# LORD WILSON HERITAGE TRUST

**Application for Grant 2024-25**

Please read all notes, guidelines (separate document), tips for application (**Annex I),** and guidelines and samples for providing project estimates (**Annex II)** before completing this application form. Please complete the form in English. Please insert ‘N.A.’ in sections that are inapplicable.

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| 1. | **English and Chinese** title of the proposed project | | | |
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| **(I)** | **Information of the Applicant/Applying Organisation** | | | |
|  | **Individual Application / Organisation Application** | | | |
| 2. | **English and Chinese** name of applicant/applying organisation  (If the applicant is an individual, please indicate your salutation) | | | |
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| 3. | **English and Chinese** address of applicant/applying organisation | | | |
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| 4. | Telephone no. |  | Contact person  (if the applicant is an organisation) : |  |
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| 5. | Fax no. |  | | |
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| 6. | E-mail address |  | | |
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7. If the applicant is a non-profit making organisation, please

(a) indicate by a tick whether the organisation is:

registered under the Societies Ordinance, or

registered under the Companies Ordinance

(date of registration : ), or

exempted from registration;

(b) attach the documentary proof issued by the relevant Government department;

(c) briefly describe the organisation including its history and objectives, provision of services and facilities, membership size, etc.; and

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(d) indicate the name of Government department/bureau which is currently providing any subvention to the organisation.

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8. Previous grant applications submitted to the Lord Wilson Heritage Trust

**(“Trust”)**:

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| Year | Name of the Project | Amount ($) | Result  (Successful/  Unsuccessful) |
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**(II) Details of the Proposed Project** (If necessary, please continue on separate sheets in accordance with the format and presentation of this form.)

9. Please briefly describe the purpose and overall planning of the project in no more than 300 words

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10. Project deliverables

*(\*Please delete as appropriate)*

| **Deliverables** | **Details of Implementation**  **[Please avoid repeating information]** |
| --- | --- |
| ***Research/publication project*** | |
| Book/Booklet/Academic journal\*   * No. of copies: \_\_\_\_\_\_\_\_\_\_ * No. of pages: \_\_\_\_\_\_\_\_\_\_ * Language: \_\_\_\_\_\_\_\_\_\_\_\_\_ * Availability of an electronic version: Yes No  If yes, the electronic version will be uploaded onto the internet for free public access at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Name of author: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target publisher: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Distribution:  1. \_\_\_\_\_\_\_\_\_\_\_copies will be distributed for free to the following persons/   organisations:   |  | | --- | |  | |  | |  | |  |  1. \_\_\_\_\_\_\_\_\_\_\_copies will be put on sale.   (Projects must be non-profit making in nature, and that any surplus derived from the sale of publication must be refunded to the Trust) | Please provide information in point form on (1) research scope and period, (2) research methodology (e.g. field study, archival research, interview, etc.), (3) list of proposed interviewees (English and Chinese name and position), field trip location and details (and reasons for conducting field trip outside Hong Kong if applicable), (4) number of types of research materials covered, and (5) table of contents and outline of publication.   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |
| Manuscript/Research report\*   * No. of words: \_\_\_\_\_\_\_\_\_\_\_ * Language: \_\_\_\_\_\_\_\_\_\_\_\_\_ * Distribution channel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Please provide information in point form on (1) research scope and period, (2) research methodology (e.g. field study, archival research, interview, etc.), (3) field trip location and details (and reasons for conducting field trip outside Hong Kong if applicable), (4) number of types of research materials covered, and (5) outline of manuscript and research report.   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |
| ***Education/publicity project*** | |
| Educational Activities:  Talk/Lecture   * No. of talks/lectures: \_\_\_\_\_\_\_\_ * Duration per talk/lecture: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_hour(s) * No. of participants per talk/lecture: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   Workshop   * No. of workshops: \_\_\_\_\_\_\_\_\_\_ * Duration per workshop: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_hour(s) * No. of participants per workshop: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   Guided tour   * No. of tours: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Duration per guided tour: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_hour(s) * No. of participants per tour: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   Training session   * No. of sessions: \_\_\_\_\_\_\_ * Duration per training session: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_hour(s) * No. of participants per session: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   Experience-sharing session   * No. of sessions: \_\_\_\_\_\_\_\_\_\_\_\_ * Duration per session: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_hour(s) * No. of participants per session: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   Exhibition   * No. of exhibitions: \_\_\_\_\_\_\_\_\_\_ * Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Period: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   Others (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   * No. of events: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Duration per event: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_hour(s) * No. of participants for each event: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Target participants: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Please provide information in point form on (1) channel to invite participants, (2) content of each activity (e.g. route of guided tour, content of talk/workshop, details of training session, etc.), (3) details on speakers and/or instructors, (4) purpose and content of exhibition (e.g. number of exhibition panels, number and category of exhibits), (5) whether the exhibition panels and/or exhibits will be relocated for storage/exhibition.   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |
| Publicity Materials:  Poster   * No. of designs: \_\_\_\_\_\_\_\_\_\_\_\_\_ * No. of copies for each design: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Distribution channel:  |  | | --- | |  | |  |   Leaflet   * No. of designs: \_\_\_\_\_\_\_\_\_\_\_\_\_ * No. of copies for each design: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Distribution channel:  |  | | --- | |  | |  |   Pamphlet   * No. of pages: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ * No. of copies: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Distribution channel:  |  | | --- | |  | |  |   Others (please specify)   * No. of copies: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Distribution channel:  |  | | --- | |  | |  | | Please provide information in point form on the outline of the publicity materials.   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |
| Audio/video recordings\*   * No. of recordings: \_\_\_\_\_\_\_\_\_\_\_ * Duration: \_\_\_\_\_\_\_\_\_\_\_minutes * Distribution:  |  |  | | --- | --- | |  | The video will be uploaded onto the internet for free public access at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  | |  | \_\_\_\_\_\_\_\_\_\_\_\_\_copies of CD/DVD\* will be produced for distribution to the following target persons/organisations: | |  | |  |  | |  |  | |  |  | |  |  | | Please provide information in point form on the content of the audio/video recordings (e.g. number of oral history interviews included).   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |
| Website/Mobile application\*  Set up a new website/mobile application\*  Enhance existing website/  mobile application\* | Please provide in point form on the content of the website/mobile application.   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |
| ***Archaeological investigation and excavation project*** | |
| Please specify:   |  | | --- | |  | |  | |  | |  | |  | | Please provide information in point form on the (1) place, purpose, scope and methodology of the investigation/excavation, and (2) the curriculum-vitae of excavating persons/details of organisation.   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |
| ***Conservation project of historic building and structures*** | |
| Please specify:   |  | | --- | |  | |  | |  | |  | |  | | Please provide information in point form on (1) location of the building, purpose and scope of the conservation project, and (2) details of the conservation works (e.g. time required, the responsible worker/contractor for the renovation works, etc.)   |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |  | |

11. Schedule of implementation

[Note:

(1) Applicants should ensure that their projects could be completed in accordance with the schedule of implementation. Projects which could not be completed as scheduled may be terminated by the Council of the Trust (“**Council**”). To formulate a realistic implementation schedule, applicants should take into account the necessary work arrangements for completion of each deliverable and the factors detailed in Section (B) of **Annex I**.

(2) Please use the number of months required for each stage of work (e.g. 1st to 3rd month), instead of the actual month (e.g. March 2025 to May 2025) to minimise any need to revise the implementation schedule due to any delay in obtaining the final funding approval from the Council.]

**The proposed project will take a total of \_\_\_\_\_\_months to complete. Detailed schedule is as follows:**

| **Period** | **Project Works** | **Works completed**  **in each period** |
| --- | --- | --- |
| E.g.: 1st to 3rd month | * Recruitment of research assistant * Invitation of interviewees for conducting oral history interview | * Research assistant recruited * Interviewees confirmed |
| E.g. 4th to 9th month | * Data collection (including past newspaper, publication) * Field visit and writing field-visit report | * Copies of past newspapers, extracts of publication * Field-visit report |
| E.g. 10th to 16th month | * Design of poster and leaflet * Writing of the publication | * Confirmed design of poster and leaflet * Manuscript of the publication |
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**(III) Estimates of the Proposed Project**

12. Project estimates **(Please refer to Annex II for the guidelines and examples of project estimates)**

[Note: In general, the following project expenditure will **not** be supported:

1. remuneration to the applicant/applying organisation, its employee or office bearer;
2. administrative overhead fee charged by the applying institution/organisation;
3. purchase of stationery and general equipment (e.g. computer, printer, camera, etc.);
4. recurrent expenditure (e.g. hosting and maintenance of website); and
5. contingency fee.]
6. Please provide detailed itemised breakdown of estimated costs and attach copies of quotations, plans, sketch maps, photographs, and other relevant information where appropriate. The information required for the respective expenditures is as follows:

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| --- | --- | --- |
| **Expenditure Items** | **Item**  **Estimates ($)** | **Total ($)** |
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| **Total expenditure:** | |  |

1. If the project estimates in (a) above include estimates for the purchase of special equipment, please provide reason for such purchase below:

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| --- | --- | --- |
| Name of Special equipment | Estimates ($) | Justifications for purchase of the special equipment |
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1. Other sources of finance (including assistance from Government and/or other institutions):

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| --- | --- | --- | --- | --- | --- |
|  | I/We did not seek other sources of finance for the proposed project. | | | | |
|  | I/We had/have already sought other sources of finance for the proposed project with details as follows: | | | | |
| Name of Government department/funding | | | Amount requested  ($) | | Amount approved  ($) |
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| **Total﹕** | | | | |  |

1. If the project/deliverables involve recurrent expenses (such as upkeep, maintenance of website/application programme, etc),

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| --- | --- | --- |
|  |  | I/We agree to pay the recurrent expenses in connection with the project/deliverables myself/ourselves. |

|  |  |  |
| --- | --- | --- |
|  |  | I/We do not agree to pay the recurrent expenses in connection with the project/deliverables myself/ourselves. |

13. Amount of grant applied for

$\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (= Item 12(a) – 12(c))

**(IV) Staff/Advisor of the proposed project**

14. Qualification of the person responsible for the proposed project:

1. My/Our experience in heritage preservation is as follow:

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1. For application submitted by an individual, please enclose your curriculum vitae.
2. For application submitted by an organisation, please advise:

The project will be implemented by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Name), who is the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Post-title) of the organisation. His/her curriculum vitae is enclosed.

15. For proposed projects which involve other research officers or project staff, please provide below the number of research officers/project staff (part-time or full-time) employed, their qualification/relevant experience and respective duties:

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16. Project advisors (if applicable)

1. The following expert(s) in related field has/have agreed to serve as project advisor(s):

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| --- | --- | --- |
| English and Chinese Name of project advisor(s) | English and Chinese Position | Has the project advisor consented to take up the post?  (Yes/No) |
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1. The role and qualification of the project advisor(s):

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**(V) Others**

17. For archaeological investigation and excavation project, the applicant/applying organisation must have secured a licence from the Antiquities Authority under the Antiquities and Monuments Ordinance (If the applicant/applying organisation is unable to obtain the required licence, the Council may not consider the application any further):

|  |  |  |
| --- | --- | --- |
|  |  | I/We **have obtained** the required licence and a copy of the licence is enclosed. |

|  |  |  |
| --- | --- | --- |
|  |  | I/We have **not yet** obtained the required licence for the following reason(s): |
|  |  |  |
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|  |  |  |
|  |  | Not applicable. |

18. For conservation project of historical buildings and structure, the applicant/applying organisation must be the owner of the building or his/their authorised representatives (If the applicant/applying organisation is unable to obtain the authorisation of the owner, the Council may not consider the application any further):

|  |  |  |
| --- | --- | --- |
|  |  | Yes, I am/we are the owner of the building. |

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| --- | --- | --- |
|  |  | Yes, I am/we are the authorised representatives and the letter of authorisation from the owner is enclosed. |
|  |  |  |
|  |  | No, I/we have not yet obtained the authorisation from the owner, reasons being: |
|  |  |  |
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|  |  | Not applicable. |

19. Applicant shall enter into a licence agreement with the Board of Trustees of the Trust and the Government of the Hong Kong Special Administrative Region (“Government”) **before the advancement of any grants**to grant the Trust and the Government and their respective authorised users, assigns and successors-in-title an irrevocable, non-exclusive, perpetual, freely-transferrable, sub-licensable, royalty-free and worldwide licence to use the interim project deliverables[[1]](#footnote-1), project deliverables[[2]](#footnote-2) and/or works[[3]](#footnote-3) to be created by the Grantee(s) for academic, educational, publicity and promotional purposes (“**Licence Agreement**”)*.* The Council may consider rejecting the application if the applicant refuses to sign the Licence Agreement.

|  |  |  |
| --- | --- | --- |
|  |  | I/We agree to sign the Licence Agreement |

|  |  |  |
| --- | --- | --- |
|  |  | I/We do not agree to sign the Licence Agreement |

Reasons:

20. I/We certify that the details given above are correct and accurate to the best of my/our knowledge, and I/we understand that the Trust will, at any time, reject any application with:

1. any false, untrue, forged, inaccurate, incorrect or incomplete declarations, guarantees, or representations;
2. any plagiarised, copied, misleading or concealed content and/or information, including but not limited to the information as contained in the application form and/or supporting documents; and

(c) any content or information that infringe the intellectual property rights of any person or contravene the Copyright Ordinance (Cap. 528), including but not limited to information as contained in the application form and/or supporting documents.

21. I/We understands that in case of any application falling under the description of paragraph 20(a) to (c) above, the Trust will rescind any approved grants (if any) or claw back a portion of or all of the funding support already disbursed (if any).

22. I/We also undertake to inform the Secretary of the Council if, subsequent to this application, there is any change in the information provided in this form or I/we apply for funds from other sources for the same project.

23. I/We understand and agree that this Application Form and the documents submitted in support of the application may be copied, and the Application Form and supporting documents (or their copies) will be provided to the Trust, other Government departments, bureaux and other organisations or agencies and other persons authorised to process my/our application for determination of my/our eligibility and assessment of the merits of the proposed project and for all other purposes incidental thereto or in connection therewith.

24. I/We understand that the Trust reserves the right to disqualify any applicant at any time on grounds that:

1. the applicant (including any persons/researchers-in-charge of the projects, project personnel and/or collaborators) has engaged, is engaging, or is reasonably believed by the Trust to have engaged or be engaging in acts or activities that are likely to cause or constitute the occurrence of offences endangering national security or otherwise be contrary to the interest of national security; and
2. it is reasonably believed by the Trust that the disqualification of the applicant is necessary in the interest of national security, or is necessary to protect the public interest of Hong Kong, public morals, public order and/or public safety.

25. I/We also understand that in case of the occurrence of the events under paragraph 24(a) or (b) above, the Trust may rescind any approved grants (if any) or claw back a portion or all of the funding support already disbursed (if any).

Official Seal (if applicable)

(The application should be signed by two authorised persons if it is submitted by an organisation.)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Signature(s) |  |  |  |  |
| Name |  |  |  |  |
|  |  |  |  |  |
| Position in  Organisation (if applicable) |  |  |  |  |
| Date |  |  |  |  |

Notes on Collection of Personal Data

1. The personal data contained in the application are collected for the following purposes:
   1. determination of the application’s eligibility; and
   2. assessment of the merits of the proposed project.

The applicant’s personal data will be handled with care. Such information may be provided to any third parties in connection with the process of the application on a need-to-know basis. The information will not be used for any other purposes.

1. The applicant’s request for access to or correction of personal data should be made in writing to the Secretary of the Council.

**June 2024**

**Lord Wilson Heritage Trust**

**Annex I**

**Tips for Application**

**A. Application Details**

* Whether the application is submitted by an organisation or an individual? For example, if you work for a post-secondary institution, please consider whether an organisation or an individual application should be submitted. The grant will be made to an individual if it is an individual application. The grant will only be made to an organisation if it is an organisation application.
* Whether all information as required in the application form, such as project details, implementation schedule, project deliverables, itemised breakdown of the estimated costs, etc., has been provided?

**B. Formulation of Realistic Implementation Schedule**

* Whether a realistic implementation schedule is set? Have you considered:

1. Your other work engagement
2. Commencement of the project
   * The project may not commence immediately after the consideration of the application by the Council. The Council may require the applicant to revise the proposal and time should also be allowed for completion of the formalities, e.g. signing of the undertaking.
3. Project implementation
4. Research project
   * Allow sufficient time to identify interviewees and conduct interviews, e.g. need to contact additional interviewees, interviewees are not in Hong Kong, etc.
   * Allow sufficient time to collate data.
5. Publication project
   * Allow adequate time for inviting quotations.
   * Allow sufficient time for translation, editing, typesetting, designing and printing the publication, which may take a few months to complete. Common problems include taking extra time for liaising and revising the design work and content of the publication.
   * Allow sufficient time for conducting two to three rounds of peer review, which may take several months or a year.
   * Allow sufficient time to identify publisher and finalise publishing details with the publisher, which may take a few months or a year to complete.
6. Outdoor activities
   * Weather condition.
7. Educational activities
   * Cater for the school/summer holidays when organising activities for students.
8. Workshops/exhibitions/performance
   * Cater for the availability of venues.

**C. Obtain Licence, Authorisation and Attach Relevant Documents**

* For applying organisation which is a non-profit making organisation, whether the relevant documentary proof is attached?
* If it is an archaeological investigation and excavation project, whether a relevant licence has been obtained in accordance with the Antiquities and Monuments Ordinance? The Council may reject the application if a relevant licence is not obtained.
* If it is a conservation project of historical building and structures, whether the owner has authorised to submit the application and whether the relevant documentary proof has been attached?
* Whether copies of updated quotation, plans, sketch maps, photographs and other relevant information have been attached?

**Annex II**

**Project Estimates**

**(Sample for reference only)**

* Provide detailed itemised breakdown of estimated costs, including the unit price, number of days, number of copies, etc:

1. Expenditures on staff remuneration (such as research staff/project assistant): please provide information on (a) the calculation method of remuneration and amount (such as hourly rate/daily rate/monthly rate/contract basis); (b) mode of employment (full-time, part-time or self-employed); and (c) duties of the posts and qualification/experience requirements. [Note: Applicants are advised to include the expenditures for contribution of mandatory provident fund and securing employees’ compensation insurance policy, if any.]
2. Expenditures on speaker/consultant remuneration: please provide information on the calculation method for the remuneration and amount, the qualification of the speaker(s)/consultant(s), etc.
3. Expenditures on subsidies for volunteers/working staff/performers: please provide information on (a) the calculation method of the subsidies and amount; (b) number of volunteers/working staff/performers; and (c) their duties, etc.
4. Expenditures on local transportation subsidies: please provide information on the transport frequency, the respective subsidies required and the number of working staff involved.
5. Expenditures on non-local field study: please provide information on (a) the number of persons undertaking the field study; (b) the destination and duration of the field trip; and (c) a breakdown of the expenditures for the field trip (e.g. number of days and amount per day, transport to and from the destination of the field trip, local transport, meals, etc.).
6. Expenditures on purchase of/copying of reference/archival materials: please provide information on the number of copies required and unit price.
7. Expenditures on hiring of venue: please provide unit price and the number of hiring days/hours, related breakdown (such as hiring of facilities, decoration of venue, etc.).
8. Expenditures on organising educational/community activity: please provide information on the number of sessions and related breakdown (such as number of working staff and related subsidies, procurement of materials for education activities, transportation, purchase of insurance policy, etc.).
9. Expenditures on publication/publicity materials: please provide a breakdown of expenses for translation, design, typesetting, proofreading, publishing, production of e-version, etc.
10. Expenditures on film making: please provide a breakdown of expenses for design, shooting, production of captions, post-production, production of DVD, etc.
11. Expenditures on development of webpage and application programme: please provide a breakdown of expenses for purchase of domain names, design, etc.
12. Please provide breakdown of miscellaneous payment (including photocopying fee, transportation fee, etc.).

[Note: Please note that as a general rule, purchase of stationery and general equipment (e.g. computer, printer, camera, etc.) would normally not be accepted except under very special circumstances.]

1. For a grant exceeding HK$100,000, grantees are required to submit an audited account prepared by a certified public accountant upon completion of project. It is advised that the applicant should include the auditor fee in the proposed budget.

* Attach copies of updated quotations, plans, sketch maps, photographs, and other relevant information where appropriate.

**Examples**

1. **Project Estimates - Education and Publicity**

XXX: denotes number to be filled in

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | ***Common Items*** |  | ***Item Estimates***  ***($)*** | ***Total***  ***($)*** |
| (a) | Documentary Production:   * Video shooting and footage fee   [$XXX Unit cost x No. of days = $XXX]   * Fee for production of XXX minutes/hours video * Fee for production of DVD   [$XXX Unit cost x No. of copies = $XXX] |  | xxx  xxx  xxx | xxx |
| (b) | Website design and maintenance:   * Design fee * Production fee |  | xxx  xxx | xxx |
| (c) | Public talk:   * Remuneration for ushers/helpers   [$XXX Unit cost x No. of ushers/student helpers x No. of talks = $XXX]   * Honorarium to moderator * Honoraria to speakers   [$XXX Unit cost x No. of speakers = $XXX]   * Venue rental fee   [$XXX Rental fee per session x No. of talks = $XXX]   * Videography/photography fee * Sound and equipment fee |  | xxx  xxx  xxx  xxx  xxx  xxx | xxx |
| (d) | Workshops:   * Honorarium for instructor   [$XXX Unit cost x No. of hours x No. of workshops = $XXX]   * Allowance for helpers   [Unit cost x No. of helpers = $XXX]   * Materials fee for workshop |  | xxx  xxx  xxx | xxx |
| (e) | Experiences sharing session:   * Fee for venue set up * Fee for printing of handouts   [$XXX Unit cost x No. of copies = $XXX] |  | xxx  xxx | xxx |
| (f) | Fee for production of poster/leaflet/booklet  [$XXX Unit cost x No. of copies = $XXX] |  |  | xxx |
| (g) | Exhibition:   * Fee for production of exhibition panels/exhibits   [$XXX Unit cost x No. of panels/exhibits = $XXX]   * Transportation fee of panels/exhibits   [$XXX Unit cost x No. of times = $XXX]   * Stage production fee * Venue set-up fee   [$XXX Unit cost x No. of days = $XXX]   * Allowance for a docent   [$XXX Unit cost x No. of days = $XXX]   * Venue fee   [$XXX Daily charge x No. of days = $XXX]   * Production fee of backdrop   [$XXX Unit cost x No. of copies = $XXX] |  | xxx  xxx  xxx  xxx  xxx  xxx  xxx | xxx |
| (h) | Audit fee (to comply with the Trust’s requirement) |  |  | xxx |
|  | **Total expenditures:** |  |  | xxx |

1. **Project Estimates - Research and Publication**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | ***Common Items*** |  | ***Item Estimates*** | ***Total***  ***($)*** |
| (a) | Research:   * Remuneration for part-time/full-time research assistant (RA) /administration assistant (AA) /project manager (PM) /project officer (PO)   Example 1  Part-time  [$XXX Hourly/monthly salary x employment period = $XXX]  Example 2  Full-time  [$XXX Monthly salary x employment period  + 5% MPF contribution = $XXX]   * Photocopying of archival materials |  | xxx  xxx  xxx | xxx |
| (b) | Field Trip:  Example 1   * Local field study   Transportation fee  [$XXX Unit cost x No. of persons x No. of trips = $XXX]  Example 2   * Non-local field study * Accommodation fee   [$XXX Unit cost x No. of nights = $XXX]   * Meal allowance   [$XXX Unit cost x No. of persons = $XXX]   * Transportation fee   [$XXX Unit cost x No. of persons = $XXX] |  | xxx  xxx  xxx  xxx | xxx |
| (c) | Production fee of publication  [$XXX Unit cost x No. of copies = $XXX] |  |  | xxx |
| (d) | Postage fee of delivering publication to NGO/schools  [$XXX Unit cost x No. of copies = $XXX] |  |  | xxx |
| (e) | Audit fee (to comply with the Trust’s requirement) |  |  | xxx |
|  | **Total expenditure:** |  |  | xxx |

1. **Project Estimates - Restoration and Repairs**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | ***Common Items*** |  | ***Item Estimates***  ***($)*** | ***Total***  ***($)*** |
| (a) | Consultancy fee:   * Condition survey fee * Fee for recommendation on defect rectification * Material analysis fee   [$XXX Unit cost x No. of samples = $XXX] |  | xxx  xxx  xxx | xxx |
| (b) | Restoration work fee |  |  | xxx |
|  |  |  |  |  |
| (c) | Licence fee |  |  | xxx |
|  |  |  |  |  |
| (d) | Photocopying fee of archival materials |  |  | xxx |
| (e) | Application fee for the proposed location filming at government venues/facilities |  |  | xxx |
|  |  |  |  |  |
| (f) | Audit fee (to comply with the Trust’s requirement) |  |  | xxx |
|  | **Total expenditure :** |  |  | xxx |

1. The definition of interim project deliverables is set out in clause (r) of the Undertaking at **Annex I** of Guidelines for Applicants. [↑](#footnote-ref-1)
2. The definition of project deliverables is set out in clause (s) of the Undertaking at **Annex I** of Guidelines for Applicants. [↑](#footnote-ref-2)
3. The definition of works is set out in clause (aa)(iii) of the Undertaking at **Annex I** of Guidelines for Applicants. [↑](#footnote-ref-3)