**Points to Note 計劃書填寫須知**

* All parts of the Project Proposal have to be completed.
項目計劃書所有部分皆需填寫。
* You may complete the Project Proposal either in Chinese or in English (except for Part A).
除了A部分以外，你可以中文或英文填寫項目計劃書。
* You may use point form to fill in the Project Proposal, with no more than 25 pages including all graphs, figures and images but excluding “Appendix: Declaration and Consent of the Partnership/ Collaboration/ Support to the Applicant/ Organisation”.
項目計劃書可以列點填寫，總計頁數不可超過25頁，包括所有圖表、圖像及圖片，但不包括「附件︰與申請人／機構有合作關係的聲明及同意書」。
* The font size should not be less than 11.
項目計劃書內文字體大小不得小於11。
* Key Performance Indicators (KPIs) of Part B “Summary of Key Performance Indicators Within Funding Period (Cumulative)” shall be in line with the Schedule of “Key Milestones and Activities Within Funding Period” mentioned in Part C. You may refer to the example in both parts.
B部分「資助期內關鍵績效指標概要（累積）」的目標與C部分「資助期內主要里程碑及活動概要」的內容須互相對應，你可參考兩部分的例子。
* KPIs and Key Milestones and Activities in Part B and Part C shall be in line with those in “Implementation Plan (Future Six Years)” in Part D4 (II).
B部分的關鍵績效指標與C部分的主要里程碑及活動須與D4 (II) 部分的「推行方案（未來六年）」相符。
* Part A has to be signed by the Individual Applicant (only applicable to Requested Funding Amount not more than $300,000) or the Key Management for Limited Companies / Organisations Application before submission.
項目計劃書需由以個人名義申請者（只適用於申請不多於30萬港幣的項目）或以有限公司／機構名義申請者的主要管理人簽署確認。
* If the current collaboration status of the collaborator in Part D4 (V) “Cross-sector Collaboration” is “Collaboration Confirmed”, please provide the signed “Appendix: Declaration and Consent of the Partnership / Collaboration / Support to the Applicant / Organisation” of each of them.
如D4 (V) 部分「跨界別協作」中的協作伙伴合作現況為「已獲確認」，請提交該協作伙伴所簽妥之「附件︰與申請人／機構有合作關係的聲明及同意書」。
* Please provide the signed “Appendix: Declaration and Consent of the Partnership / Collaboration / Support to the Applicant / Organisation” from each advisor mentioned in Part D6 (II) “Network and Advisors”.
請提交D6 (II) 部分「網絡及顧問」中的每位顧問所簽妥之「附件︰與申請人／機構有合作關係的聲明及同意書」。

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**Social Innovation and Entrepreneurship Development Fund 社會創新及創業發展基金**

**Innovator Farm創新園**

**Project Proposal項目計劃書**

1. **Project and Applicant / Organisation Information 項目及申請人／機構資料**

|  |  |
| --- | --- |
| Project Name  | (English) |
| 項目名稱  | (中文) |
| Name of Applicant / Organisation | (English) |
| 申請人／機構名稱  | (中文) |
| Project Description(Maximum 120 Words) | (English) |
| 項目簡介(150字以內) | (中文) |
| Location / Venue實施地點 |  |
| Requested Funding Period申請資助期 | 12 / 18 / 24 / 36 Months 個月 *[Please delete as appropriate 請刪去不適用者]* |
| Requested Funding Amount from SIE Fund申請社創基金資助金額 | 港幣 HK$  | Total Funding Required所需總資金 | 港幣 HK$  |
| Matching Fund Amount (if applicable)配對基金金額（如適用） | 港幣 HK$  |
| Beneficiaries and Number受惠群體及人數 | Beneficiary groups: Children and Youth / Elderly / Persons with Disabilities / People of Diverse Race / Low-income Families / Others (Please specify)受惠群體︰兒童及青少年／長者／殘疾人士／不同種族人士／低收入家庭／其他 （請註明） |
| *[Please choose from the options provided above 請從以上選項選取適用者]* |
| Primary主要︰ | Number人數： |
| Secondary (if any) 次要 (如有)︰ | Number人數： |

|  |  |  |
| --- | --- | --- |
|  |  |  |
| Company Chop and Signature of Key Management / Signature of Individual Applicant公司印章及主要管理人簽署／個人名義申請者簽署Name姓名： |  | Date日期 |

1. **Summary of Key Performance Indicators Within Funding Period (Cumulative) 資助期內關鍵績效指標概要（累積）[[1]](#footnote-1)**

*Only targets within the requested funding period are required 只需填寫****申請資助期內****目標*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Key Performance Indicators to be achieved須完成之關鍵績效指標Key Performance Indicators to be achieved have to tally with those in **D4. Implementation / Execution** – (II) Implementation Plan (within Funding Period only) 關鍵績效指標必須對應 **D4. 項目執行** (II) 推行方案（資助期內） | Month 1-6第1-6個月 | Month 7-12第7-12個月 | Month 13-18第13-18個月 | Month 19-24第19-24個月 |
| *Example例子* | *No. of elderly people participating in training course**參加培訓課程的長者數目* | *10名* | *20名* | *35名* | *50名* |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |
| 6 |  |  |  |  |  |
| 7 |  |  |  |  |  |
| 8 |  |  |  |  |  |

*[You may add or delete rows if you have more / fewer KPIs 如有更多／更少關鍵績效指標，請自行增加／刪除列數]*

1. **Key Milestones and Activities Within Funding Period 資助期內主要里程碑及活動概要[[2]](#footnote-2)**

|  |  |
| --- | --- |
| Period Covered時間表 | Key Milestones and Activities主要里程碑及活動Key Milestones and Activities to be achieved have to tally with those in **D4. Implementation / Execution** – (II) Implementation Plan (within Funding Period only) 主要里程碑及活動必須對應 **D4. 項目執行** (II) 推行方案（資助期內） |
| *Example* *例子* | * *Recruitment of elderly participants招募長者參加者*
* *Launch of the training course啟動培訓課程*
 |
| Month 1-6第1-6個月 |  |
| Month 7-12第7-12個月 |  |
| Month 13-18第13-18個月 |  |
| Month 19-24第19-24個月 |  |

*[Please delete rows beyond the requested funding period 請刪除申請資助期以外的列數]*

1. **Project Details 項目詳情**
	1. **Project Objective 項目目標**

|  |
| --- |
| (How the project can address poverty and/or social exclusion in Hong Kong? Please describe the project objective(s) which is/are addressing at least one of the following social issues in Hong Kong, e.g.: Preventing and alleviating poverty; Preventing and alleviating social exclusion; Promoting social integration; Enhancing people’s well-being; Enhancing cohesion of society.)（項目如何應對香港的貧窮或／及社會孤立問題？闡述項目達到以下哪個／些目標，例如：達致扶貧和防貧、解決社會孤立問題、促進共融、提升市民福祉、加強社會凝聚力等。） |

* 1. **Social Issue & Market Analysis 社會問題及市場分析**

|  |
| --- |
| **(i) Social Issue Analysis 社會問題分析**(Please provide your understandings on the key beneficiaries and social issues, and explain how the project can address their needs.)（請提供對受惠群體及社會問題的理解，並解釋項目如何針對其需要。） |
| **(ii) Market Analysis 市場分析**(Please outline the results of your market research, for example, SPOT analysis, competitor analysis, mystery customer or market landscape survey, expert interview etc.) （請概述與項目內容或營運模式相似／相同的市場調查，例如：強弱機危分析、競爭對手分析、神秘顧客、市場地貌調查、專家訪談等。） |
| **(iii) SPOT Analysis 強弱機危分析** |
| Strengths團隊／項目現有強項 | Opportunities未來社會／市場機會 |
| Problems 團隊／項目弱項 | Threats 潛在危機 |
| **(iv) Value Proposition 市場定位及機遇** |

* 1. **Innovativeness 項目創新性**

|  |
| --- |
| (Please explain the innovativeness of the project, for example, Products and Services, Platform Building, Policy (Neglected Social Problem), Production Process, Operating Model, Business Model, Promotion and Marketing, etc.)（請說明項目的創新性，例如：產品或服務、平台建立、政策（被忽視的社會問題）、生產流程、營運模式、商業模式、宣傳或市場推廣等。） |

* 1. **Implementation / Execution 項目執行**

|  |
| --- |
| **(I) Sustainability and Operating Model可持續性及營運模式**(Please illustrate your operating model in a visual way or in writing and explain how this project can sustain after the funding period. You may demonstrate the revenue streams, source of target customers and breakeven time calculation in this part.)（請透過圖表、流程圖或文字等方式表達項目之營運模式，並如何在資助期後持續。你可在這部份闡述收入來源、來源及回本期計算。） |
| (II) Implementation Plan (Future Six Years) 推行方案（未來六年）(Shall be in line with Key Performance Indicators in Part B and Key Milestones and Activities in Part C.)（須與B部分的關鍵績效指標與C部分的主要里程碑及活動相符） |
| Period Covered時期 | Key Performance Indicators (KPIs)關鍵績效指標[[3]](#footnote-3) | Key Milestones and Activities主要里程碑及活動[[4]](#footnote-4) |
| Within Funding Period 資助期內 |
| *Example例子* | *10 elderly people participated in training course10名長者參加課程* | *Recruitment of elderly people招募長者參加* |
| *Launch of the training course啟動培訓課程* |
| Month 1-6第1-6個月 |  |  |
| Month 7-12第7-12個月 |  |  |
| Month 13-18第13-18個月 |  |  |
| Month 19-24第19-24個月 |  |  |
|  |  |  |
|  |  |  |
| After Funding Period 資助期後 |
|  |  |  |
|  |  |  |
|  |  |  |

*[Please add or delete rows as appropriate請按需要增加或刪減列數]*

|  |
| --- |
| (III) Publicity, Marketing and Promotion 宣傳、市場營銷及推廣(Please explain the marketing strategy of the project and provide previous media coverage (if any).)（請闡述項目的市場營銷策略及提供過往的媒體報道（如適用）。） |
| (IV) Risk Analysis & Mitigation Plan 風險分析及應對方案 |
|  | Risk風險 | Impact (High/ Medium/ Low)對項目影響(高／中／低) | Probability (High/ Medium/ Low發生可能性(高／中／低) | Mitigation Plan應對方案  |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |

*[Please add or delete rows as appropriate請按需要增加或刪減列數]*

|  |
| --- |
| **(V) Cross-sector Collaboration 跨界別協作** (If the current collaboration status of the below mentioned collaborator is “Collaboration Confirmed”, please provide the signed “Appendix: Declaration and Consent of the Partnership / Collaboration / Support to the Applicant / Organisation” of each of them.)（如下列協作伙伴合作現況為「已獲確認」，請提交該協作伙伴所簽妥之「附件︰與申請人／機構有合作關係的聲明及同意書」。） (Please provide details of potential collaborators e.g. business partners, non-governmental organisations, schools, customers, service users etc. in order to make good use of social capital to create an impactful and sustainable social venture business.)（請提供能擴大社會效益的潛在協作詳情，包括：商界伙伴、非政府組織、學校、客戶、服務使用者等之社會資本。） |
|  | Name of Potential Collaborators潛在協作伙伴名稱 | Details of Collaboration 協作內容 | Name of Contact負責人姓名 | Post Title 職位 | Please state the current collaboration status: Collaboration Confirmed / Under Discussion / To Be Discussed *[Please choose from the options provided]*請註明合作現況︰已獲確認／正在討論合作／將開展討論 *[請從選項選取適用者]* |
| *Example**例子* | *ABC Elderly Centre**ABC長者中心* | *Recruit elderly* *people and provide venues**招募長者參加者及提供場地* | *Mr Peter Chan**陳大文先生* | *Centre In-charge**中心主管* | *Collaboration Confirmed**已獲確認* |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |

*[Please add or delete rows as appropriate請按需要增加或刪減列數]*

* 1. **Social Impact and Return 社會效益及回報**

|  |
| --- |
| **(i) Social Impact Measurement (SIM) 社會效益量度[[5]](#footnote-5)** |
| Level層次 | Indicator指標 | Target目標 | Method of Measurement量度方法 |
|  | *Example* *例子* | *Elderly participants’ satisfaction of the programme**長者參加者對項目的滿意度* | *4.0/5* | *Survey**問卷* |
| 1 | Affective滿意度(e.g. Satisfaction with the programme, self-confidence, etc.)(例如︰對計劃的滿意度、自信等) |  |  |  |
|  |  |  |
| 2 | Knowledge / Skills Acquisition / Attitude Change知識或技能增長／態度改變 (e.g. Knowledge of the industry, computer skills, willingness to seek jobs)(例如︰對行業知識、電腦技能、願意找工作等) |  |  |  |
|  |  |  |
| 3 | Behavioural Change行為改變(e.g. frequency of applying new skills, actively search for jobs)(例如︰運用所學技能的次數、主動接觸不同種族的次數等)  |  |  |  |
|  |  |  |
| 4 | Social Return on Investment (SROI) 社會投資回報 |
| Category類別 | Applicable?是否適用？ | Specific Items and Calculations具體項目及計算方式 | Monetised Amount相等金額 |
| Actual Workfare / Subsidy for Key Beneficiaries實際支付於受惠群體的工資或津貼 | [ ]  Yes適用 |  | 港幣HK$  |
| Personal or Family Savings by Key Beneficiaries受惠群體所節省的個人及家庭開支 | [ ]  Yes適用 |  | 港幣HK$  |
| Social / Government Cost Savings為社會或政府節省之資源及開支 | [ ]  Yes適用 |  | 港幣HK$  |
| Human Resources / Social Capital Generated增加之人力資本和社會資本 | [ ]  Yes適用 |  | 港幣HK$  |
| Other Non-financial Benefits of Beneficiaries or Relevant Parties, e.g. Equivalent Advertising Value受惠者或相關對象非財務得益，如等效的廣告價值等 | [ ]  Yes適用 |  | 港幣HK$  |
| Other: Please specify其他：請註明\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | [ ]  Yes適用 |  | 港幣HK$  |
| * + 1. Sub-total

小計 | 港幣HK$  |
| (a) | (b) |  |
| Total Monetised Social Impact(refer to the above table) 可化作金錢計算的社會效益總額 | Initial Investment (or Requested Funding and Matching Fund Amount)初始投資(或申請資助及配對基金總額) | **Social Return on Investment (SROI)****社會投資回報率**  |
| 港幣HK$  | 港幣HK$  |  **1 :**  |
| **(ii) Other positive changes to be brought to society 其他為社會帶來的正面影響**(e.g. Increase of life satisfaction level, social capital accumulated for the beneficiaries.)（例︰生活滿意度提升、幫助受惠者累積的社會資本等。） |

* 1. **Capability of Project Team 團隊能力**

|  |
| --- |
| (I) Leadership and Experience 領導團隊及經驗(Please elaborate on the team’s leadership capabilities, previous experiences and duties.)（請闡述領導團隊成員的能力、經驗及分工等。） |
| (II) Network and Advisors網絡及顧問 **(Please provide the signed “Appendix: Declaration and Consent of the Partnership / Collaboration / Support to the Applicant / Organisation” from each advisor mentioned below.) （請提交以下每位顧問所簽妥之「附件︰與申請人／機構有合作關係的聲明及同意書」。）**(Please elaborate on the advisors’ professions, experiences and networks.)（請闡述顧問團隊的專業、經驗及網絡等。） |
|  | Name of Advisor顧問姓名 | Organisation / Company所屬機構／公司 | Post Title 職位 | Details詳情 |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |

*[Please add or delete rows as appropriate請按需要增加或刪減列數]*

1. **Track Record / Prototype Project Results項目過往紀錄／原型項目結果**

|  |
| --- |
| **(i) Brief Description簡介** (Please elaborate on the objective, target beneficiaries, implementation period, etc.)（請闡述過往紀錄／原型項目的目標、受惠對象、執行期等。） |
| **(ii) Outputs and Outcome成果及成效**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **Indicator****指標** | **Target****目標** | **Actual****實際** | **Complete-ness (%)****完成度 (%)** | **Implementation Period****執行期** |
| **Output****成果** | **#** | **Key Performance Indicators / Key Milestones and Activities關鍵績效指標／主要里程碑及活動** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| **Outcome (Social Impact)****成效****(社會效益)** | **1** | **Affective滿意度** |
|  |
| **2** | **Knowledge / Skills Acquisition / Attitude Change知識或技能增長／態度改變** |
|  |
| **3** | **Behavioural Change行為改變** |
|  |

 |
| **(iii) Reflections from Past Experience / Prototype Project 過往經驗／原型項目的反思**(Please provide the findings, learnings, challenges encountered and the corresponding solutions in your past experience / prototype project.)（請闡述你在過往經驗及原型項目中的發現、學習、曾面對的挑戰及解決方案等。） |

**Social Innovation and Entrepreneurship Development Fund社會創新及創業發展基金**

**Innovator Farm創新園**

**Appendix: Declaration and Consent of the Partnership / Collaboration / Support to the Applicant / Organisation附件︰與申請人／機構有合作關係的聲明及同意書**

本人／本機構樂意成為\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(項目名稱)的**合作伙伴／協作機構／顧問／其他** （請註明：\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_）並同意\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_（申請人／機構名稱）於社會創新及創業發展基金項目申請書中表明上述的合作關係。

I am / Our organisation is delighted to be the partner / supporting organisation / advisor / other (*please specify:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_) of the project \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (*project title*) and agree \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(*name of applicant*) to feature the above partnership / collaboration / support in the funding application of the project to the Social Innovation and Entrepreneurship Development Fund.

|  |  |  |
| --- | --- | --- |
|  | 個人/負責人簽名︰Signature of Individual / Responsible Officer: |  |
|  | 個人/負責人姓名︰Name of Individual / Responsible Officer: |  |
|  |  | *(請用正楷填寫 in block letters)* |
|  | 職位︰Post Title: |  |
|  |  |  |
|  | 機構名稱及印章 (如適用)︰Name and Company Chop of Organisation (if applicable): |  |
|  |  |  |
|  | 日期︰Date: |  |

1. Key Performance Indicators refers to the measurement of performance or productivity to track the progress of predetermined goals or objectives, for example, to have 50 elderly people participated in training course. 關鍵績效指標是衡量項目工作績效表現的具體量化指標，例如：50名長者參加培訓課程。 [↑](#footnote-ref-1)
2. Key Milestones and Activities refers to the events or activities that are reached or attained to specific predetermined goals or objectives, for example, “recruitment of elderly participants and launch of the training course” are the key milestones or activities to complete to reach the goals. 主要里程碑及活動是指能達到項目目標之事件及活動，例如：招募長者參加者 及 啟動培訓課程 為該階段須進行的事件及活動。 [↑](#footnote-ref-2)
3. Please refer to footnote in B. Summary of Key Performance Indicators. 請參閱B. 關鍵績效指標概要。 [↑](#footnote-ref-3)
4. Please refer to footnote in C. Key Milestones and Activities. 請參閱C. 主要里程碑及活動概要之註腳。 [↑](#footnote-ref-4)
5. 更多資料可瀏覽[賽馬會豐盛社會效益量度培訓計劃](https://www.hksim.hk/learningmaterials)網站。
Please refer to [Jockey Club Fullness Social Impact Measurement Coaching Scheme](https://www.hksim.hk/learningmaterials?lang=en) website for more details. [↑](#footnote-ref-5)