HKEX Foundation 香港交易所慈善基金

合作機構 In partnership with

HKCSS 社聯

HKEX Charity Partnership Programme 2025

香 港 交 易 所 慈 善 夥 伴 計 劃 2025

Application Guideline

申請期 Application period：

2025-06-18 - 2025-07-18 5p.m.

目錄 Table Of Contents

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1. 關於香港交易所慈善基金
About HKEX Foundation

<u>香港交易所慈善基金</u>自2020年起設立「香港交易所慈善夥伴計劃」，支持本地慈善機構推出具有影響力及創造結構性和系統性改變的社區項目。 慈善基金與香港社會服務聯會合作，以「理財教育」、「社區發展」、「人才發展」及「環境可持續發展」四大重點範疇作為基礎，惠及不同社群，應對社區及環境上的各種挑戰。

Since 2020, <u>HKEX Foundation</u> has set up the HKEX Charity Partnership Programme (the Programme) to support impactful community projects that creates structural and system changes run by local charitable institutions. In partnership with The Hong Kong Council of Social Service, the Programme aims to give back to the community based on four focus areas: Financial Literacy, Social Empowerment, Talent Development and Environmental Sustainability, serving a wide spectrum of people in need and addressing various social and environmental challenges.

香港交易所慈善基金網頁: <u>請按</u>
HKEX Foundation website (<u>Please click</u>)
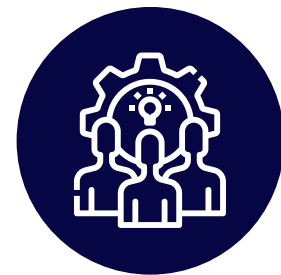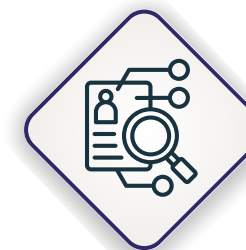
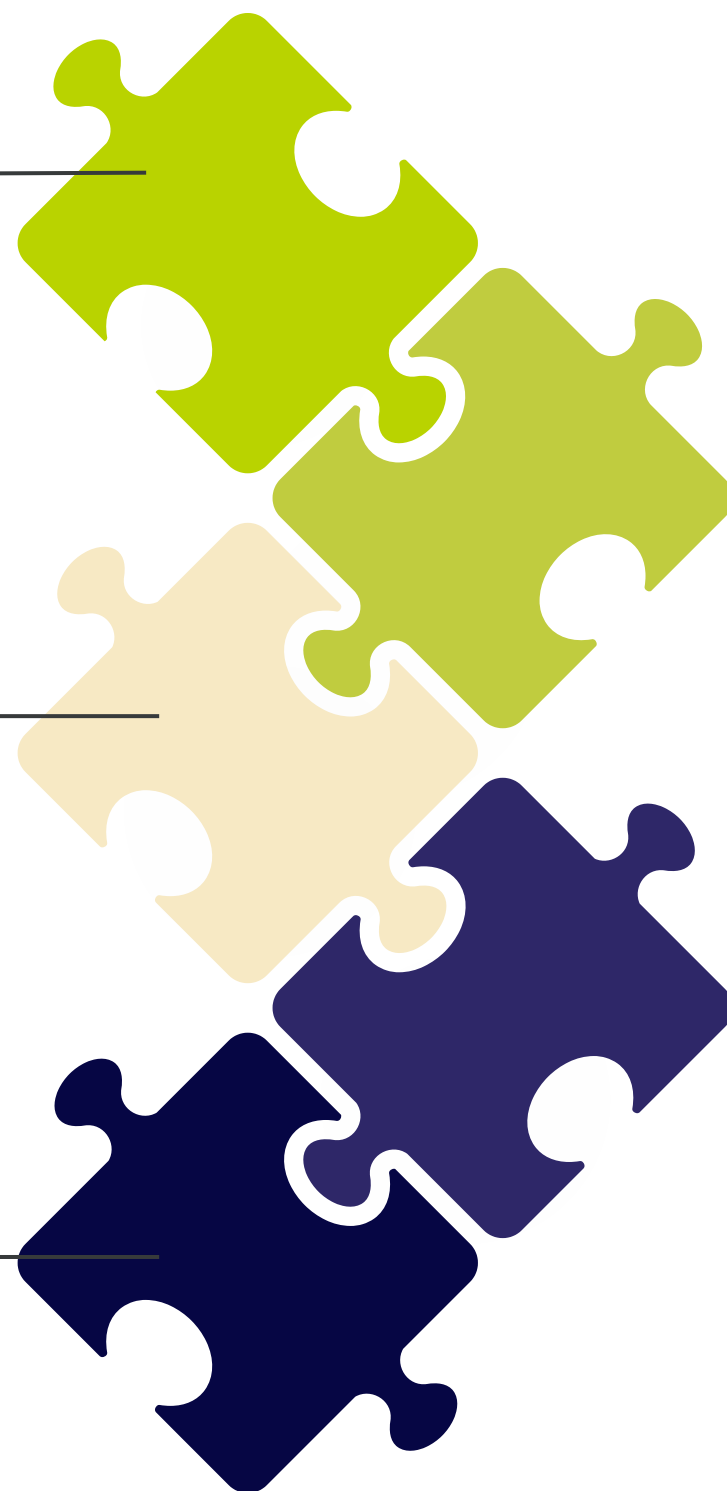# 2.社聯的角色及支援範疇
Support from HKCSS

宣傳計劃及接受申請
**Promotion and
Call for Application**

監察項目執行進度
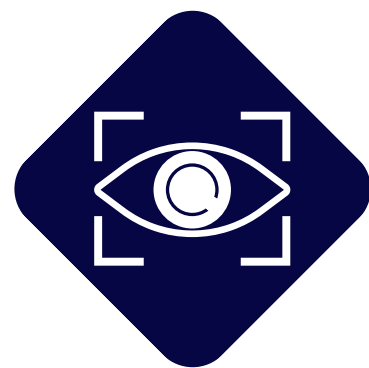**Reporting and
Monitoring**

交流與分享
**Communication and
Sharing**

篩選及審查
Screening and Vetting

發放資金予獲批之項目
**Settle payment with
project grantees**

3.資助計劃目標
Funding Objectives

支持本地慈善機構推出具有影響力的長期社區項目

Support impactful long-term community projects run by local charitable institutions

應對社區及環境上的各種挑戰

Addressing various social and environmental challenges

申請資格 Eligibility

符合下列申請資格的本地慈善機構 Local charitable institutions that are：

根據《稅務條例》(第112章)第88條註冊**至少3年**（即於2022年7月18日前獲得有關註冊）registered under Section 88 of the Inland Revenue Ordinance (Cap 112) **for at least 3 years** (since 18 July 2022).

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重點範疇
Key Focus Areas

理財教育 Financial Literacy

- Promote financial literacy for all ages, in particular for the disadvantaged
- Provide education programmes on financial management such as scam prevention and retirement planning for vulnerable groups
- Safeguard individual's right to access basic financial services and financial literacy education
- Facilitate all ages to familiarise with FinTech and other advanced financial tools
- Any other project ideas that enhance financial literacy

社區發展 Social Empowerment

- Support and help different vulnerable groups of all ages to become self-sustainable and alleviated from poverty
- Improve physical and mental wellness of disadvantaged and minority groups
- Address tangible and developmental needs of the underprivileged in an effective and sustainable manner
- Foster equality across different gender, ethnicity, abilities, socioeconomic status and other minority groups
- Enhance the inclusiveness of mainstream society and services, in perspective of diversity
- Any other project ideas that enhance social empowerment

人才發展 Talent Development

- Foster an inclusive talent culture in education, workplace and the community
- Equip different under-resourced groups with knowledge, skills, competence, values and attitudes needed to develop them as a future talent
- Upskill or reskill individuals in need to engage with the future markets and drive economic growth
- Develop future talents for sustainability related industries to create positive social & environmental impact
- Any other project ideas that enhance talent development

環境可持續發展 Environmental Sustainability

- Raise awareness about climate change and sustainability, including but not limited to environmental education programmes for all ages
- Promote and facilitate the conservation of natural habitats and biodiversity
- Support initiatives aimed at reducing carbon footprints and strengthening community resilience to the effects of climate change
- Any other project ideas that enhance environmental sustainability

重點範疇
Key Focus Areas

理財教育 Financial Literacy

- 為不同年齡層（特別是弱勢社群）提供理財教育
- 為弱勢社群提供理財管理相關的教育項目，例如防騙和退休計劃
- 保障個人享有基本金融服務和理財教育的權利
- 協助不同年齡層了解金融科技和其他先進的理財工具
- 任何其他促進理財教育的項目構思

社區發展 Social Empowerment

- 支援和幫助不同年齡層的弱勢社群實現自力更生及擺脫貧窮
- 改善弱勢社群及少數群體的身心以有效和可持續的方式滿足弱勢社群實際需求和發展需要
- 促進不同性別、種族、能力、社經地位和其他少數群體的平等
- 提升主流社會及服務對多元社群的接納度
- 任何其他推動社區發展的項目構思

人才發展 Talent Development

- 在教育、工作和社會等方面促進多元人才文化
- 為不同弱勢群體裝備知識、技巧、能力、價值觀及態度，培養成為未來的人才
- 為有需要的群體提升或再培訓個人技能，以迎接未來市場和經濟的發展
- 培養永續發展相關領域和專業的人才，以創造正面的社會和環境影響
- 任何其他促進人才發展的項目構思

環境可持續發展 Environmental Sustainability

- 提高社會對氣候變化和可持續發展的認識，包括但不限於不同年齡層的環境教育
- 推動和促進自然棲息地和生物多樣性的保育
- 支持旨在減少碳足跡和加強社區韌性的項目，應對氣候變化影響
- 任何其他推動環境可持續發展的項目構思

申請期
Application period

由 2025年6月18日（三）
至 2025年7月18日（五）下午五時

From 18 June 2025 (Wed)
to 5:00 p.m. on 18 July 2025 (Fri)

所有逾時申請將不獲受理
Late applications will not be accepted

資助規模及項目年期
Funding Amount & Duration

資助金額 （每個項目） Funding Amount (per project)

HK$500,000 - HK$5,000,000

每個項目港幣50萬至500萬

HKD 500,000 to HKD 5,000,000 each project

有關項目的中央行政費用必須少於資助總額百分之十(如適用)
Administration Fee should not exceed 10% of the total requested amount (if applicable)

項目資助期 Project duration

12/24/36個月執行期implementation + 1個月準備期 preparation

12/24/36

項目須於2025年12月1日展開，並在2026、2027或2028的11月30日完成。
Starting from 1 December 2025 and to be completed on 30 November 2026, 2027 or 2028.

時間表
Schedule

18/6/2025 - 18/7/2025, 5 pm

暫定 Tentatively 16-19/9/2025

10/2025 - 11/2025

1/12/2025 - 30/11/2026, 2027, 2028

每6個月 Every 6 months

**申請期
Application period**

所有逾時申請將**不獲受理**

Late applications will **not be accepted**

**甄選及評審面試
Selection and Interview**

受邀項目將會收到面試詳情日期、時間及地點

Shortlisted applicants will receive the details of the interview

**公佈結果
Result Announcement**

結果將透過電郵公佈

Result will be announced via email

**項目執行期
Project Period**

項目執行期可為12、24或36個月，並有額外一個月準備期

Project period can be 12 months, 24 months or 36 months, with additional 1 month as preparation period

**獲批項目提交報告
Report Submission**

獲批項目將須每6個月提交一次進度及財務報告，並於年終報告及終期報告期間，提交審計報告

Approved grantees need to submit progress report and financial report every 6 months and submit audited report during Annual report and Final report.

評審準則
Vetting Criteria

10% **與重點範疇的相關性**
Relevance with The Programme's focus areas

25% **項目的產出、成果及社會影響**
Project output, outcome and social impact

25% **項目內容及執行計劃**
Project content and planning

15% **項目的可持續發展**
Project Sustainability

15% **機構執行能力及過往紀錄**
Organisation's capability and track record

10% **創新性**
Innovativeness

Relevance with The Programme's focus areas

10%

- Aligns with the HKEX Foundation's focus area(s)

Project output, outcome and social impact

25%

- Good understanding on the root cause of the identified problem(s), need(s) of the target beneficiaries and the community/ environment
- Clear and relevant intervention model with measurable outputs, outcomes and impact that address the identified social needs
- Demonstrated potential to drive structural/systemic change by addressing underlying social and/or environmental challenges

Project content and planning

25%

- Effective operational model and/or work plan, make the best use of resources and time
- Cost effectiveness of the project
- Incorporates measures to ensure financial control and risk management in the project

Project sustainability

15%

- Project's scalability and replicability, enabling amplified impact
- Impact sustainability beyond the funding period

Organisation's capability and track record

15%

- Demonstrates commitment and capability in carrying out all the project deliverables
- Experience in executing similar projects, relevant track record and performance
- Potential for organizational development through funding support

Innovativeness

10%

- Innovative approach in addressing social and/or environmental issues
- The project is able to fit the current service gap

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與重點範疇的相關性 — 10%

- 符合香港交易所慈善基金的重點範疇

項目的可持續發展 — 15%

- 項目的可擴展性和可複製性，以擴大其社會影響
- 資助期後項目的可持續影響力

項目的產出、成果及社會影響 — 25%

- 充分瞭解所服務的社區或環境的需要、所針對的社會問題的根源及目標受益者的需求
- 清晰且相關的介入手法和可量化的產出、成果及社會影響，以回應項目針對的社會需要
- 展示透過解決潛在社會和/或環境挑戰，以及推動結構性/系統性改變的潛力

機構執行能力及過往紀錄 — 15%

- 展示能夠完成所有項目成果的投入程度和能力
- 執行類似項目的經驗、過往紀錄和表現
- 項目具有促進機構發展的潛力

項目內容及執行計劃 — 25%

- 有效的運作模式和可行的工作計劃，並能充分利用資源和時間
- 項目的成本效益
- 具備財務控制及風險管理的措施

創新性 — 10%

- 以創新的手法應對社會及環境上的各種挑戰
- 項目能夠補足現行服務的空缺

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HKEX Foundation 香港交易所慈善基金　　HKCSS 社聯
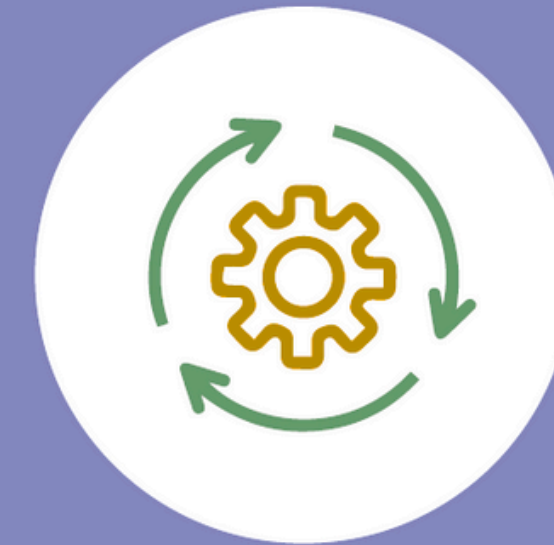
結構性和系統性改變
Structural / systemic change

Incremental Change:
Improving performance within existing rules and norms

Reform:
Revising structures, rules, and norms to make new types of actions more prevalent

Transformation:
Creating pioneering solutions and new ways of tackling problems

漸進式改變：
在現有規則和準則下改善效能

改革：
修訂結構、規則和規範，使新的行動或手法更為普及

轉型：
創造開創性的解決方案和解決問題的新方法

創造結構性和系統性改變的方法
Ways to create structural / systemic change

 # Standardization
+
 # Replicability

擴展 Scale Out

Develop credible benchmarks:
- provide motivation, guidance for everyone involved and consistency in actions across the system/sectors

Generate and spread the word:
- generate knowledge, awareness and support of specific issues / good practices to achieve widespread and long-term impact

 # Change complexity approaches/system
+
 # Impacting instititions and policy

提升 Scale Up

Develop new cases for recognition:
- prove new and effective service models that help to create buy-in or actions from relevant stakeholders, e.g. legislators or executives

Advanced institutional changes:
- change institutions at the level of policy, rules, and laws

 # Impacting cultural roots and norms
+
 # Collective vision/impact

深化 Scale Deep

Shift culture and norms:
- deep discussion of root causes, foster cultures that promote innovation and adaptability
- engage in continuous evaluation and transformative learning/study

Catalyze effective collaboratation:
- foster senses of shared responsibility and collective vision/impact, to increase active participation,
- i.e. making valuable and impactful decisions or actions

Source: 1. Smith, R. F. (2023, November 16). *Systemic change: Driving meaningful transformation.* Retrieved from https://robertsmith.com/blog/systemic-change/

2. Riddell, D., & Moore, M.-L. (2015, October). *Scaling out, scaling up, scaling deep: Advancing systemic social innovation and the learning processes to support it.* Prepared for the J.W. McConnell Family Foundation and Tamarack Institute.

創造結構性和系統性改變的方法
Ways to create structural / systemic change

標準化
+
可複製性

擴展 Scale Out

建立可靠的基準:
- 為所有參與者提供動力和指引，確保系統/各個行業的行動一致性

創造並傳播知識:
- 創造並提高對具體議題或卓越實踐方法的認知與支持，以實現廣泛且長遠的影響

#改變複雜的方法/系統
+
影響制度和政策

提升 Scale Up

建立新的受認可的案例:
- 透過證明新的且有效的服務模式，以促進相關立法或管理人士的認可或作出行動

推進制度進行改變:
- 能夠在政策、規則或法律層面等以促進制度改變

影響文化根源和規範
+
共享的願景/影響力

深化 Scale Deep

改變文化與規範:
- 深入探討根本原因，培養能夠促進創新和適應能力的文化
- 進行持續性評估和推動變革性學習/討論

推動有效協作:
- 培養共享的責任、願景/影響力，以提升集體的積極參與，驅使其共同作出有價值且具影響力的決策或行動

Source: 1. Smith, R. F. (2023, November 16). *Systemic change: Driving meaningful transformation.*
Retrieved from https://robertsmith.com/blog/systemic-change/
2. Riddell, D., & Moore, M.-L. (2015, October). *Scaling out, scaling up, scaling deep: Advancing systemic social innovation and the learning processes to support it.*
Prepared for the J.W. McConnell Family Foundation and Tamarack Institute.

網上申請程序Application Procedure

🌐 **申請系統 Application System: https://cppngo.hkcss-co-creation.org.hk/member/login.php**

EN

The Hong Kong Council of Social Service – Online Application System

HKEX Charity Partnership Programme

Application deadline: 18 Jul 2025 at 5 p.m.

系統將於**2025年6月18日（三）**
至 **2025年7月18日（五）下午五時 期間開放**
System will be available from **18 June 2025 (Wed)**
to **5:00 p.m. on 18 July 2025 (Fri)**

Login Page

Email address ✉

Password 🔒

Forgot Password

[Login]

[Account Registration (2025)]

Click here for the Guide to Online Application (HKEX Charity Partnership Programme) and Click here for FAQ

註冊帳戶Account Registration

即按「註冊帳戶」進行戶口註冊 Please click "Account Registration" to proceed for Online Registration

*曾申請的用戶請直接使用現有的帳戶進行登入
如忘記密碼，請點選「忘記密碼」功能重設
*For users who have applied in previous year before, please login using your existing account. If you forget your password, please use the "Forgot password" feature in the system

**請確保登記的電郵地址仍可正常收件
**Please ensure that the email address is still active and able to receive emails

網上申請程序Application Procedure

EN 繁

Registration

User login information

Email login

Password

Re-confirm password

Organisation Information

Name of organisation (English)

Name of organisation (Chinese) (If there is no Chinese name, please fill in the English name here)

Organisation Address (Eng)

Room, Floor & Building

Number & Street

-- District --

登入帳戶 Login Account

於「使用者登入資料」一欄填寫之電郵地址將用作註冊帳戶之登入電郵 The email address filled in the "User Login Information" column will be used as the login email for the registered account.

請確保電郵地址能有效接收郵件，建議使用機構分部/中心的電郵進行註冊，這樣您的電郵地址就不會遺失或更改 Please ensure that your email address is active to receive emails. It is recommended to use the email address of your institution's branch/center for registration, so that your login email address will not be lost or changed.

N no-reply@hkcss.org.hk
Activate your HKCSS Online Application - HKEX Charity Partnership Programme account
收件者 cppngo_hkex

You don't often get email from no-reply@hkcss.org.hk. Learn why this is important

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Dear HKCSS TEST ACCOUNT

Active your **"HKCSS Online Application System - HKEX Charity Partnership Programme"** account

Thanks for registering with HKEX Charity Partnership Programme account. Please take a moment to active your account by clicking the link.

Once your account is activated, you can click here to login and submit your application.

Log-in email address: cppngo_hkex@hkcss.org.hk

Thank you!

Best regards,
The Hong Kong Council of Social Service
Email: cppngo_hkex@hkcss.org.hk

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啟動帳戶 Account Activation

註冊後請查看登入電郵的收件箱或垃圾郵件箱，並啟動你的帳戶 Please check the mailbox/ junk mail of the registered email if there is an activation email sent by the system.

成功啟動後請返回登入頁面進行登入 After successful activation, please return to the login page to log in.

網上申請程序Application Procedure

上載證明文件 Upload Documents

登入後機構需上載證明文件，否則申請將不獲考慮
Please submit the below supporting documents, otherwise your application will not be considered.

於登入後需提交的證明文件 Submit supporting documents after login:

1. 獲稅務局批准為豁免繳稅慈善機構之信函副本 Approval letter issued by the Commissioner of Inland Revenue, under section 88 of the Inland Revenue Ordinance

2. 機構最近一年經審計的帳目或經核証的管理帳目副本 The latest audited accounts or certified management accounts of the organisation

3. 機構/組織成立證書或按相關條例註冊之文件副本 Organisation's certificate of incorporation or registration document under the relevant ordinance(s)

4. 機構管理架構圖 Organisation structure chart

5. 已簽署的聲明書 Signed declaration form

6. 有關申請的其他附加資料（如適用） Attachments or supplementary information of the project (if applicable)

*每個檔案大小上限為5MB
Size limit to 5MB per file

網上申請程序Application Procedure

董事會和執行委員會成員資料
Board members and Executive Committee members Information

機構需提交機構最高管治架構，例如董事會成員及執行委員會成員名單
Please provide details of members of highest governing body, such as Board of directors members and Executive Committee members

於「資料」一欄剔選聲明填報之機構董事會及執行委員會資料均屬正確和完備 Click the box in the "Information" column to declare that the information of Board members and Executive Committee members provided below is both complete and correct.

然後按「 新增董事會和執行委員會」開始填寫 Click "New Member" to start filling in

完成後按儲存以便保存資料 Please click "save" button to save the data

所需文件示例 Example of required documents

網上申請程序Application Procedure

申請項目 Applications

選取「新增項目」以提交新的項目計劃書
After selecting "Applications", please click "New Application" to create New Proposal

若再次登入可於「動作」選取「項目計劃」，繼續填寫
You can find your application and continue filling out the proposal by selecting "Application" under "Action"

網上申請程序Application Procedure

| 1 項目內容 | 2 項目策略及實施計劃 | 3 團隊能力及人力資源 (如適用) | 4 項目收入 (如適用) | 5 項目執行開支 (除人力資源外) | 6 項目資產購置 (如適用) | 7 總結 |

| 1 Details of Project | 2 Project Strategy and implementation plan | 3 Team Capability and human resources (If applicable) | 4 Project's sales/revenue (If applicable) | 5 Cost of Programme Implementation (Excluded human resources) | 6 Purchase of Project Assets (If applicable) | 7 Summary |

Back   **Save**

Previous Step   Next Step

申請項目 Applications

*請於填寫表格期間定期使用頁面左下角的'暫存'按鈕，以確保資料得以保存，但請避免過於頻繁儲存，以免造成數據過載。
Please regularly use the 'Save' button in the lower left corner of the page to ensure the data has been saved. However, avoid saving too frequently to prevent potential data overload.

****請避免多人同時登入或使用多個分頁填寫表格，以防止因資料同時寫入而導致內容衝突或遺失
Please avoid multiple users logging in simultaneously or filling out the form across multiple tabs to prevent data conflicts or loss due to concurrent data submission.**

整個申請過程分為七個部分，申請人需要在提交之前填寫所有步驟。第七步是總結，毋需填寫
The entire application process is divided into 7 parts. Applicant needs to fill in all fields before submitting. Step 7 is summary and not fillable.

請按網上申請表的步驟填寫計劃書
Please follow the steps in the online application form to fill in the proposal.

1	2	3	4	5	6	7
Details of Project	Project Strategy and implementation plan	Team Capability and human resources (If applicable)	Project's sales/revenue (If applicable)	Cost of Programme Implementation (Excluded human resources)	Purchase of Project Assets (If applicable)	Summary

Details of Project

Project Basic Information

Project Name (English)

> Max. 60 English

Project Name (Chinese)

> Max. 30 Chinese

Service Area(s) (Please tick, can choose more than one district)

- [ ] All districts in HK
- [ ] Central & Western
- [ ] Wan Chai
- [ ] Eastern
- [ ] Southern
- [ ] Yau Tsim Mong
- [ ] Sham Shui Po
- [ ] Kowloon City
- [ ] Wong Tai Sin
- [ ] Kwun Tong
- [ ] Kwai Tsing
- [ ] Tsuen Wan
- [ ] Tuen Mun
- [ ] Yuen Long / Tin Shui Wai
- [ ] North
- [ ] Tai Po
- [ ] Sha Tin / Ma On Shan
- [ ] Sai Kung / Tseung Kwan O
- [ ] Islands

Project Summary

> Max. 250 Chinese or 300 English

Project Duration

> 36 months

Project Launch Date

> 2025-12-01

Project End Date

> 2028-11-30

Project should launch on 1 December 2025 and the project duration should be 12 or 24 or 36 months.

Forcus Area(s) (can choose more than one item;please list the areas of your project in order)

1. Financial Literacy
2. Social Empowerment
3. Talent Development
4. Environmental Sustainability

申請項目 Applications (1)

步驟一: 項目內容
Step 1: Details of Project

請留意表內的字數限制 (建議可使用Word的功能而核對有關字數)
Please take note of the word limit specified in the form.
(Kindly consider using the word count feature in Word to verify the word count)

1	2	3	4	5	6	7
Details of Project	Project Strategy and implementation plan	Team Capability and human resources (If applicable)	Project's sales/revenue (If applicable)	Cost of Programme Implementation (Excluded human resources)	Purchase of Project Assets (If applicable)	Summary

Key Social Problem(s) to be Addressed and Intervention Model Used

1 Please describe the current social issues that this project aims to address. Explain how the intervention model used in this project effectively addresses the mentioned social issues.

Max. 350 Chinese or 400 English

Briefly describe the project's service model, which may include its theoretical framework, potential to drive broader and deeper social impact, as well as to facilitate structural and systemic changes.

Max. 400 Chinese or 450 English

Main Objective

Please outline the project goals and ensure that they align with its intervention model and social impact

1

Long-term ▾

Please select

Short-term

Long-term

Max. 250 Chinese or 300 English

Example of short-term project outcomes:
- Provide training and professional development programs for students to establish development goals and career aspirations.
- Establish partnerships between schools, youth centers, and the community.

Example of long-term social benefits:
- Promote lifelong learning and holistic development of students.
- Cultivating community self-reliance to address societal issues in the long run and achieve sustainable
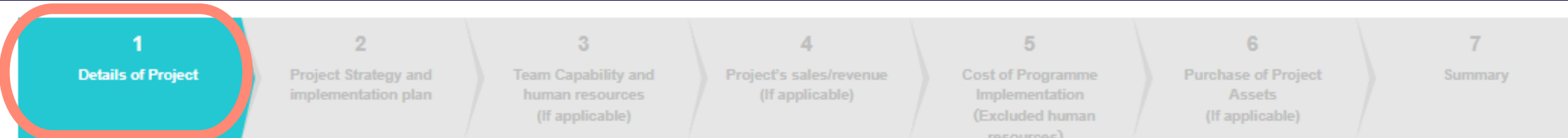
+ Add

申請項目 Applications (1)

步驟一: 項目內容
Step 1: Details of Project

請留意表內的字數限制 (建議可使用Word的功能而核對有關字數)
Please take note of the word limit specified in the form.
 (Kindly consider using the word count feature in Word to verify the word count)

*可按此新增項目
Click to add item

1	2	3	4	5	6	7
Details of Project	Project Strategy and implementation plan	Team Capability and human resources (If applicable)	Project's sales/revenue (If applicable)	Cost of Programme Implementation (Excluded human resources)	Purchase of Project Assets (If applicable)	Summary

Project Strategy and implementation plan

Detailed Strategy and Implementation Plan

Max. 800 Chinese or 1500 English

E.g.
We will recruit 40 grassroot women from 4 NGOs e.g. XXXX and women will receive a 3-week training lead by professional chef. After the training, the grassroot women will make use of the idle kitchen to prepare food and beverages which will be sold in the restaurant. We will recruit 15 grassroot young people from 2 youth centres. They will receive 2 weeks of training from our team and will be hired as part-time worker to promote the product from the grassroot women.

Targets	Primary Beneficiaries	Secondary Beneficiaries
Children & Youth	20	Number of people
Elderly	50	Number of people
Families	Number of people	Number of people
New Arrival	Number of people	Number of people
Persons with Disabilities	Number of people	Number of people
People of diverse race	Number of people	Number of people
Others, please specify	Number of people	Number of people
Others, please specify	Number of people	Number of people
Others, please specify	Number of people	Number of people

申請項目 Applications (2)

步驟二: 項目策略及實施計劃 (所有欄目必須填寫)
Step 2: Project Strategy and Implementation plan (All fields are mandatory)

*請重點列明活動實際內容及如何進行，以讓評審更清楚了解詳情 Please specify the concrete idea and implementation approach of all your programme for assessors' clear understanding

Key Milestones and Performance Indicators

Timeline	Implementation Plan	Accumulative Performance Indicator
Example	Recruit and train youth	100 youth
	Open physical store	1 shop
	Organise experiential events	40 participants
	Sell or donate products	200 products
Before project launch (1 month preparation period)		
Phase 1 (Month 1 to 6)		
Phase 2 (Month 7 to 12)		
Phase 3 (Month 13 to 18)		
Phase 4 (Month 19 to 24)		
Phase 5 (Month 25 to 30)		
Phase 6 (Month 31 to 36)		

*可按 Click **[-]** **[+]** 刪除/新增成效指標 to delete/add performance indicator

Expected Outcome and Means of Measurement

Target Beneficiaries	Number of Target Beneficiaries	Expected Outcomes and Outcome Indicators	Means/Method of Measurement
Children & Youth	20	10% enhancement on quality of life 90% of students have better self-understanding and	
Elderly	50	10% enhancement on quality of life	

Potential problems and solutions to achieve the performance indicators

Max. 100 Chinese or 200 English

Measures to monitor the progress and quality of the project

Max. 100 Chinese or 200 English

申請項目 Applications (2)

步驟二: 項目實施計劃(所有欄目必須填寫)
Step 2: Project Strategy and Implementation plan (All fields are mandatory)

Project's collaboration partners and pro bono advisors (If applicable)

Please indicate any confirmed or pending partnership and pro bono advisors, and clearly state the status of the partnership (confirmed/pending for confirmation) and their role in this project (e.g. technical partner, beneficiary recruitment, training provider etc.) For paid advisors, please include it in step 3 (Team capability and human resources).

1

Name of Organisation/Company/Individual
Max. 100 Chinese or 200 English

Role and duties in this project
Max. 100 Chinese or 200 English

Status
Please select

+ Add

← *可按此新增項目
Click to add item

Please compare this project with other existing social services (not limited to the services within your organisation or from other organisations) such as the uniqueness, differences and advantages.

Name of Project/Organisation	Service Content/ Beneficiaries	Service Approach/ Model	Other: Please Specify	
HKCSS	Max. 30 Chinese or 80 English	Max. 30 Chinese or 80 English	Max. 30 Chinese or 80 English	
	Max. 30 Chinese or 80 English	Max. 30 Chinese or 80 English	Max. 30 Chinese or 80 English	

← *填寫有關此項目資料
Fill in information about this project

← *填寫其他現行服務
Fill in information about other existing social services

+ Add

Key Performance and Impact Analysis of Relevant Service Experience

Max. 350 Chinese or 400 English
• Have similar project concepts been successfully completed in the past? In which relevant service experiences or cases have they proven effective?
Please provide relevant track record and performance of completed services or cases, including the specific data, or indicators used to describe their impact.

Project innovation and how does the project address the current service gap
Max. 200 Chinese or 250 English

Project Sustainability

How can the service model continue to operate and be scaled up or applied to other service areas after the funding period?
Max. 250 Chinese or 300 English

How the project can contribute to organisation development
Max. 100 Chinese or 200 English

申請項目 Applications (2)

步驟二: 項目實施計劃(所有欄目必須填寫)
Step 2: Project Strategy and Implementation plan (All fields are mandatory)

Has this project received any in-cash and/or in-kind donation/sponsorship from other sources?

○ Yes, please specify   ○ No

Have you received any funding from HKEX Foundation previously? (If applicable)

If yes, please list them down here.

Year	Project Name	Beneficial Organisation Name	Donation Amount	
-- Year -- ∨	Max. 30 Chinese or 80 English	Max. 20 Chinese or 60 English	HKD	

+ Add Funding Record

Upload Documents

Please upload the documents for reference. The actual project details will be based on the application plan submitted in the system. If you need to submit multiple files, please zip them into a single file and file must not exceed 5MB.

Please upload a logic model to illustrate your Project Goal, Inputs/Resources, Activities/Strategies, Outputs/Outcomes, Impact/Evaluation.

Choose File No file chosen

Other supporting that demonstrate the project (if applicable, in PDF format)
☑No file can be provided
Choose File No file chosen

Back   Save   Previous Step   Next Step

*請於填寫表格期間定期使用頁面左下角的'暫存'按鈕,以確保資料得以保存
please regularly use the 'Save' button in the lower left corner of the page to ensure that the data has been saved

申請項目 Applications (2)

步驟二: 項目實施計劃(所有欄目必須填寫)
Step 2: Project Strategy and Implementation plan (All fields are mandatory)

步驟三: 團隊能力及人力資源 (如適用)
Step 3: Team Capability and human resources (If applicable)

此頁填寫的人力資源預算是指項目安排特定人員來進行項目的統籌及監管, 而**個別活動中的導師費及直接服務中的人力資源費用應當作項目營運開支 (第五部分)** Please only include human resources for the project management and project monitoring of this specific project. **For tutor fee or relevant cost incurred by direct services, please include it in the operating expenses tab (part 5)**.

即使機構將承擔支出而無需申請人力資源預算，我們亦建議機構填寫項目團隊成員資料，並填寫機構承擔金額表示為機構自資職位，讓評審委員了解項目的人手安排,助評審流程
Even if some cost of manpower is contributed by organisation without requiring a budget, it is suggested that organisation to fill in the information of human resources and indicate the Organisation/Company Contribution amount. The provided information will be shared with the panel for their consideration.

1	2	3	4	5	6	7
Details of Project	Project Strategy and implementation plan	Team Capability and human resources (If applicable)	Project's sales/revenue (If applicable)	Cost of Programme Implementation (Excluded human resources)	Purchase of Project Assets (If applicable)	Summary

Project's sales/revenue (If applicable)

☑ There will be income from this project

Income

Type of Sales/Revenue	Details	Quantity	Unit cost	Total cost	
	Max. 10 Chinese or 20 English	No.	HKD	$0.00	
Remarks (please provide details of the breakdown)					

+ Add

Project's sales/revenue (Total)	$0.00

Back   Save

Previous Step   Next Step

申請項目 Applications (4)

*請於填寫表格期間定期使用頁面左下角的'暫存'按鈕,
以確保資料得以保存
please regularly use the 'Save' button in the lower left corner of the page to ensure that the data has been saved

步驟四:項目收入(如適用)
Step 4: Project's sales/revenue
(If applicable)

1	2	3	4	5	6	7
Details of Project	Project Strategy and implementation plan	Team Capability and human resources (If applicable)	Project's sales/revenue (If applicable)	Cost of Programme Implementation (Excluded human resources)	Purchase of Project Assets (If applicable)	Summary

申請項目 Applications (5)

步驟五: 填寫項目執行開支 (包括直接服務中的導師費及人力資源，而 項目管理的人力資源除外) Step 5: Fill in Cost of Programme Implementation (including tutor fees and human resources directly involved in providing services, excluding human resources for project management).

如項目執行開支包括行政費用，該行政費用必須不多於資助總額百分之十 (如適用) Administration Fee should not exceed 10% of the total requested sum (if applicable)

Cost of Programme Implementation (Excluded human resources)

Please include here cost for tutors or other fee incurred by direct services such as web development.

If there is "Central Administrative" (e.g. fixed fee charged by the parent company for providing central administrative services), it shall be presented as a separate item and be capped at 10% of the "Total Project Sum".

You are required to engage an accountant for conducting independent audits. Kindly incorporate the audit fees into the project's execution costs.

Cost of Programme Implementation

Projected cost

Type of expenses		Details	Quantity	Unit cost	Total cost	
-- Item --	-- Item --	Max. 10 Chinese or 20 English	No.	HKD	$0.00	
Remarks (please provide deta	Cost of goods sold					
	Training materials					
	Tutor cost					+ Add
	rent and rates					
	Equipment rental fee					
	Venue decoration fee	Amount requested – Cost of Programme Implementation (Total)			$0.00	
	Marketing					
	Volunteer subsidy					
	Insurance					
	Meal cost					
	Logistic / transportation cost					
	Central Admin overhead					
	Audit					
	Others					

Back Save

Previous Step Next Step

*可按此新增支出項目
 Click to add Budget item

有關行政費的範疇請參考社聯出版的<<社會服務中央行政成本>>
About administration cost for charity, please take reference to HKCSS <<Industry Standard Central Administrative Support>>)

1	2	3	4	5	6	7
Details of Project	Project Strategy and implementation plan	Team Capability and human resources (If applicable)	Project's sales/revenue (If applicable)	Cost of Programme Implementation (Excluded human resources)	Purchase of Project Assets (If applicable)	Summary

Purchase of Project Assets (If applicable)

Please include here the assets expenses, including assets such as Facilities / Equipment, software, renovation etc.

1

Type of assets

-- Type of assets --

-- Type of assets --
Facilities / Equipment
Software
Furniture & fixtures
Renovation and fitting out
Others

Name of assets to be purchased

Max. 15 Chinese or 40 English

Purpose

Max. 50 Chinese or 80 English

Quantity

Numbers only

Unit cost

HKD

Amount requested – Purchase of Project Assets (Sub-total) $0.00

+ Add

*可按此新增項目
Click to add item

申請項目 Applications (6)

步驟六: 項目資產購置 (如適用)
Step 6: Purchase of Project Assets (If applicable)

請在此頁填寫投放在資產上的資金，包括實物資產（如軟件、設備/器材、傢俬、裝修等）
Asset expenses, including assets such as software, facilities / equipment, furniture & fixtures, renovation etc.

網上申請程序Application Procedure

申請項目 Applications (7)

步驟7：總結－請檢查清楚所有數字是否正確或合乎要求

Step 7: Summary - Please check if all numbers are reasonable

Summary

Key milestones and performance indicators

Timeline	Implementation plan	Accumulative performance indicator
Before project launch (1 month preparation period)		
Phase 1 (Month 1 to 6)		
Phase 2 (Month 7 to 12)		
Phase 3 (Month 13 to 18)		
Phase 4 (Month 19 to 24)		
Phase 5 (Month 25 to 30)		
Phase 6 (Month 31 to 36)		

Target Beneficiaries

Target Beneficiaries	Primary beneficiaries	Secondary beneficiaries	Total
Children & Youth	20	0	20
Elderly	50	0	50
Families	0	200	200
New Arrival	0	100	100
Persons with Disabilities	10	0	10
People of diverse race	50	0	50
Total	130	300	430

Back

Previous Step   Confirm and Continue

步驟7乃系統自動運算版面，如有任何修改，請返回之前的步驟進行修改。
Step 7 is the automatic calculation generated by the system. If you have any amendment, please go back to the previous steps.

Cost of Programme Implementation

Details	Amount	Percentage of Total Expenses
Human Resources	$403,200.00	36.65%
cost a (Cost of goods sold)	$16,000.00	1.45%
training (Training materials)	$130,000.00	11.82%
tutor (Tutor cost)	$60,000.00	5.45%
venue (rent and rates)	$24,000.00	2.18%
equip (Equipment rental fee)	$100,000.00	9.09%
promo (Marketing)	$15,000.00	1.36%
insur (Insurance)	$90,000.00	8.18%
admin (Central Admin overhead)	$150,000.00	13.63%
Sub-total	$988,200.00	89.82%

Administration Fee should not exceed 10% of the total requested sum

Summary

	Total Amount
Total projected income	$42,000.00
Total projected cost	$518,000.00
Amount requested from HKEX Charity Partnership Programme	$476,000.00 The fund size for each proposed project should range from HKD500,000 to HKD5,000,000

申請項目 Applications (7)

步驟7: 總結 – 如有中央行政費用開支超出資助總額百分之十，則會有紅字提示
Step 7: Summary - If admin fee exceeds 10% of the total requested amount for the project, a notification in red text will appear

如項目總申請金額少於五十萬或超出五百萬，則會有紅字提示，請返回之前的步驟進行修改。
If the fund size for each proposed project under $500K or over $5M, there will be a notification in red text, please go back to the previous steps and adjust.

請在提交前於**步驟7檢查**清楚所有數字是否正確， 尤其"申請金額" Please check in Step 7 if all numbers are correct, especially the "Amount requested"

網上申請程序Application Procedure

步驟7: 總結 -若系統檢查到在任何步驟中有遺漏或錯誤的必填內容，或超出字數限制，將以紅字提示，請返回之前的步驟進行修改。

Step 7: Summary - If the system detects any missing or incorrect required information, or if the word limit is exceeded in any step, the columns will be indicated in red text. Please go back to the previous step to make the necessary modifications.

(若需確認在提交項目前是否已完成所有修訂，請再次點擊步驟7右下方的「確認資料及繼續」進行檢查)

(To confirm if all revisions have been completed before submitting the project, you can click the "Confirm and Continue" button at the bottom right of step 7 for another check.)

網上申請程序Application Procedure

Version1 (Waiting for submit) | Create Time: 2025-05-29 10:19:43 ⌄

Please hava a confirmation before submit the application.

Details of Project

Project Basic Information

Project Name (English)
TEST

Project Name (Chinese)
測試版本

Service Area(s) (Please tick, can choose more than one district)

All districts in HK

Project Summary
TEST TEST TEST TEST TEST TEST TEST TEST TEST TEST TEST TEST

Project Duration
36 months

Project Launch Date
2025-12-01

Project End Date
2028-11-30

Project should launch on 1 December 2025 and the project duration should be 12 or 24 or 36 months.

Forcus Area(s) (can choose more than one item;please list the areas of your project in order)

1. Financial Literacy
2. Social Empowerment
3. Talent Development
4. Environmental Sustainability

Back   Previous Step   **Confirm and Submit**

提交申請 Application Submission

成功進入「確認資料及繼續」版面後，請在確認頁面再次仔細檢查所有資料。
- 如果所有資料正確，請點擊右下方的「確認及提交」按鈕。
- 此頁面可供機構將整個項目內容進行「網頁列印」，以供負責同仁提交給主管或經理進行批核。
- 請仔細檢查，一旦項目成功提交申請，將無法再進行任何修改。

Upon successfully entering the "Confirm Data and Continue" section, please review the information once again on the confirmation page.
- If all the information is correct, please proceed to click the "Confirm and Submit" button at the bottom right.
- This page also offers the option for the organisation to "Print the Webpage" for the entire project content, which can be submitted to supervisors or managers for approval by responsible colleagues.
- Please review carefully, as no further revisions can be made once the project application has been successfully submitted.

網上申請程序Application Procedure

提交申請 Application Submission

確認所有資料正確並點擊「確認及提交」後，項目申請將被提交至後台。

- 您將會看到彈出視窗通知，表示申請已完成。
- 電子郵件通知將會發送至您在機構資料中填寫的「聯絡人」郵箱。您可以參考附件中的PDF文件，查看您提交的申請計劃書內容，並請記下申請編號，以便日後跟進之用

Once you have confirmed that all the information is accurate and clicked on "Confirm and Submit," your project application will be submitted to the backend.

- You will receive a pop-up notification indicating that the application has been successfully completed.
- An email notification will be sent to the Contact Person's email provided earlier in Organisation Information. You can refer to the attached PDF file to review the contents of your submitted project proposal. And please take note of your application number for future reference and follow-up.

網上申請程序Application Procedure

✉ **cppngo_hkex@hkcss.org.hk**

查詢 Enquiry

❝ 如在填寫及提交申請時有任何疑問或出現系統問題，請即時擷取螢幕畫面並於申請限期前傳送至本計劃電郵查詢。
在申請截止日期之後關於申請系統問題的查詢恕無法處理。

If you have any questions or encounter any system issues during the application and submission process, please take screenshots and send to our programme email for inquiry immediately before the application deadline. *Inquiries related to application system issues made after the deadline will not be processed.*

合作機構 In partnership with

HKEX Foundation 香港交易所慈善基金   社聯 HKCSS
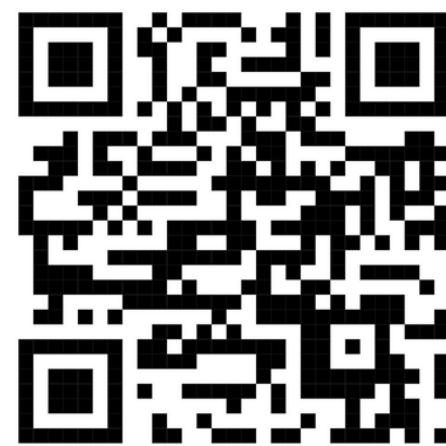
FAQ 常見問題

 CHI

 ENG

合作機構 In partnership with

合作機構 In partnership with

HKEX Foundation
香港交易所慈善基金

HKCSS 社聯

FAQ 常見問題

可提交多於一個申請嗎?
Can I submit more than one application?

- 可以，只要申請機構符合申請資格，而申請項目切合計劃的目的及資助範疇，歡迎提交申請。
- Yes, as long as the application meets the eligibility and focus area of the Programme.

FAQ 常見問題

可以聘用人手負責項目統籌／行政的工作嗎？或是請由現有同事負責有關工作嗎？ Can I apply funding from the Programme for new project management staffs or administrative staffs? Or it is required to assign existing staff to work on this project?

- 可以，申請者可選擇另行聘用人手或交由機構現有的職員負責本計劃的項目統籌／行政的工作。請將詳細填寫於申請系統的團隊能力及人力資源預算中。
- Yes, applicants could decide to hire additional staff or arrange existing staff to assist the project. Please fill-in the details in the "Team Capability and human resources" of the application system.

合作機構 In partnership with

HKEX Foundation 香港交易所慈善基金   HKCSS 社聯

FAQ 常見問題

申請項目可否接受其他的捐贈和贊助？
Can a project accept any donation or sponsorship from sources other than the Programme?

- 如計劃中有可預計的捐贈和贊助，應先在申請計劃預算中反映，並仔細列明捐贈和贊助的性質。項目不接受重複資助。
- If any donation or sponsorship for the project is anticipated, it should be reflected in the budget with details of the donation or sponsorship. Overlapping of resources is not allowed.

FAQ 常見問題

我的計劃書涵蓋多於一個重點範疇，會較有獲批優勢嗎**?**
Any advantages if my application include more than one focus areas?

- 不會。評審會跟據「評審準則」評分，包括項目的「與重點範疇的相關性」（10%）、「項目的產出、成果及社會影響」（25%）、「項目內容及執行計劃」（25%）、「項目的可持續發展」（15%）、「機構執行能力及過往紀錄」（15%）及「創新性」（10%）。
- No. The assessment will be based on the vetting criteria including Relevance with the Programme's focus areas (10%), Project output, outcome and social impact (25%), Project content and planning (25%), Project sustainability (15%), Organisation's capability and track record (15%) and Innovativeness (10%).

FAQ 常見問題

如果機構已營運超過3年，但於2022年7月19日獲得註冊，是否符合申請資格?
If the organisation has been operating for more than 3 years, but obtained registration on 19 July 2022, would it meet the eligibility to apply?

- 否，由於機構未能在申請截止日期之前滿足3年註冊要求，因此不符合本年度申請資格。
- No, the organisation does not meet the eligibility for this year application, as it failed to meet 3-year registration requirement before the application deadline.

FAQ 常見問題

除了網上申請平台，可以傳真或郵寄或其他途徑提交申請嗎？
Apart from this online platform, can I submit my application by fax, post or other methods?

- 不可以。我們只接受經本計劃網上申請系統 (https://cppngo.hkcss-co-creation.org.hk/) 提交的申請。
- No, all applications must be submitted through the online application system: https://cppngo.hkcss-co-creation.org.hk/

FAQ 常見問題

如未能在申請限期前提交申請，可以後補嗎?
If I cannot submit all required information and document by the application deadline, can I submit it later?

- 未能如期提交網上申請表及所需文件，有關申請將不獲考慮。
- No, incomplete applications will not be considered.

FAQ 常見問題

獲選項目的財務報告是否須獨立核數？Do I need to hire an independent accountant to audit?

- 是的，所有項目必須聘請會計師為這項目作獨立核數。請包括有關審計費用於申請系統的項目執行開支中。
- Yes, you are required to hire an independent accountant. Please fill in the details in the "Cost of Programme Implementation" of the application system.

查詢
Enquiry

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