



香 港 骨 科 醫 學 會

THE HONG KONG ORTHOPAEDIC ASSOCIATION

Funding Mechanism for Subspecialty Chapter Activities

Background

Subspecialty chapters are established to provide a platform for members' in-depth professional development in the respective orthopaedic disciplines. Educational symposiums and scholarship-sponsored overseas training events will be the main intended formats of chapter activities. All subspecialty chapters are part of the Hong Kong Orthopaedic Association (HKOA). This document serves to outline the principles and process in organizing such educational activities.

Principles in Financing Subspecialty Chapter Activities

The principle of accountability should apply to any subsidiary organization of the HKOA, i.e., all subspecialty chapters.

The financial arrangement of subspecialty chapters' education activities should both self-sustainable and non-profit-making. All grants, expenditures and transactions involved during the organization process must be reported and thence processed by the HKOA via its Treasury and Secretariat.

The subspecialty chapter and organizing committee of the education event is responsible to keep a clear documentation for all transactions throughout the process. A final financial statement of the event should be submitted to the HKOA council for endorsement and subsequent record-keeping at the end of the event.

Current Subspecialty Chapters

There are currently five subspecialty chapters, namely:

1. Adult Joint Reconstruction,
2. Foot and Ankle,
3. Paediatric Orthopaedics,
4. Spine and
5. Sports Medicine

Subscription

Additional subscription fee is required for members to join the abovenamed HKOA subspecialty chapters. The biennial subscription fee for each chapter is HKD 200, whereas lifelong subscription fee for each chapter is HKD 1000 (for HKOA fellows).

Privileges of Subspecialty Chapters

- Events organized by which are recognized as HKOA activities
- Advisory from the HKOA council in administrative and organizational matters
- Announcement and publicization of the activities as endorsed by the HKOA

Privileges of Members of the HKOA and Members of Subspecialty Chapters

All HKOA and chapter members are eligible to participate in all subspecialty activities at a member registration rate as defined by the organizing committee.



香 港 骨 科 醫 學 會

THE HONG KONG ORTHOPAEDIC ASSOCIATION

Accounting and Reporting Requirements

All events and activities organized by subspecialty chapters should follow the same principles as applied to their parent organization, i.e. the HKOA. All activities need to have thorough financial planning with prior notification to the HKOA Secretariat by means of a filled application form ([click here to download form](#)). A well-balanced financial statement (i.e. nil surplus/deficit) of the event should be submitted to HKOA Secretariat within one month after completion of the event, in which all transactions should be enlisted with a summary of the account ([click here to download template](#)). Chairman of the organizing committee for the event may be invited to present the financial statement and report on the activity in the HKOA council meeting.

Source of Income:

In general, the anticipated major sources of income for subspecialty chapters are as follows:

1. Sponsorship from private industrial partners
2. Charitable educational funds or donations
3. Registration fees from participants
4. Annual grant from the HKOA

Sponsorships from Private Industrial Partners and Donations

- Sponsorships from private industrial partners or donations should all be made **directly payable to “The Hong Kong Orthopaedic Association”**.
- Expected forms of payments will be crossed cheques or bank drafts. Cash or debit/credit card transaction will not be accepted.
- Only after the sponsorship or donation officially received by the HKOA treasury will the Subspecialty Chapter be reimbursed for the amount concerned.
- Scholarships for educational activities, as a result of private sponsorship funding or donation, should be made applicable for all members of the subspecialty chapter. Formal announcement to all chapter members is required, preferably in the form of mass email.
- For every scholarship, regardless of whether it is intended for local or overseas event, the council of the subspecialty chapter should establish an open and fair mechanism in the selection of successful applicant(s) who shall receive the scholarship amount. President of the subspecialty chapter may be required by the HKOA council to report on the selection process.
- Chapters shall formally issue a **written request** to the private industrial partner, with clear statement of the purpose of use of sponsorship as well as the relevant terms. ([Click here to download the template letter](#))
- In return, the enterprise concerned has to issue a reply letter to the subspecialty chapter, with clear statement of the sponsorship amount, and its intention of use. The enterprise is also required to declare the sponsorship is not in exchange for promotion and recommendation on the use of its commodity, or business of any kind.
- It is highly recommended that the sponsorship or donation is completely utilized in one-off manner by the subspecialty chapter, i.e. with no surplus for accumulation. In the case of any



香 港 骨 科 醫 學 會

THE HONG KONG ORTHOPAEDIC ASSOCIATION

surplus, the Chapter shall **return the surplus to the private enterprise OR utilise the surplus to organise upcoming educational event.**

Expenditures:

1. Honorarium or monetary remuneration to invited overseas faculty*
2. Reimbursement of transportation, accommodation or refreshment consumed for invited overseas faculty
3. Venue booking and audio-visual support costs
4. Equipment loan and consumable items
5. Event promotion e.g. poster printing
6. Secretarial support e.g. editing and printing of program booklets, printing of certificates, registration of participants, CME applications
7. Refreshments and catering during event reception or meetings#
8. Souvenirs to faculty or participants

*According to *paragraph 13, Guidebook for Entry Visit / Transit in Hong Kong ID(E)1004* of the HKSAR Immigration Department, a work visa is required for any visitor if he or she will receive honorarium or remuneration for speaking / presenting at an event.

#The amount spent on this item should be of a modest and appropriate level. It must not be construed as excessive.

Annual Grant from the HKOA to Subspecialty Chapters

The financing of all education activities are expected to be self-sustainable.

The activities should be covered with registration fees of fair amount, with appropriate support from industrial sponsorship. The sponsorship from the HKOA should be minimal. If necessary, it must adhere to the principle of membership privileges as a result of their subscription. Since 2019, a maximum amount of HKD 40000 is available **annually** for application by each subspecialty chapter for organizing educational activities. Subspecialty chapters can accumulate the grant for a maximum of **two years**. The grant application, as well as the amount concerned, is subjected to approval by the HKOA council. The HKOA council retains the authority to cease the annual grant application at any time without prior notice to subspecialty chapters.

Budget control

The expenditures of the event must be tightly controlled to ensure the event is conducted and completed within the budget. The organizer has to ensure that no overspending is incurred and the HKOA would not bail out in the event of any outstanding balance. The organizer of the event is liable to settle any deficit by the subspecialty chapter resources.

Application Procedures and Registration of Activity

Application for grant from the HKOA is made by submitting theregistration form to the HKOA Secretariat ([click here to download form](#)). A four-to-six-week period is expected for administrative work before a formal approval (or rejection) of the application is issued. Subspecialty chapters are therefore advised to submit the application as soon as possible prior to the event.



香 港 骨 科 醫 學 會

THE HONG KONG ORTHOPAEDIC ASSOCIATION

Following approval or rejection of the application, an undertaking letter (*click [here](#) to download*) has to be signed by the chapter's president and returned to HKOA council.

Post-Event Financial Report and Account Summary

A financial report of the event and an account summary of all transactions should be submitted the HKOA council (*click [here](#) to download template*) **within one month** after the event. The HKOA council has the discretion to request for a presentation of the report by representative from the subspecialty chapter in the HKOA council meeting.