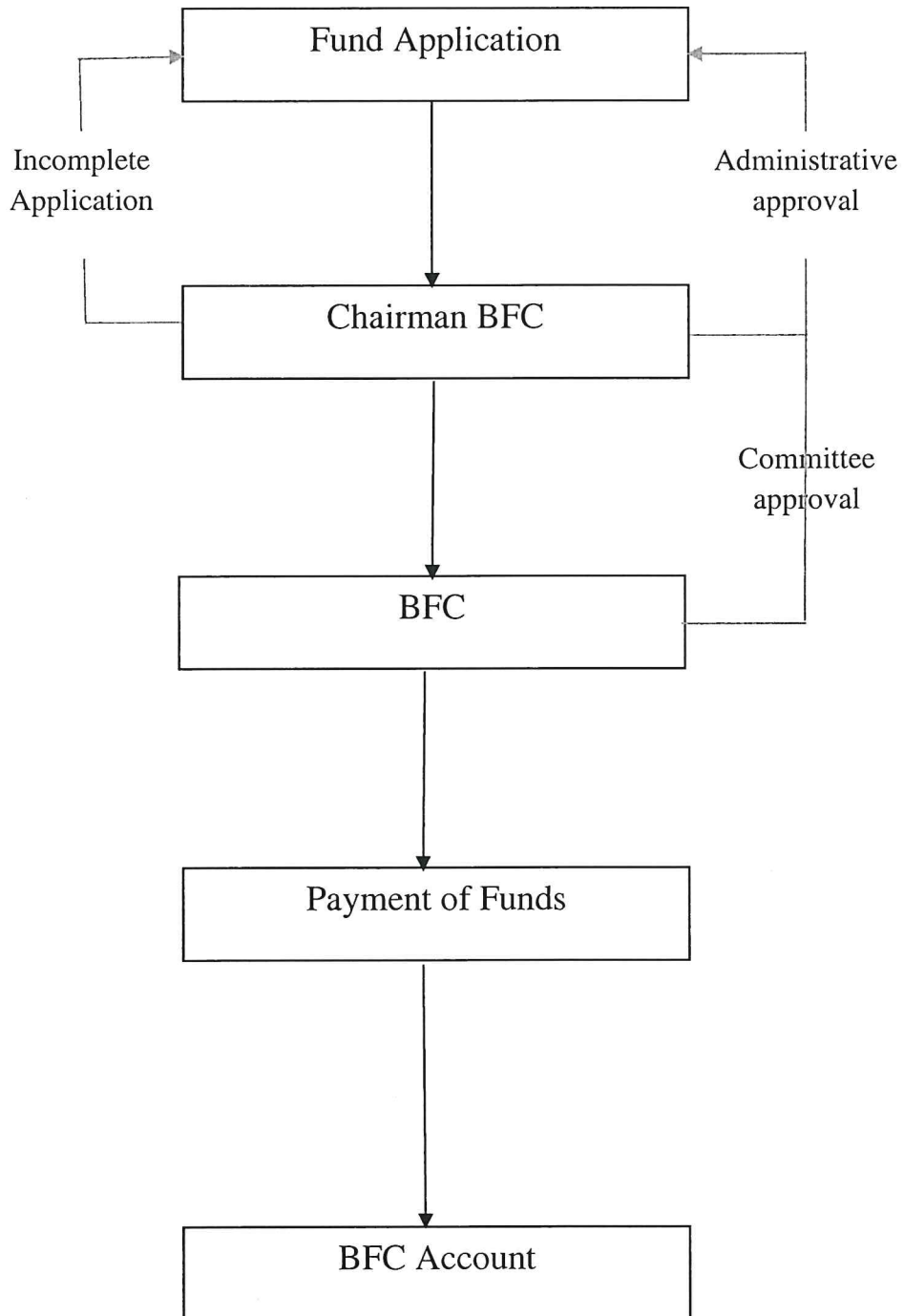
A notice in writing of such Annual General Meeting, accompanied by the Annual Statement of Account and the agenda for the meeting shall be circulated by the Secretary to all members not less than Seven (7) days before the date of the meeting.

### 6.2.1 Special General Meetings

There shall be Special General Meetings called for any specific purpose by the Chairperson and all members shall be required to attend. The Notice in writing of a Special General Meeting shall be circulated to all members not less than Three (3) days before the date thereof. The quorum shall be 33%. No matter shall be discussed at a Special General Meeting other than that stated in the Notice.



## 7.0 FUND OPERATION FLOW CHART

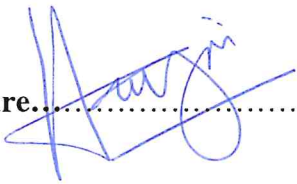


## 8.0 POLICY REVIEW

This policy shall be reviewed after every four (4) years or when need arises.

## 9.0 POLICY APPROVAL

Approved by Prof. Gideon Baki HANJARI  
CHAIRMAN, MACHAKOS UNIVERSITY COUNCIL

Signature 

Date 21st Feb 2019

