

Get ready for the Fund-raising dinner at Marlborough House in January

It is now official. We are going to hold an exciting fund-raising dinner in the magnificent Marlborough House in London on Friday 13th January 2006.

Some magnificent prizes have been donated by our supporters and will be awarded on the night. What a wonderful opportunity to show your support for the Trust by inviting potential donors. The organising committee for the event is Corinne Bowdery, Cheryl Burgess, Clair Beardson, Caroline Howe, Michael Wood and Tony van Gool. Full details will be published in our next newsletter. In the meantime pencil in the date in your diary.

Endow a China Oxford Scholarship in perpetuity!

People can leave money or property to charity following their death by making provision for it in their will. Lawyers call it a legacy or bequest. I prefer to call it a final donation or a gift. It can be as a specified sum of money (*pecuniary legacy*) or a specified item of value such as jewellery, shares or a property. Alternatively it could be a *residuary legacy* in which all or part of the net value of your estate is left to the Charity.

Have you made a will yet or revised it lately? I ask because I was amazed recently to come across a case where a highly intelligent and wealthy individual died intestate. This meant that everything he owned was distributed under rules laid down by law irrespective of the wishes of his family. It caused the break-up of a previously harmonious family. Making a will is the only way to ensure

that your wishes are carried out after your death.

Have you considered leaving part of your estate to the China Oxford Scholarship Fund? Perhaps you would like to do more but may have cash flow problems or other commitments. A will is a marvelous way to redress the balance as a bequest has a massive multiplier effect on charities both in encouragement and as it is nearly always unexpected. I can remember a number of times when an unexpected bequest has been a lifesaver for a charity.

The beauty of legacies is that they help a charity to protect in perpetuity part of their mission. For you it ensures that your name is permanently linked to something you believe in, knowing you will make a difference in the world. This is especially important to those who

have no dependents or close family members to leave their money to. It is also very attractive to those whose assets are large enough to attract inheritance tax upon their death. Charitable donations are completely free of inheritance tax. Would you rather leave your money to the taxman or the China Oxford Scholarship Fund?

At present almost 7 out of 10 people in the UK population support charities, but fewer than 1 in 20 remember a charity in their will. Yet it is easy to include a charity in your will, but you should always consult a professional such as a solicitor or financial adviser to be sure your will reflects your exact intentions.

Please consider us in your will.

Inside this issue:

Marlborough House dinner	1
Endow a China Oxford Scholarship	1
The Rt. Hon. The Lord Norrie	2
Funding activity	2
COSF structure	3
COSF Factsheet	5

Special points of interest:

- COSF—Oxford liaison Group formed
- Legacies & bequests
- Structure of COSF
- Question & Answer Factsheet

www.rememberacharity.org.uk has produced a free guide to making a will and gives you the steps you need to take to leave a gift to your favourite cause.

"It is literally true that you can succeed best and quickest by helping others to succeed"
Napoleon Hill

The Rt. Hon the Lord Norrie appointed Chair of the COSF Liaison Group with Oxford

The Fund has established a Liaison group to interface with Oxford University. The Group is chaired by **George Willoughby Moke Norrie—The Rt. Hon the Lord Norrie**. Following military service (11th Hussars & 4th Guards Brigade) he followed a successful career in the Nursery and Garden Centre Business. As a parliamentarian in the House of Lords he sat as a member of the EC Environment Committee and sponsored The National Parks Bill later to be incorporated into the Environment Act. He sponsored the Swimming & Water Safety Bill 1993 (enacted 1994). He was awarded the House of Lords Green Ribbon Political Award for services to the Environment. He has been an environmental adviser to a number of multinational companies and is currently working with the Alberta Government in Canada on resolving water related issues. Lord Norrie is a council member of a number of environmental and social charities. He is Patron of Age resource, The Faure-Alderson Romanian Appeal, Janki Foundation, and the Royal Life-saving Association. He became a Freeman of the City of London in 1999 and is cited in Debrett's 2006 & Who's Who 2006. He is a member of MCC, White's, and Cavalry and Guards. The Trust is pleased to have such a distinguished individual chairing our Liaison Group with the University. He is joined by Ms **Katie Lee** OBE (Senior Associate, Great Britain China Centre) and eminent surgeon **Colin Rayner**.



Funding Activity in UK and China

- **Anne Lindsay** is organising two Christmas cards for use by supporters of the Charity. **Philip English** has already committed to purchase them for his business this year. See Stop Press panel for details (COSF).
- **Colin Rayner** has made a personal donation of £1000 to the Fund (COSF).
- **Philip English** has worked hard these last few months to negotiate funds for a full scholarship and we expect an announcement in the future. From a brand name company (COSF).
- **Hugo Brunner** Esq., Lord Lieutenant of Oxfordshire has donated £500. (HKOSF).
- **The Earl of Carnarvon**, England has donated £1,000 (HKOSF).
- **HKR Limited**, Hong Kong. HK\$ 500,000 (ca. £33,000 pounds). The donation is a one-off contribution to our capital funds. We have invited them to accept the naming of our 5,000 pound awards this year as the "HKR Oxford Scholarship" (HKOSF).
- **The Grosvenor Foundation**, London. £15,000 (HKOSF & COSF). The Grosvenor donation is for this year and will be divided into £13,000 for a scholarship and £2,000 as contribution to the development of the Fund. The award will be called the "Grosvenor Oxford Scholarship" and has been given to our top scholar this year, Miss Ji, who will be studying clinical medicine. It is planned that a joint press release will be issued by Grosvenor and ourselves this month. This is likely to be in both London and Hong Kong. We hope this may lead to a widening relationship with Grosvenor.

STOP PRESS

Have you ordered your **Christmas Cards** yet? If not please consider buying cards that support COSF.

Anne Lindsay is organising two cards; one religious and one general. She will email the designs to all on the email list. If you are not on the list and would like to see the designs please email her on A.Lindsay@lindsaywelbeckltd.com

The world is moving so fast these days that the person who says it can't be done is generally interrupted by someone doing it.

Harry Emerson Fosdick

Pastoral Work

For the first ten years of the Scholarships there was no formal follow up with the Scholars once they went up to Oxford, or to keep in touch after their time there. I ([Peter Sunderland](#), Brasenose 1960, Engineering Science, Athletics Blue) had become involved with the HKOSF whilst working in Hong Kong, and had taken part in the interviews in Beijing and Hong Kong for the 2002 awards. Wanting to continue to contribute to the work of the Fund on returning to UK on retirement I proposed that I should meet the scholars, whom I had helped to choose, at Oxford and to set up a system so that they could keep in touch with us, and with each other. I considered it was important for future fund-raising that the results from the past could be used to show the benefits of what our Funds were being used for.

Accordingly the first meeting was held in April 2003 when Gill, my wife, and I lunched with nine of the 2002 scholars in the Cantonese restaurant near the Westgate Shopping Centre. The gathering went on long after all the other customers had left the restaurant, the bill was shared eleven ways, and contacts were established that continue to this day.

With the establishment of the COSF [Clair and Tim Beardson](#) entertained twelve scholars and other guests to lunch at Hailey in June 2004. Having identified [Professor Cui](#), of Hertford College, as the senior Chinese academic at Oxford, we were able to welcome him as well, and, following from this he was invited to join the COSF, later becoming a Trustee. To welcome the new 2003 scholars [Professor Cui](#) hosted a tea in Hertford College in November 2004. The Scholars Lunch was again held at Hailey in June this year (See last Newsletter).

From these early beginnings we now hope to be able to offer pastoral care to our Scholars, with Oxford based [Professor Cui](#) being joined by [Rev Lister Tonge](#) who has recently moved to the centre of Oxford and is Chaplain for retreats at the Houses of Parliament and Chaplain to Cuddesdon Theological College. We will now be able to hold a formal reception for the newly arriving Scholars, to introduce them to each other, with the aim of forming a thriving alumni association and with all our Scholars keeping us advised of their activities in the future.

2004 Scholars - Activities as at summer 2005

[Ms Guiyang Wu, Laura](#), First year M Phil in Economics at Brasenose College. Having passed all the three courses with well above average marks she is doing her M Phil thesis on econometric studies for investment behaviour with firm level panel data under the supervision of Professor Steven Bond

[Mr Huan Wang](#), M Phil Economics, St Anne's College. Huan is trying to get a work permit to enable him to work as a research assistant for his current Professor whilst applying for a further Ph D programme, but if not successful may go back to China and apply for the Ph D the next year.

[Mr Yi Duan](#), M Sc in Comparative and International Education at New College. Yi has returned to China and is researching educational policy in the Shanghai Academy of Educational Sciences whilst he writes his M Sc thesis. He advises that his salary is minimal, having given up higher paid but irrelevant job opportunities, but he feels happy.

[Mr Sze Che Kwok](#), PRS in Experimental Psychology at St Hugh's College will be in Oxford for another two years to finish his D Phil. He is investigating episodic memory in primates and defining the neural basis of this memory system. On his return to Hong Kong he hopes to establish a neuroscience laboratory to investigate the neural basis of human memory systems and help forward the development of neuroscience in Hong Kong.

[Mr Kalsang Yeshe](#), Wolfson College, has reported from Lhasa that he will be returning to Oxford at the beginning of October to continue his D Phil with the proposed thesis being Chinese Code switching in Modern Tibetan with evidence from Lhasa, Tibet.

Scholarship awards

The first award was in 1993, and until 1996 the awards were all made to Hong Kong residents. The first Mainland scholar was appointed in 1997. 4 students have received awards this year.

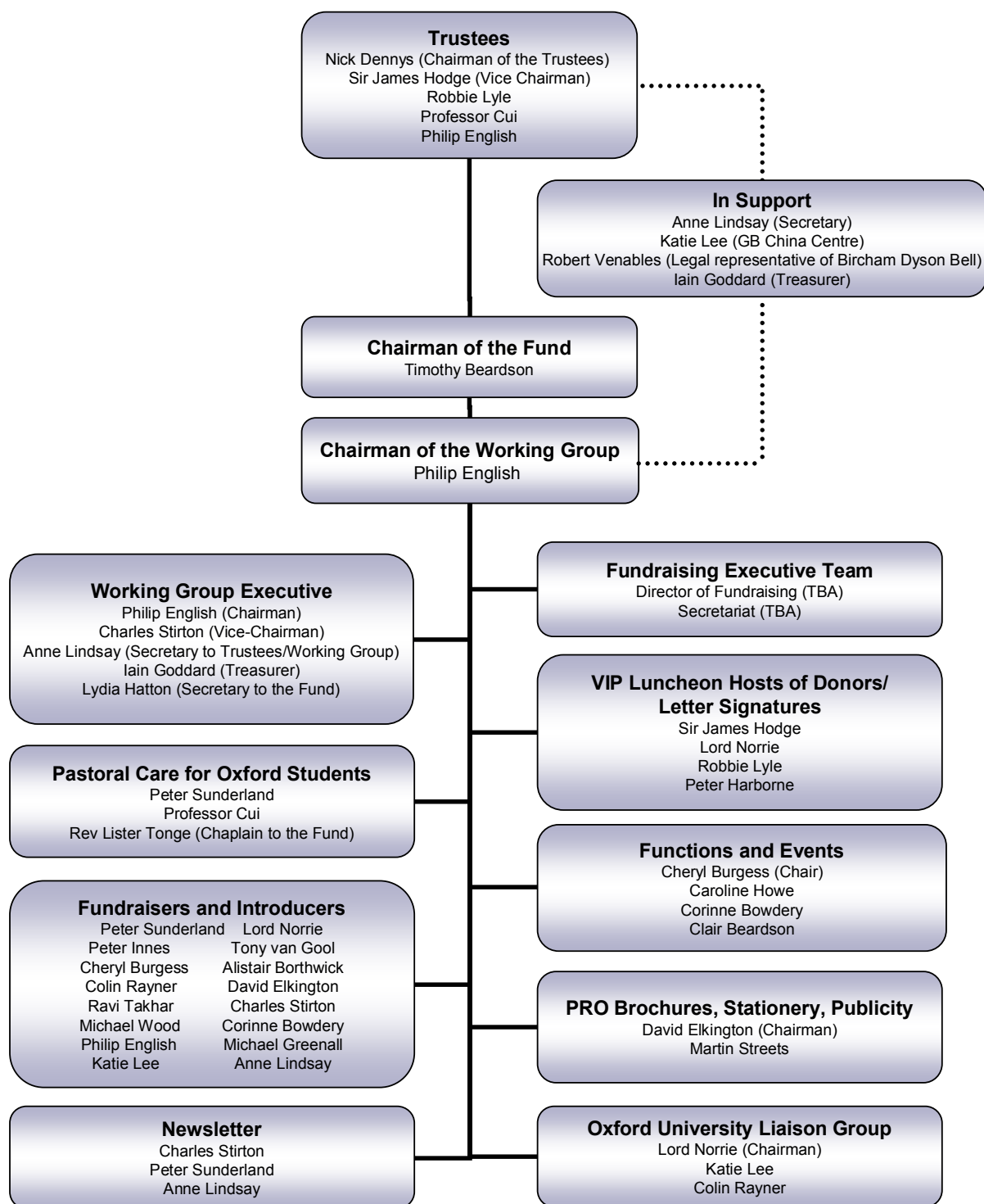
[Peter Sunderland](#)

Editor: In our next issue we hope to review the current whereabouts and activities of as many past students as possible plus a list of all current scholars



China Oxford Scholarship Fund

Working Structure 2005





China-Oxford Scholarship Fund (COSF)

FACTSHEET

What is the China Oxford Scholarship Fund?

The China Oxford Scholarship Fund is a private charitable initiative. It was established in 2004 to raise funds to create a permanent scholarship programme for 20+ deserving Chinese students to attend Oxford University. The Fund complements the successful Hong Kong Oxford Scholarship Fund which gives Hong Kong/Chinese students top up grants for post-graduate studies to Oxford University. The new initiative broadens the original scheme to one of international relevance and mirror images Rhodes scholarships. The new Fund works in partnership with the Hong Kong Fund and is funded by individual and corporate donations.

Tell me a bit about the precursor Fund

The Oxford Scholarship Fund was founded in Hong Kong in 1992 to provide financial awards to help postgraduate students take up places they have won at Oxford University. It has been developed over the last twelve years through the co-operation of a group of Hong Kong business people. Initially the focus was on assisting Hong Kong students and then gradually the exercise was expanded to offer awards to students throughout China. It is a private charitable initiative funded by individual and corporate donations. The British partner of the fund is called the China Oxford Scholarship Fund.

Why was the China Oxford Scholarship Fund established?

The China Oxford Scholarship Fund has been set up in the belief that we can make a real difference to the on-going development of one of the most important countries in the world. Our aim is to provide opportunities to students who will eventually take up major positions of leadership in China. The country is growing very fast and will need broad-minded leaders to steer it through the complex issues which will arise. It is very important that the world understands China and China understands the world.

Oxford has produced over 24 British Prime Ministers plus the present Indian Prime Minister, the present President of Colombia and the last President of the USA. In the year 2002/3, 56% of all postgraduate students were drawn internationally from outside Britain. It is a very dynamic, multicultural international environment.

How is the Fund structured?

The Fund is a private limited company, entered at Companies House. The Charity was registered with the Charity Commissioners on the 9th December 2004 and the Charity number is 1107204.

The Fund is administered by seven Trustees and is supported by a Working Group chaired by Mr. Philip English.

The trustees are:

Nick Dennys (QC)

Sir James Hodge (former British Consul General of Hong Kong)

Robbie Lyle (Director of the Commonwealth Disaster Management Agency and Vice

President (Overseas) of British Red Cross Society)

Page 6

Professor Zhan Feng Cui (Professor of Chemical Engineering in Oxford University)

Philip English (Chair of Philip T English International Financial Services Ltd)

The Secretary is Miss Anne Lindsay and the Treasurer is Mr. Iain Goddard.

Who are the Fund's bankers?

Our bankers are Coutts & Co (The Strand).

How will the funds be managed?

The Trust is setting up a small group of very experienced bankers and investment managers to manage the funds entrusted to it. They will adopt an ethical approach to investing.

Who are our legal advisors?

Our legal advisers are Bircham Dyson Bell.

Who is our patron?

Our patron is Baroness Thatcher of Kesteven, LG, OM, FRS.

What is the aim of the Fund?

The aim of the Fund is to provide scholarships for deserving Chinese students to undertake post-graduate studies at Oxford University. The students will commit to return to China and to contribute to her development.

What is the ultimate aim?

The ultimate aim of the Fund is to have established a £25 million endowment Fund to generate sufficient investment return to support annually in perpetuity approximately 20 deserving Chinese students to undertake postgraduate study at Oxford - a "Chinese Rhodes Scholarship" scheme.

The broad objective is to build this programme into a mirror equivalent of the Rhodes Scholarships for Greater China. This will eventually include the provision of facilities, pastoral and administrative support, and alumni links after completion as well as enhanced reach in the publicizing of the awards and the locations of the interviewing process.

How long will it take to establish the Endowment Fund?

Six years.

What will the fund do in the interim while the money is being raised?

Opportunities are being given to individuals and companies to contribute non-endowment funding to provide scholarships on a one off basis.

How are candidates chosen?

The fund will support the "brightest and the best" from China's universities. These students once they have completed their studies will be committed to returning to China as China Oxford scholars. We are determined that they will receive due recognition in their home country at senior level.

The selection of students is handled by the Hong Kong Oxford Scholarship Fund. The Awards Committee in Hong Kong sends letters out every spring to academic institutions in mainland China, Hong Kong, and Britain alerting them to the availability of awards for students from mainland China and Hong Kong who have been offered places at Oxford University for postgraduate studies.

Applications are received. Those selected for interview are invited to attend meetings with members of the Awards Committee in Beijing, Shenzhen or Hong Kong. The meetings include discussions about the candidates' financial resources. The Awards Committee then selects a limited number of applicants to receive an award for one year from the resources of the Fund.

We have generally found that although postgraduate studies normally last for more than one year our students have always been able to locate other sources of finance once at Oxford. Accordingly our awards are normally only for the first year thus enabling them to take up the initial offer of a place.

In a typical year there are about 100 applicants and up to 12 are given full or partial awards. The awards could be advertised even more widely and the interviewing could take place in more locations but the resources of the Fund are presently quite constrained.

What is looked for in candidates?

Candidates are selected against a clear set of criteria:

- a firm offer from Oxford University
- all-round personality
- leadership characteristics
- fluent enough in English to benefit from the experience
- a commitment to return to China and contribute
- academic excellence
- a lack of ability to pay in full but with an ability to fund the gap we don't meet.

Why China?

In the 21st century China will be the pre-eminent and dominant force in the global economy. Her leadership - within and without - will be a force to be reckoned with. It is very important that the world understands China and China understands the world. The China Oxford Scholarship Fund has been set up in the belief that we can make a real difference to the development of one of the most important countries in the world. We are helping to build the next generation of leaders in China. The country is growing fast and will need internationally orientated leaders to steer it through the complex issues which will arise.

Why Oxford?

The importance of China – in politics, economics, business, science and arts – will grow as the 21st century progresses. Oxford University is an internationally recognized centre of excellence. It has produced more world leaders than any other University. China already provides many of the overseas students at British universities. That number will grow. China will want to see its best students in the best universities. The university plans to establish a major world centre for excellence on China. Scholarships have a key role to play in this.

Supported by Oxford University?

Oxford University recognizes COSF as an integral part of and an important contributor to its China strategy. The Fund and the University have agreed a Memorandum of Understanding that sets out in clear and unambiguous terms the mutual and collaborative relationship between the two organizations.

Supported by Chinese Government?

The Chinese Government is fully supportive of the Fund and has expressed its pleasure that the Fund and the University are working closely together.

Supported by Her Majesty's Government?

Her Majesty's Government is fully supportive.

What size of donations are you looking for?

Donations can be of any size. There is a Table of Gifts which sets out the targets for each level of gift. However, for administrative purposes the bigger, the better. Gift aid forms should be completed for every donation as this leverages a considerable amount of funds for the Fund.

Is gifts tax deductible?

Yes, for UK Taxpayers.

What proportion of income is spent on administration?

We aim to spend as little as possible on administration. Many individuals are already giving time and talent free of charge. Secretariat services are currently being provided gratis by Philip

English's Office and telephone calls are provided at no cost. A full-time fundraiser and a small support team will take over this service in the near future. Inevitably, until income rises – which it will do, quickly – the cost of admin will become a higher percentage than it is confidently expected to be later.

How can I donate?

The objective is to raise endowment capital of 25 million pounds. While this campaign is in process we would like to raise a mixture of capital, term commitments (for example, 3-year or 5-year commitments) and annual one-off income.

For capital sums or term commitments of a reasonable duration, we could arrange bespoke scholarships which are acceptable in principle by the University authorities. They could be named by the donor.

For individuals and families it might be appropriate to name a scholarship after a family member.

Companies may wish to exercise naming rights on scholarships as a means to highlight their involvement in China and their sponsorship of the awards. It would also strengthen the links between the recipient and the donor. They may wish to have a specific award ceremony. Internships can be offered during the vacations and recruitment prospects can follow. Participation in interviewing for specifically funded scholarships might be arranged. The geographical area of applicant origin and subject of study can be stipulated as preferences.

We would like potential donors to look at the project in a variety of ways. Just to give some examples: -

- a. One scholarship for one year would cost £20,000 to £40,000. However, we do want to encourage commitments which are likely to last beyond one year. Also there are costs associated with the structuring and organising of these awards.
- b. A 3-year commitment to fund a specific scholarship at the anticipated rate would be from £60,000 to £120,000.
- c. A 5-year commitment to fund a specific scholarship would cost around £150,000 pounds.
- d. The capital to fund a permanent scholarship, at current interest rates, would be £1 million pounds.

How will I be kept in touch with COSF activities?

There are many ways in which you will be kept in touch with the fund and on the progress with your donation and its recipient. These will include, but not exclusively: a regular newsletter, invitations to functions and having the opportunity to interact with the scholars, academics, and other donors.

Can I have my family/company name associated with a scholarship?

Yes.

Can I specify a College/subject?

It is not possible to influence the choice of College as the University makes this decision. However, it is possible to indicate preferences for a particular subject area bearing in mind that the trust needs to be mindful that it should support a balance of disciplines given its mission to influence the future leadership of China across all disciplines.

Where can I get further details?

See the contact details at the end of this document.

Tell me a bit about previous scholars' experiences?

Details will be published regularly in our China Scholars Newsletter and are available on request.

What pastoral care is given to the students?

A group of volunteers has been formed within the trust to build on the work of Peter Sunderland over the last two years to provide pastoral support to our scholars while they are at Oxford. This may take many forms but the members will be available to assist and advise on any problems which the scholars may come across after they arrive at the University. The group is composed of Peter Sunderland with Professor Cui Zhanfeng and the Rev. Lister Tonge. Lister is a chaplain at the Houses of Parliament and lives in Oxford.

Can I meet with or speak to current students?

Yes, subject to agreement by individual scholars.

What do I get in return?

Knowledge you have contributed to a very worthwhile cause with long-term positive implications. The Trust will provide a regular newsletter of progress and will receive an invitation to the annual scholar's lunch.

Why give to COSF as opposed to other scholarship schemes for China?

COSF, the British partner of the Hong Kong Scholars Fund, builds on and extends the hugely successful thirteen year-old scheme. To date, over 74 Chinese students have now attended Oxford University as bursary holders.

For further details please contact:

Philip English, International House, Churchlands, Chipping Warden, Banbury, Oxfordshire
OX17 1LN. Telephone: 01295-660571 Fax: 01295- 660725. Email:
lydia.hatton@philiptenglish.com

or

Charles Stirton, 4 Nelson Villas, Bath, Avon, BA1 2BD. Telephone 01225-425-966. Email:
chstirton@tiscali.co.uk

Stop Press

Sir Colin Lucas, outgoing Vice-Chancellor of Oxford University and Warden of Rhodes House, has generously offered Rhodes House for a reception in November to welcome the new intake of supported Chinese scholars. If you would like to attend please contact Philip English.

Editor: Charles Stirton