

**Digital Inclusion Programme for the Elderlies under the  
Social Innovation and Entrepreneurship Development Fund**

**Invitation Brief**

**Issued by**

The Trustee of the Social Innovation and Entrepreneurship  
Development Fund

August 2024

## **Table of Content**

<b>I.</b>	<b>Purpose</b>	<b>3</b>
<b>II.</b>	<b>Objective</b>	<b>3</b>
<b>III.</b>	<b>Background</b>	<b>3</b>
<b>IV.</b>	<b>Project Requirements</b>	<b>4</b>
<b>V.</b>	<b>Key Performance Indicators</b>	<b>7</b>
<b>VI.</b>	<b>Submission of Proposals</b>	<b>8</b>
<b>VII.</b>	<b>Assessment of Proposals</b>	<b>10</b>
<b>VIII.</b>	<b>Key Engagement Terms</b>	<b>11</b>
<b>IX.</b>	<b>Briefing</b>	<b>14</b>
<b>X.</b>	<b>Enquiries</b>	<b>14</b>

**Annex 1 – Template for Project Implementation Plan Proposal**

**Annex 2 – Template for Budget Proposal**

## **I. Purpose**

The Government has announced in the 2024-25 Budget that the Social Innovation and Entrepreneurship Development Fund (SIE Fund) would allocate \$100 million to implement a territory-wide Digital Inclusion Programme for the Elderlies (DI Programme) by batches in the coming three years.

2. This Invitation Brief provides details on the application for funding under the DI Programme.

## **II. Objective**

3. The objective of the DI Programme is to enhance the capability of elderlies (aged 60 or above) in adopting digital technologies, ensuring that they have the basic knowledge and skills to utilise technology effectively and safely, and at the same time promoting social cohesion.

4. We expect the programme to benefit over 100 000 elderlies, in particular the singleton or doubleton elderlies living in the old districts and public housing who are not conversant with digital technologies. First batch of the programme is expected to commence by end-2024.

## **III. Background**

5. Launched in 2013, the SIE Fund seeks to drive social impact in alleviating poverty and social exclusion as well as fostering the well-being and cohesion of the society by promoting social innovation and nurturing social entrepreneurship. Four innovative projects promoting inter-generational digital inclusion were funded by the SIE Fund in September 2021, including launching of digital outreach rehabilitation services for the elderlies, training young people to teach elderlies the operations of tablet computers/ smartphones and mobile applications, engaging the elderlies after training to volunteer and introduce digital products to their fellows, etc. These four projects were completed by April 2024. A total of 650 young people participated in the projects, benefiting more than 4 800 elderlies.

6. The DI programme, in tandem with the existing digital inclusion measures under the Digital Policy Office (DPO)<sup>1</sup>, can create a robust ecosystem of support. By aligning with and complementing existing initiatives, the DI programme can

---

<sup>1</sup> In order to allow members of our society to enjoy the benefits of digital technology, DPO promotes various digital inclusion measures to help the elderlies to understand and use digital technology products and services so that they can use digital technologies effectively and safely, thereby fully integrate into the digital society, including the Information and Communications Technology (ICT) Outreach Programme for the Elderly; the Enriched ICT Training Programme for the Elderly; and a web-based learning portal. Details of the digital inclusion measures are available at the DPO's website at: [https://www.digitalpolicy.gov.hk/en/our\\_work/digital\\_government/digital\\_inclusion/](https://www.digitalpolicy.gov.hk/en/our_work/digital_government/digital_inclusion/).

leverage established networks, resources, and expertise. It can fill service gaps, target specific underserved communities or demographics, and pioneer innovative approaches that enhance the overall effectiveness of digital inclusion efforts.

#### IV. Project Requirements

7. We plan to engage and provide funding for 12 institutions/ organisations under the DI Programme. The engaged partners are responsible for the design and implementation of community-based projects for the target elderlies. The total number of the elderlies to be served and funding to be received by each engaged partner are set out in the table below.

	<b>Service Area<sup>2</sup></b>	<b>Target No. of Elderlies (Minimum)</b>	<b>Funding Amount (Maximum)</b>
Group A  <i>(Seven institutions/ organisations)</i>	Tsuen Wan and Kwai Tsing	10 000 elderlies per engaged partner	HK\$4.5 million per engaged partner
	Eastern and Wan Chai		
	Sai Kung and Tai Po		
	Kwun Tong		
	Sha Tin		
	Sham Shui Po and Yau Tsim Mong		
	Central and Western, Southern and Islands		
Group B  <i>(Five institutions/ organisations)</i>	Yuen Long	6 000 elderlies per engaged partner	HK\$2.7 million per engaged partner
	Tuen Mun		
	Wong Tai Sin		
	Kowloon City		
	North		

8. Each engaged partner is required to deliver the following –

##### (a) Provision of community help desk service

- To set up community-based help desks at suitable locations that are convenient to the target elderlies (e.g. community centres) and to be stationed with sufficient manpower (can be full-time/ part-time staff,

<sup>2</sup> Taking into consideration the district elderly population size and geographical location, we plan to engage 12 institutions/ organisations to cover all 18 districts and facilitate service planning and operation. Each service area may cover more than one district.

helpers or volunteers<sup>3</sup>) to provide regular and fixed-point technical support tailored to the specific needs of the elderlies.

- Staff, helpers and volunteers manning the help desk should be sufficiently knowledgeable and skilful to share with the elderlies on basic skills on digital technologies. Staff, helpers and volunteers of the help desk must wear standardised windbreakers, vests or T-shirt to be provided by the Trustee, along with proper identification at all times.
- To proactively engage with more target elderlies, encouraging their attendance at help desks through promotion and coordination with the venue owner to ensure a steady flow of visitors.

#### **(b) Training courses/ activities on the use of digital government services**

- To organise short-term training courses/ activities that could help the elderlies in enhancing their ability and quality of living, with a particular focus on the use of digital government services.
- Courses/ activities shall enable the elderlies in using daily life e-government services through mobile applications<sup>4</sup> (mobile apps), e.g. iAM Smart, HA Go and 18 CM Clinics of the Hospital Authority, My SmartPLAY, with real life scenarios to illustrate the benefits of using such mobile apps, as well as cybersecurity practices such as safeguarding against deception, social media scams, and managing suspicious calls. A set of standardised training materials shall be provided by the Trustee.
- Applicants/ engaged partners may propose additional training topics that would help equip the elderlies with the skills to utilise prevalent mobile apps for daily tasks, such as navigating food ordering applications for restaurants and takeaways, as well as accessing real-time arrival information for public transportation. Any additional training topic(s) and material shall be agreed with the Trustee before use.

#### **(c) Promotion and publicity**

- To devise publicity plan to promote the programme and reach out to the target elderlies.

---

<sup>3</sup> A minimum of at least two volunteers should be present at the help desk during each session where volunteers are involved.

<sup>4</sup> More examples of government mobile apps are available at <http://www.gov.hk/en/about/govdirectory/mobileapps.htm>

- To support the publicity events/ activities organised by the Government including but not limited to the following –
  - (i) A 2-day fun-day-cum-launching ceremony to be held in mid-December 2024 to announce the official launch of the DI Programme.
  - (ii) Other promotion/ publicity events/ activities, such as fun fair/ experience day/ roadshow, media pitching, video production, etc. to be held from time to time during project period.
- The Trustee will provide initial publicity materials, such as posters, leaflets, pamphlets, and souvenirs, for engaged partners to kick off the program (e.g. for distribution to participants or for display at various locations like offices, help desks, and service units). Engaged partners are responsible for reproducing these materials as necessary using the standard designs provided by the Trustee in digital format. Partners may also create their own promotional materials to align with their promotion plan and specific district circumstances to boost the promotional impact, subject to prior approval from the Trustee.

9. The services offered to the target beneficiaries should be provided free of charge.

10. When providing training or support to the elderlies, engaged partners must refrain from installing non-government mobile apps on the elderlies' smartphones. Additionally, the collection of personal data from the elderlies, such as their names, HKID No., telephone numbers, and addresses, should only occur when absolutely necessary and must strictly adhere to the requirements set out in paragraph 39 for handling personal data. Under no circumstances should engaged partners collect financial data like bank account information, passwords, ATM cards, or credit card details from the elderlies.

11. In addition to providing the basic support services outlined in paragraph 8 above, the applicants are required to propose innovative means to engage the target beneficiaries and maximise impact, such as –

- engaging young people to, through employment or volunteer work, make good use of their digital knowledge to help the elderlies enhance their knowledge and adoption of digital technologies; and
- implementing creative strategies to establish the community help desks by creating environments familiar to the elderlies (such as café, traditional Chinese restaurant etc.) to help them adapt more easily.

## V. Key Performance Indicators

12. Each engaged partner is required to deliver/ achieve the baseline performance in the engagement period of 24 months as shown in the following payment-linked Key Performance Indicators (KPIs) –

KPIs		Minimum Requirement	
1	No. of elderlies served (man-time <sup>5</sup> )	Each engaged partner under Group A: <u>At least 10 000</u>	Each engaged partner under Group B: <u>At least 6 000</u>
2	No. of help desk set up	<u>At least two</u> physical help desks set up in each of serving districts.	
3	No. of help desk sessions held	<u>At least 12 sessions per week</u> at each help desk, including – <ul style="list-style-type: none"> <li>- Monday to Friday: Two sessions per day</li> <li>- Saturday to Sunday: One session per day</li> </ul> Each session shall last for at least two hours.	
4	No. of training activities held	<u>At least two sessions per week</u> at each help desk.  Each session shall last for at least one hour.	
5	Satisfaction rate of the elderlies served	Each engaged partner shall collect post-activity survey response meeting <u>at least a 80% satisfaction rate</u> .	

13. The requirements set out above represent the minimum target of each engaged partner. Applicants must state clearly in their proposals the proposed KPIs. Extra marks will be awarded to proposals that propose/ achieve a higher target. Failure to meet the committed targets will lead to funding being withheld or reduced as per the predetermined arrangements set out in paragraph 32 below.

14. In addition to the baseline performance requirement set out in paragraph 12 above, each engaged partner is required to introduce to the target elderlies other

---

<sup>5</sup> Count of individuals participating in the help desk sessions and training activities. It refers to the elderlies successfully engaged as manifested by a meaningful communication with the staff/ volunteers and the completion of a post-activity survey.

digital inclusion programmes organised by the DPO, including the ICT Outreach Programme, Enriched ICT Training Programme and eLearning Portal, and further engage them as volunteers and encourage enrolment/ participation in these advanced programmes. By training elderlies to volunteers, the DI programme not only imparts valuable skills but also nurtures a sense of community engagement and empowerment, leveraging their experience and wisdom. Additionally, making referrals to other advanced programmes for further study ensures ongoing support for participants by providing a seamless transition and enhancing the sustainability of these efforts.

## **VI. Submission of Proposals**

### *Eligibility Requirements*

15. An applicant and its partnering organisation(s), if any, must be (a) an organisation registered on the list of charitable institution or trust of a public character exempted from tax under Section 88 of the Inland Revenue Ordinance (Cap. 112); or (b) an organisation registered as a society under the Societies Ordinance (Cap. 151); or (c) a company incorporated under the Companies Ordinance (Cap. 622) or its predecessor ordinance (Cap. 32); or (d) a statutory body established under any ordinances of Hong Kong.

16. An applicant must demonstrate track records in providing elderly services in the community in the past five years for which the expertise, experience and networks established are relevant to effective implementation of the DI Programme by submitting supporting documents together with the proposal.

17. An applicant must not be receiving financial support under other government funding for the same or part of the proposed project.

**18. Applicants that fail to comply with the requirements set out in paragraphs 15-17 above will not be further considered.**

### *Preparing the Proposal*

19. The proposal must include a detailed Project Implementation Plan and a comprehensive Budget Plan, with templates provided in Annex 1 and Annex 2 respectively. It is imperative that all information provided is accurate and complete.

20. The Budget Proposal should encompass only expenses directly related to the proposed project which may include –



(a) Capital Expenditure

- Renovation expenses for setting up the help desks
- Procurement costs for equipment

(b) Operating Expenses

- Salaries (including employer's contributions to the Mandatory Provident Fund)
- Volunteer allowances or travel subsidies (capped at HK\$70 per volunteer per activity session)
- Promotional and training material expenses
- External audit fees
- Rental expenses
- Insurance costs
- Central administrative overheads (not exceeding 5% of the budgeted expenditure from the SIE Fund)

21. Expenses on items such as mobile devices (including mobile data plan) for distribution to the target elderlies, overseas travel, food and beverages, and entertainment are not eligible for coverage under the funding from the SIE Fund.

*Submission Requirements*

22. Applicants may submit proposals for multiple service areas. However, multiple submissions for the same service area from a single applicant is not allowed. It should be submitted in one hardcopy set and one softcopy stored on a USB thumb-drive enclosed in a sealed plain envelope labelled "The Social Innovation and Entrepreneurship Development Fund - Proposal for the Digital Inclusion Programme for the Elderlies". In the event of any disparities between the hardcopy and the softcopy, the hardcopy shall prevail.

23. The proposal must be submitted by depositing in the collection box located at the Digital Policy Office, 14/F, Treasury Building, 3 Tonkin Street West, Cheung Sha Wan, Kowloon, not later than 6:00 p.m. on 13 September 2024 (Hong Kong Time and Date) or such other date as extended under paragraph 24 below (Proposal Closing Date). **Late submissions or proposals not complying with paragraph 22 above will not be considered further.**

24. If a black rainstorm warning or tropical cyclone warning signal No. 8 or above is hoisted between 9:00 a.m. and 6:00 p.m. on the Proposal Closing Date, the deadline for submission will be extended to 6:00 p.m. on the following working day.

25. After submission of the proposals, applicants shall not initiate any further contact, whether direct or indirect, with the Trustee on its proposals or this invitation

to submit proposals. Any further contact shall only be initiated by the Trustee. Except as requested by the Trustee, any further information relating to the proposals submitted to the Trustee after the Proposal Closing Date will not be considered.

## VII. Assessment of Proposals

26. The SIE Fund Secretariat will conduct preliminary screening for all proposals received to ascertain they are complete and can satisfy all the eligibility criteria set out in paragraphs 15-17 above, and score all eligible applications in accordance with the pre-defined assessment criteria outlined below. Proposals fail to obtain a minimum score of 50% in each of the six criteria will not be considered further.

Assessment Criteria	Maximum Score
<p>1. Vision and Strategic Direction</p> <ul style="list-style-type: none"> <li>This criterion assesses the clarity and alignment of the project’s goals with the Fund’s overall vision and strategy. It looks at how well the project aligns with long-term objectives and whether the vision is compelling and achievable.</li> </ul>	5
<p>2. Implementation/ Execution</p> <ul style="list-style-type: none"> <li>This criterion focuses on how effectively the project plan is executed. It includes aspects like recruitment, training and management of staff/ helpers/ volunteers, project management, resource allocation, timeline, and meeting KPIs/ deliverables.</li> <li>Risk management plan/ contingency plan for handling disputes and complaints, as well as data protection/ security.</li> </ul>	15
<p>3. Capability</p> <ul style="list-style-type: none"> <li>Capability refers to the skills, expertise, and resources available to carry out the project successfully. This criterion evaluates whether the project team has the necessary competencies, experience, and support to achieve the project goals.</li> </ul>	15
<p>4. Innovativeness</p> <ul style="list-style-type: none"> <li>This criterion examines the level of creativity, originality, and novelty in the project approach. It assesses whether the project introduces new ideas or methods that distinguish it from existing programme/ project.</li> </ul>	20

<b>Assessment Criteria</b>	<b>Maximum Score</b>
5. Social Impact <ul style="list-style-type: none"> <li>• Social impact evaluates the project’s effects on society, communities, and the specific target group. It looks at how the project contributes to positive change, addresses social issues, or improves the well-being of stakeholders.</li> </ul>	25
6. Cost Effectiveness <ul style="list-style-type: none"> <li>• Cost effectiveness assesses how efficiently resources are utilised to achieve project outcomes. It considers whether the project delivers value for money and whether the benefits justify the costs incurred.</li> </ul>	20
	<b>100</b>

27. The assessment results will be recommended to the Task Force (TF) for review. Appointment of the successful applicants will be made by the Trustee on the advice of the TF and approved by the Secretary-General of the SIE Fund Secretariat. We expect to announce the assessment results in around early November 2024.

28. The Trustee reserves the right, at its sole and absolute discretion, not to accept any proposal, or not to appoint any of the applicants for the whole or any part of the engagement. The Trustee is also under no obligation to review or discuss the assessment or assessment result of any proposal with any person.

### **VIII. Key Engagement Terms**

29. The Terms and Conditions (T&C) presented under this section, together with other requirements set out in this Invitation Brief will be incorporated as part of the Funding Agreement with the successful applicant. The Trustee reserves the right to modify any of its T&C but is not obliged to do so.

#### *Engagement Period and Payment Arrangement*

30. The DI Programme shall commence by end 2024 and be completed within a period of **24 months** from the commencement date of the Funding Agreement made between the Trustee and the successful applicant.

31. The funding payable to the engaged partners by the Trustee for implementing the DI Programme shall be made in periodic instalments, subject to the partners’ satisfactory performance and compliance with relevant T&C in the Funding Agreement. The payment will comprise an initial payment which amounts to 20% of the total funding and four regular instalment payments on a half yearly basis each

amounting to 20% of the total funding. Details of the payment schedule is shown below –

<b>Payment Type (Instalment)</b>	<b>Report Cut-off Date</b>	<b>Criteria for Payment</b>	<b>Payment Amount (% of total funding)</b>
Initial payment (1)	N/A	Upon signing of the Funding Agreement	20%
Regular payment (2)	Month 6	Upon acceptance of half yearly operation and financial reports by the Trustee. Each reporting period should achieve the following –  <ul style="list-style-type: none"> <li>• Completion of at least 25% of the committed no. of elderlies served (KPI 1); and</li> <li>• Full completion of KPI 2 to KPI 5.</li> </ul>	20%
Regular payment (3)	Month 12		20%
Regular payment (4)	Month 18		20%
Regular payment (5)	Month 24		20%

32. The Trustee reserves the right to withhold or reduce payment, and/ or require the engaged partner to refund all or part of the funding that has been paid to the partner. Among the total funding allocated, 20% constitutes the initial payment (instalment 1) designated for engaged partners to initiate the programme (e.g. assembling the project team, establishing necessary facilities and commencing promotional efforts, etc.). The balance of the funding is earmarked for the effective execution of the programme to support the elderlies across four stages. Regarding this remaining sum, 80% of the payments will be contingent upon meeting specified KPIs. The engaged partner must meet the payment-linked KPIs as stipulated in paragraph 12 and stage achievements as shown in paragraph 31 above, failing which will be subject to withholding of certain amount of funding from the instalment payment or even deduction of the funding at the end of the programme period based on the formula below –

Amount to be withheld from the payment for not meeting payment-linked KPIs	$= \frac{\text{Committed KPI} - \text{Actual}}{\text{Committed KPI}} \times \text{Weighting } (\%)^{\text{a}} \times \text{Instalment payment}$
--	---

@ For the five (5) payment-linked KPIs, their weighting on payment is as below –

<b>KPIs</b>		<b>Weighting</b>
1	No. of elderlies served	40%
2	No. of help desk set up	10%
3	No. of help desk session held	10%
4	No. of training sessions/ activities held	10%
5	Satisfaction rate of the elderlies served	10%
<b>Total</b>		<b>80%</b>

33. The overall amount to be released/ deducted will be calculated at the end of the engagement period taking into account the level of KPIs achieved and amount withheld (if applicable) in instalment payment.

*Performance Monitoring, Financial Controls and Reporting*

34. The engaged partners are required to submit periodic operation reports and financial reports following the timeline as stipulated in the table under paragraph 31 above and in the format as advised by the Trustee, as well as ad hoc reports (e.g. monthly statistics, and event progress, etc.) as requested by the Trustee. The information presented in the reports must be accurate and substantiated.

35. The engaged partners shall maintain full and proper books of accounts and records in respect of the use of the SIE Fund and submit periodic financial reports and audited annual financial reports to the Trustee in accordance with the requirements set out in the Funding Agreement.

36. The engaged partners shall keep a separate designated bank account solely for the receipt and/ or disbursement of funds under the DI Programme.

37. The engaged partners may accept other source of funding, such as sponsors or donations, but must ensure that any T&C imposed by the funders, sponsors, donors, etc. are consistent with the objectives of the SIE Fund, the DI Programme and the T&C of the Funding Agreement. Sponsorship (in cash or in kind), donations or other courtesy arrangements from, nor be in association in any form or manner with, any person in the tobacco, alcohol, pornography or gambling industry, or any other industry which, in the reasonable opinion of the Government, may jeopardise the image or reputation of the Government shall not be accepted.

*Compliance with Laws of Hong Kong*

38. The applicants/ engaged partners shall strictly observe and comply with all applicable laws (including, without limitation, the Law of the People's Republic of

China on Safeguarding National Security in the Hong Kong Special Administrative Region) and regulations of Hong Kong. All the proposed events/ activities/ manpower deployment for the implementation of the DI Programme shall comply with all laws, regulations and judicial requirements.

39. The engaged partners shall ensure data security and prevent any possible leakage of personal data collected by taking all necessary steps and security measures (including but not limited to (i) full compliance of the Personal Data (Privacy) Ordinance (Cap. 486), (ii) conduct of privacy impact assessment and security risk assessment and audit, (iii) data encryption, and (iv) retention and disposal policy).

## **IX. Briefing**

40. A briefing session on the invitation for proposal for the DI Programme will be conducted with details as follows –

Date : 23 August 2024 (Friday)

Time : 3:30 p.m.

Format : Hybrid (physical and virtual)

- Physical: idea Rooms, 15/F, Treasury Building, 3 Tonkin Street West, Cheung Sha Wan, Kowloon
- Virtual: Meeting link will be provided to the enrolled applicants.

41. Organisations interested in attending the briefing session please complete the enrolment form and return it to SIE Fund Task Force Secretariat by email ([cpyng@digitalpolicy.gov.hk](mailto:cpyng@digitalpolicy.gov.hk)) by 5:00 p.m. on 20 August 2024 (Tuesday).

42. In case Tropical Cyclone Warning Signal No. 8 or above is hoisted, or a Black Rainstorm Warning Signal or “extreme conditions after super typhoons” announced by the Government is in force for any duration at or after 1:00 p.m. on the above briefing date, the scheduled briefing will be cancelled and the Government will notify attendees of rescheduled briefing date.

## **X. Enquiries**

43. Enquiries in relation to this invitation can be addressed to Miss Alice CHAN, Senior Management Services Officer of SIE Fund Task Force Secretariat by email ([ascchan@digitalpolicy.gov.hk](mailto:ascchan@digitalpolicy.gov.hk)) or phone (2165 7261).

+++++