

THE SIR ROBERT HO TUNG CHARITABLE FUND

Origin

The late Sir Robert Ho Tung bequeathed \$500,000 in 1956 to constitute The Sir Robert Ho Tung Charitable Fund. Since 1960, donations have been made annually to charitable objects of the organisations specified in the late Sir Robert Ho Tung's Will and other charities. The Fund is managed by the HSBC Trustee (HK) Ltd.

Donation

2. In accordance with the late Sir Robert Ho Tung's Will, income of the Fund shall apply as donations to such charitable objects as the Chief Executive of the HKSAR considers to be deserving causes. In recent years, the income available for donation has been around \$12 million per annum.

3. According to the criteria agreed between the Government and the Trustee, the charitable objects shall be those for the relief of poverty, prevention of sickness and those benefiting the elderly, persons with disabilities and under-privileged. Please see the **Allocation Criteria** at Annex B for details.

4. The late Sir Robert Ho Tung instructed that charitable objects put forward by the following organisations should normally receive priority:

- (a) Tung Wah Group of Hospitals
- (b) Po Leung Kuk
- (c) Hong Kong Tuberculosis, Chest and Heart Diseases Association
- (d) Hong Kong Society for the Protection of Children
- (e) Society for the Prevention of Cruelty to Animals (Hong Kong)
- (f) Hong Kong Red Cross
- (g) The Family Planning Association of Hong Kong
- (h) Hong Kong Family Welfare Society
- (i) Hong Kong St. John Ambulance
- (j) The Salvation Army

Application

5. An allocation exercise is organised annually, inviting applications through Government bureaux/ departments.

The Sir Robert Ho Tung Charitable Fund
Allocation Criteria

1. The charities nominated by the late Sir Robert Ho Tung should receive no less than 25% of the funds available; the top three charities should receive no less than 12.5%;
2. Priority should be given to those for relief of poverty and prevention of sickness, for applications from the nominated charities;
3. For applications from organisations other than the nominated charities, priority should be given to those for the elderly, persons with disabilities and under-privileged;
4. Priority should be given to capital projects and purchase of durable equipment;
5. Priority should be given to small organisations providing valuable community services but having limited financial resources;
6. Priority should be given to large-scale applications;
7. Priority should be given to applicants with a good track record of carrying out approved applications;
8. Low priority should be given to organisations not having tax-exemption status under the Inland Revenue Ordinance (Cap. 112); and
9. Low priority should be given to projects likely with alternative sources of funding.

The Organisations specified by the late Sir Robert Ho Tung

| <i>Organisation</i> | <i>Applications invited by</i> |
|---|--|
| 1. Tung Wah Group of Hospitals - Medical - Non-medical | Hospital Authority Social Welfare Department |
| 2. Po Leung Kuk | Social Welfare Department |
| 3. The Hong Kong Tuberculosis, Chest and Heart Diseases Association | Hospital Authority |
| 4. Hong Kong Society for the Protection of Children | Social Welfare Department |
| 5. Society for the Prevention of Cruelty to Animals (Hong Kong) | Agriculture, Fisheries and Conservation Department |
| 6. Hong Kong Red Cross | Hospital Authority, Social Welfare Department |
| 7. The Family Planning Association of Hong Kong | Home and Youth Affairs Bureau, Social Welfare Department |
| 8. Hong Kong Family Welfare Society | Social Welfare Department |
| 9. Hong Kong St. John Ambulance | Department of Health |
| 10. The Salvation Army | Social Welfare Department |