



投委會 理財教育獎  
IFEC FINANCIAL EDUCATION  
CHAMPION 2021

報名須知

APPLICATION  
GUIDE



# INTRODUCTION

## 簡介

Financial education (FE) is a process intended to increase the financial literacy of people. With improved financial literacy, they can manage their money better, and thus FE helps improve their financial well-being.

Hong Kong has witnessed an increasing and diverse range of FE initiatives. To recognise organisations that have enhanced FE in Hong Kong, the Investor and Financial Education Council (IFEC) introduced the "Financial Education Champion" (FEC) award scheme in 2018. All supporting organisations of the Financial Literacy Strategy are invited to submit applications. For more information about the strategy, please refer to IFEC website at <https://www.ifec.org.hk>.

推動理財教育，旨在提高市民理財能力的水平。有更佳的理財能力，可讓他們更妥善管理金錢，因此，理財教育有助促進個人財務健康。

香港的理財教育活動持續增加及愈趨多元化。為表揚機構推動本地理財教育的貢獻，投資者及理財教育委員會（投委會）今年續辦「理財教育獎」，誠邀各「理財能力策略」的支持機構報名參加。如欲進一步了解「理財能力策略」的資料，請瀏覽投委會網頁 <https://www.ifec.org.hk>。

## Working together to improve financial literacy and enhance financial well-being of Hong Kong people

攜手提升理財能力 改善香港市民的福祉

# WHAT IS A FINANCIAL EDUCATION CHAMPION

## 關於理財教育獎

The two critical concepts contained within the titular award, "financial education" and "champion", carry equal weight. "Champion" refers not only to the title holder but could also be a person or an organisation which supports or promotes a cause or a principle. These are the groups of people that excel at contributing to the driving force of the development and improvement of overall financial literacy in Hong Kong.

### Objectives

In order to harness enthusiasm and efforts of organisations seeking to improve the financial literacy of Hong Kong people, the FEC aims to:

- recognise organisations that have advanced FE in Hong Kong;
- recognise organisations that have provided quality FE;
- encourage organisations to further their FE efforts in Hong Kong; and
- attract more organisations to provide FE in Hong Kong.

### Eligibility

Organisations that are Financial Literacy Strategy's supporting organisations are welcome to submit applications. Each organisation can only submit one application with one FE initiative (application with more than one initiative may be disqualified). The initiative can be either solely organised or jointly organised with other organisation(s). The role of the applicant could include funding, organising, producing and/or developing the FE initiative.

If you are not a supporting organisation yet, please email to [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk) for more details. It will usually take around 3-week time for processing application for being a Financial Literacy Strategy supporting organisation.

「理財教育獎」的成立並不是為標榜單一個人或機構在理財教育上的成就，更重要的是表揚一群以推動及提升香港理財能力為共同目標及作出貢獻的夥伴。

### 目的

為凝聚一眾機構在提高香港人的理財能力上的熱忱及努力，「理財教育獎」旨在：

- 嘉許推動香港理財教育的機構；
- 嘉許在香港提供優質理財教育的機構；
- 鼓勵機構繼續加強在香港理財教育上的工作；以及
- 吸引更多機構在香港推動理財教育。

### 報名資格

歡迎所有「理財能力策略」的支持機構報名，提交機構的理財教育方案。每個組織只能提交一份申請，每份申請表只可提交一個理財教育方案，如提交多於一個方案，參加資格可以被取消。有關方案可以由報名機構獨自舉辦或與其他機構合作。報名機構可以是方案的出資者、主辦方或策劃人等。

查詢如何成為「理財能力策略」的支持機構，請電郵至 [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk)。成為支持機構的申請一般需時約三星期辦理。

## Prize

Awarded organisations will be:

- presented with an acknowledgement to recognise their commitment to promoting financial education;
- invited to the Award Presentation Ceremony; and
- eligible to use the award designation on branding or promotion materials for one year.

## Assessment Criteria

### Financial Education Champion Award (FEC)

- The FE initiative should enhance the financial literacy level (i.e. a person's ability to manage personal finance and make informed financial decisions) of the general public, employees, NGO's service users, customers, students, etc. in Hong Kong and appropriate evaluation results, if available, should be provided to demonstrate this.
- The content of the FE initiative must relate to at least one of the seven core competency elements as defined in the Hong Kong Financial Competency Framework. Please refer to page 8 of this guide for the details.
- The FE initiative has been delivered during the period from 1 July 2019 to 30 June 2020. Any FE initiative that is under development will not be assessed.
- The FE initiative should not contain sales and marketing of products or services.
- The FE initiative should be provided on a complimentary basis. In case a nominal charge is being levied, evidence must be provided to prove that the charge is on a non-profit making basis.
- The FE initiative should not be fully funded by IFEC or be an IFEC delivered education programme (please refer to [IFEC website](#) for a list of IFEC education programmes).

## 獎項

得獎機構將會獲以下嘉許：

- 獲頒發嘉許獎座，表揚機構在推動理財教育上的貢獻
- 獲邀出席頒獎典禮；以及
- 獲授權在機構的宣傳物品上展示其得獎的身份，為期一年。

## 評審準則

### 理財教育獎

- 理財教育方案須有效提升香港人的理財能力水平（即一個人為自身作出有根據和負責任的財務決定的能力），對象可為香港的公眾、員工、社福機構服務使用者、顧客、學生等人士。機構需盡量提供有關資料證明。
- 理財教育方案內容必須與香港理財能力架構的七個能力要素中最少一個相關。詳情可參閱本須知第八頁。
- 理財教育方案必須在 2019 年 7 月 1 日至 2020 年 6 月 30 日期間實行，任何準備或籌辦中的方案將不會被考慮。
- 理財教育方案不能包含任何產品或服務的營銷及推廣成份。
- 理財教育方案應為免費。如有象徵式的收費，機構需要提供資料證明費用以非牟利原則收取。
- 理財教育方案不可以是由投委會全數資助或提供的教育計劃。有關投委會提供的教育計劃，請瀏覽我們的[網頁](#)。

### Financial Education Champion- Quality Award (FEC-Q)

The FEC-Q further recognises organisations in providing FE initiatives that raise the quality of FE in Hong Kong and are committed to on-going monitoring of effectiveness. Applicants are required to submit additional information in section 8 of the application form.

The application should be able to provide evidence that evaluation has been conducted to assess the effectiveness of the FE initiative. Additional assessment criteria of FEC-Q are as follows:

- Success measures: Success measures are well defined and are in line with the FE initiative's objectives.
- Evaluation design: The evaluation design and methodology are rigorous and technically sound.
- Evaluation findings: The evaluation generates actionable learnings. (Note: demonstration of positive impact is NOT an assessment criterion.)

To understand more about the above areas, please refer to ["The Practical Guide to Evaluating Financial Education Programme in Hong Kong"](#) at IFEC website.

Previous winners of FEC-Q cannot re-submit the same initiative.

### Financial Education Champion- Insurance Award (FEC-I)

In collaboration with the Hong Kong Federation of Insurers (HKFI), the finalists of the Outstanding Financial Education Award of the Hong Kong Insurance Awards (HKIA) will receive the FEC-I awarded by the IFEC, except those organisations that have already been awarded FEC 2020 with the same FE initiative. Further details regarding the enrolment will be announced by the HKFI.

### Judging

The Judging Panel is formed by members of the IFEC Board of Directors. Please refer to <https://www.ifec.org.hk> for the member list. Members of the Judging Panel will declare conflict of interest should they have linkage with any of the applications. The Judging Panel has the sole discretion on the final assessment results.

### 理財教育獎—質量

理財教育獎—質量是為進一步表揚在香港提供理財教育並提升質素的機構而設。申請者不需另外提交申請，但需於申請表內第八項提供進一步資料。

申請機構須於報名表內提供有關理財教育方案的評估資料，以證明其方案的有效性，並致力持續進行評估。此獎項的額外評審準則如下：

- 衡量成功的指標：指標應有明確定義並符合理財教育方案倡議的目標。
- 評估設計：評核的設計及方法需嚴謹且合理。
- 評估結果：評估結果能對加強理財教育方案的成效有所啟示。（注意：提供方案的正面結果並不屬於評估範圍。）

如欲了解更多有關資料，請參閱投委會網站內的「[香港理財教育計劃成效評估指南](#)」（只有英文版）。

歷屆理財教育獎—質量得獎機構不可再以得獎方案遞交申請。

### 理財教育獎—保險

此外，投委會今年與香港保險業聯會（保聯）合作，於香港保險業大獎中獲得傑出理財教育獎的得獎機構，將會獲得由投委會頒發的理財教育獎—保險，憑同一理財教育方案獲得理財教育獎 2020 的機構除外。保聯將公佈進一步詳情。

### 評審團

評審團由投委會董事局成員組成，名單可瀏覽 <http://www.ifec.org.hk>。如果評審團的成員與任何申請機構有聯繫，他們需申報利益，評審團就評審結果擁有最後決定權。

## Application Procedures

Please submit your application by one of the following methods:

### ✉ POST

Please prepare TWO copies of completed application form and supporting materials to:

Investor and Financial Education Council  
21/F Cheung Kong Center  
2 Queen' s Road Central  
Hong Kong  
Re: Financial Education Champion Submission 2021

### @ EMAIL

Please email to [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk), and mark "Financial Education Champion Submission 2021" in email subject. Application form can be downloaded at <https://www.ifec.org.hk/fec>.

Application materials should be in WORD, PDF or JPEG format. Please keep the file size of each email submission under 10M to ensure successful submission. In case it exceeds 10M, please send attachments separately in limited size emails; or submit by post.

- Applicant must ensure all information submitted is intact, accurate and factual.
- Application is free of charge.
- Please don't submit duplicate application in both email and post.

## Enquiries

For enquiries, please email to [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk). Applicants who do not receive our award confirmation by 31 October, 2020 can assume their applications unsuccessful.

## 報名程序

請選擇以下其中一種報名方法：

### ✉ 郵寄

請準備一式兩份的報名表格及相關資料文件至：

投資者及理財教育委員會  
香港皇后大道中 2 號  
長江集團中心 21 樓  
註明「理財教育獎 2021」

### @ 電郵

電郵至 [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk)，標題請註明「理財教育獎 2021」。表格可於投委會網頁 <https://www.ifec.org.hk/fec> 下載。

以電郵提交的資料需為 WORD，PDF 或 JPEG 格式。為確保遞交順利，每封電郵附件檔案大小請在 10M 以下。如有超過 10M 情況，請分開多封電郵傳送，或郵寄遞交。

- 報名機構須確保所遞交的資料是完整、準確及真實。
- 免費報名。
- 請勿重複以電郵及郵寄遞交申請。

## 查詢

查詢報名詳情，請電郵至 [flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk)。如於 2020 年 10 月 31 日仍未收到得獎通知，即代表是次申請未能獲獎。

## Important Dates 重要日期

Submission deadline: 3 July 2020  
截止報名日期：2020 年 7 月 3 日

Award presentation: Last quarter of 2020  
頒獎：2020 年第四季

# HONG KONG FINANCIAL COMPETENCY FRAMEWORK

## 香港理財能力架構

The Hong Kong Financial Competency Framework (FCF) identifies a comprehensive set of knowledge, skills, attitudes, motivations and behaviour required for financial literacy. It presents the financial competencies that a person at different life stages should ideally possess. There are seven core competency elements regarding the knowledge and skills required for financial literacy defined in the FCF.

### Money & banking

The nature of money and how the banking system works

### Income & taxation

Earning money and people's obligations to society

### Saving & investing

Creating wealth for financial goals

### Spending & credit

Using money that a person has or may need to borrow

### Consumer rights & responsibilities

Consumer protection system and what constitutes a responsible consumer

### Financial planning

Planning for the future use of money

### Protection & risk

Managing possible financial losses

For details of the FCF, please visit IFEC website at <http://www.ifec.org.hk>.

「香港理財能力架構」闡述理財能力所涵蓋的範圍，包括知識、技能、態度、動機及行為多方面。架構描述一個人在不同的人生階段中，應該擁有的理財能力。為釐定理財能力所需的知識與技能，架構羅列了七個能力要素。

### 金錢和銀行

金錢的性質和銀行體系的運作

### 收入和稅項

賺取金錢及市民對社會的義務

### 儲蓄和投資

創造財富以達到財務目標

### 開支和信貸

使用本身擁有或由借貸而來的金錢

### 消費者權利和責任

消費者保障制度及如何成為負責任的消費者

### 財務策劃

策劃未來的財務安排

### 保障和風險

管理潛在的財務損失

有關「香港理財能力架構」進一步資料，請瀏覽投委會網頁 <http://www.ifec.org.hk>。





# APPLICATION FORM

## 報名表格

Submission Deadline  
截止報名日期

**3/7/2020**

| PART 1<br>第一部份   |  | COMPANY/ORGANISATION DETAILS<br>公司 / 機構資料 |
|--|--|---|
| Company / Organisation Name 公司 / 機構名稱  |  |   |
| (English)  |  |   |
| (中文)   |  |   |
| Business Nature<br>業務性質  |  |   |
| Website 網址   |  |   |
| Contact Person Details 聯絡人資料   |  |   |
| Title 稱謂 <input type="checkbox"/> Mr 先生 <input type="checkbox"/> Ms 女士 <input type="checkbox"/> Others, please specify 其他，請列明： |  |   |
| Name 名稱  |  |   |
| Position 職銜  |  |   |
| Telephone 電話   |  |   |
| Email 電郵   |  |   |
| Mailing Address<br>郵寄地址  |  |   |

1. Name of the initiative 方案名稱

|  |
|--|
|  |
|--|

Date 日期

Start from 由：

To 至：

2. What competency element(s) as defined in the Hong Kong Financial Competency Framework (Page 8 of the application guide) is the initiative related to? (Must cover at least one element)

方案有關哪項香港理財能力架構的能力要素（報名須知第八頁）？（須選最少一項）

- Money & banking 金錢和銀行
- Income & taxation 收入和稅項
- Saving & investing 儲蓄和投資
- Spending & credit 開支和信貸
- Consumer rights & responsibilities 消費者權利和責任
- Financial planning 財務策劃
- Protection & risk 保障和風險

3. What is/are the nature of initiative? 方案是以下哪項 / 多項性質？

- Talk / seminar / course / workshop 講座 / 研討會 / 課程 / 工作坊
- Event / exhibition / fair 大型活動 / 展覽 / 市集
- Online tools / website / App 網上工具 / 網頁 / 應用程式
- Media production (video, audio) 媒體影音製作
- Social media / blog 社交媒體 / 網誌
- Printed matters 印刷品
- Research study / report 專題研究 / 報告
- Others, please specify: 其他，請註明：

\_\_\_\_\_

4. Who is/are the target audience of the FE initiative? 誰是目標受眾？

|  |
|--|
|  |
|--|

5. Please provide a short description of how the initiative had been implemented.  
請闡述方案如何實行。

6. What is the role(s) of your company/organisation in implementing the initiative?  
For joint submission, please list out respective roles for each company/organisation.  
貴公司 / 機構在方案中擔當什麼角色？如果是合辦活動，請列明各機構所擔當的角色。

7. Did participants need to pay any fee? 參加者是否需要付費參加？

- No fee was involved 不需要付費
- Fee was involved 需要付費
- For nominal charge, please provide evidence that the charge is made on a non-profit making basis. 如有象徵式收費，請附上非牟利收費說明。

8. Have you conducted any evaluation exercise to assess effectiveness of the FE initiative?  
貴公司 / 機構是否有就提交的方案進行評估，以證明其有效性？

Yes 有       No 沒有 (Please go directly to section 9 請直接回答第 9 項)

8a. Which evaluation design/elements did you adopt?  
貴公司 / 機構採用了以下那些方法進行評估？

- Pre-post surveys 方案進行前後對比調查
- Post-only surveys 方案進行後作調查
- Focus groups/interviews 聚焦小組 / 訪問
- Others, please specify 其他，請註明：  
\_\_\_\_\_

8b. What are the key success measures and learnings?  
衡量成功的主要指標是什麼？對日後的理財教育方案有什麼啟示？

8c. Please check the box  if you would like to apply for the FEC-Q. Please refer to p.6 of the application guide for additional assessment criteria of FEC-Q.  
如你希望同時參合理財教育獎—質量的甄選，請勾選此方格 。有關理財教育獎—質量的額外評審準則，請參閱報名須知第六頁。

9. Please list out the supporting materials to be submitted in this application. (If applicable)  
請列出提交的補充資料文件。(如適用)

Our company/organisation hereby agrees and declares that (please read carefully before checking all the boxes):

- The submitted initiative does not contain any sales and marketing of products or services.
- All information provided in this form is true and accurate.
- The Investor and Financial Education Council (IFEC) can use the information in this form for data analysis on a collective basis for future development of the Financial Education Champion (FEC).
- All decisions made by the IFEC regarding the eligibility of our company/organisation are final.

本公司 / 機構謹此同意並聲明（請於勾選所有空格前細閱內容）：

- 於本表格提交的方案沒有包含任何產品或服務的營銷及推廣成份。
- 於本表格提供的資料均為真實及正確。
- 投資者及理財教育委員會（投委會）可使用本表格載列的資料進行整體分析，作日後「理財教育獎」發展之用。
- 投委會所作有關本公司 / 機構是否符合資格的決定為最終決定。

\_\_\_\_\_  
Name of Signatory  
代表姓名

\_\_\_\_\_  
Signature  
簽署

\_\_\_\_\_  
Position 職銜

\_\_\_\_\_  
Date 日期

\_\_\_\_\_  
Company/Organisation Chop 公司 / 組織蓋印

**Personal Information Collection Statement**

1. This Personal Information Collection Statement is made in accordance with the guidelines issued by the Privacy Commissioner for Personal Data. It sets out the purposes for which your Personal Data<sup>1</sup> will be used following collection, what you are agreeing to with respect to the IFEC's use of your Personal Data and your rights under the Personal Data (Privacy) Ordinance (Cap. 486) (PDPO).

**Purpose of collection**

2. Your provision of Personal Data is on a voluntary basis. The Personal Data provided in this form will only be used for the purpose of processing your application for the FEC.

**Transfer of personal data**

3. IFEC will not disclose or transfer your personal data to third parties without your consent.

**Access to data**

4. You have the right to request access to and correction of your Personal Data in accordance with the provisions of the PDPO. Your right of access includes the right to obtain a copy of your Personal Data provided in your submission on this application form. The IFEC has the right to charge a reasonable fee for processing any data access request.

**Retention**

5. Personal Data provided to the IFEC in your submission on this application will be retained for such period as may be necessary for the fulfilment of the above-stated purpose(s) (including any directly related purpose).

**Enquiries**

6. Any enquiries regarding the Personal Data provided in your submission on this application, or requests for access to Personal Data or correction of Personal Data, should be addressed in writing to: Data Privacy Officer, Investor and Financial Education Council, 21/F, Cheung Kong Center, 2 Queen's Road Central, Hong Kong.

<sup>1</sup> Personal Data means personal data as defined in the Personal Data (Privacy) Ordinance (Cap. 486)

**個人資料收集聲明**

1. 本個人資料收集聲明是按照個人資料私隱專員發出的指引編寫而成。本聲明列出投委會收集你的個人資料<sup>1</sup>的用途、你就投委會使用你的個人資料而同意的事項，以及你根據《個人資料（私隱）條例》（第486章）（「《私隱條例》」）享有的權利。

**收集資料的目的**

2. 你個人資料的提供是屬於自願性質。投委會在處理「理財教育獎」申請時，使用你就申請向投委會所提供的個人資料。

**轉移個人資料**

3. 投委會不會在未經你同意前把你就本申請向投委會所提供的個人資料轉移至第三方人士。

**查閱資料**

4. 按照《私隱條例》的規定，你有權要求查閱及修正你的個人資料。上述權利包括你有權索取你就本申請向投委會所提供的個人資料的副本。投委會有權就處理任何查閱資料的要求收取合理的費用。

**保留資料**

5. 投委會保留就申請而提供予本機構的個人資料，保留時間為直至完成以上提述的目的（包括任何直接有關的目的）所需的時間為止。

**查詢**

6. 有關就本申請所提供的個人資料的任何查詢，或查閱或修正個人資料的要求，請以書面形式向以下人士提出：

香港皇后大道中 2 號長江集團中心 21 樓  
投資者及理財教育委員會  
個人資料隱私主任

<sup>1</sup> 個人資料指《個人資料（私隱）條例》（第486章）所界定的「個人資料」。

**Submission 遞交方法**

**Email 電郵**

[flstrategy@ifec.org.hk](mailto:flstrategy@ifec.org.hk)

**Post 郵寄**

Investor and Financial Education Council  
21/F Cheung Kong Center  
2 Queen's Road Central, Hong Kong  
Re: Financial Education Champion 2021 Submission

投資者及理財教育委員會  
香港皇后大道中 2 號  
長江集團中心 21 樓  
「理財教育獎 2021」



# INVESTOR AND FINANCIAL EDUCATION COUNCIL

## 投資者及理財教育委員會

Established in 2012 and supported by the four financial regulators and Education Bureau, the Investor and Financial Education Council (IFEC) is a public organisation dedicated to leading financial literacy in Hong Kong. The IFEC promotes and delivers free and impartial financial education resources and programmes through its consumer education platform, The Chin Family, and leads the Financial Literacy Strategy to create a conducive environment for stakeholders to deliver more quality financial education to various segments of the Hong Kong population.

投資者及理財教育委員會（投委會）於 2012 年成立，是專責帶領香港理財能力發展的公營機構，並獲四家金融監管機構及教育局支持。投委會透過消費者教育平台「錢家有道」推廣及提供免費的理財教育資源及計劃，並帶領「理財能力策略」為持份者締造有利環境，從而為香港不同群組提供更多優質的理財教育。

