

Policies and procedures

Eligibility

Registered charities / non-profit NGOs

(In HK: tax-exemption status approved by Inland Revenue Department, or establishment by ordinance. In other countries: full compliance with statutory requirements applicable to the country of registration.)

Coverage

- The Foundation is committed to improving the quality of life for all in the areas of healthcare, education, the arts, culture, heritage, amateur sport, animal welfare, conservation and the environment, and in particular to improving the lives of those who are deprived, underprivileged, or vulnerable to abuse or neglect.
- The Foundation places greater emphasis on charitable projects providing direct benefits to individuals and communities. Fully-justified funding requests for renovation works and equipment purchase / installation may also be considered.
- The project applied should be implemented in HK, Macau or China except in the circumstances of emergency relief or upon the Foundation's special invitation.

Application Procedures

- Applying organizations should first submit an on-line Preliminary Application Form. After an initial review, selected organizations will be invited to submit by post a Funding Application Form, or a Capital Project Funding Application Form depending on the nature of project. In special circumstances, an applicant may be invited to skip the Preliminary Application Form procedure.
- Review of applications would normally take 3 to 6 months after receiving the application form in good order.

Assessment

- The Foundation would look for good practices in terms of service operation, impact evaluation, sound management and innovation; and encourages continuous improvement.
- Priority would be given to projects which can demonstrate direct benefits to underprivileged individuals and communities, and long-term social impacts. The project would also be assessed for its relevance to social/service gap(s) and innovative components.
- An organization's capability of using the grant in the most cost-effective manner and exercising financial control is also crucial.
- Co-sponsorship of a project would be accepted if considered appropriate.
- An application would not be entertained if an application form (inclusive of the required attachments) has left any part unfilled, has not been sufficiently appended as required, or has not met the deadline requirement.

Payment & Reimbursement

- Grants are usually paid to organizations by reimbursement. In general, advance payment(s) would only be considered in circumstances when the organization faces a financial difficulty or due to other justified reasons. The payment method would be stated on the Funding Agreement signed between the Foundation and the Organization at time of approval.
- Organisations should read the Foundation's Guidelines on Use of Grants and Reimbursement before making an application to ensure they would be able to comply with the requirements.

Monitoring & Evaluation

- An organization is expected to plan, carry out and report the measurement of outcomes of the project. The Foundation may also conduct an independent evaluation which may include an audit of the project records upon completion, visiting the organization during the stage of implementation or upon completion, and meeting with some or all of the beneficiaries of the project, and the staff and collaborating parties involved.
- Intermediate Report(s) usually at 6-month interval(s) and a Final Report should be submitted according to the format and time frame required by the Foundation.

Approval

- A funding agreement shall be signed between the applying organization and the Foundation before formal approval and disbursement of grant.
- The decision of the Board of Trustees is final regarding all funding applications.