

**Induction Programme for
School Executive Officers –**

**An Overview of
School Administration**

25 September/2 October 2019

by EDB

Topics

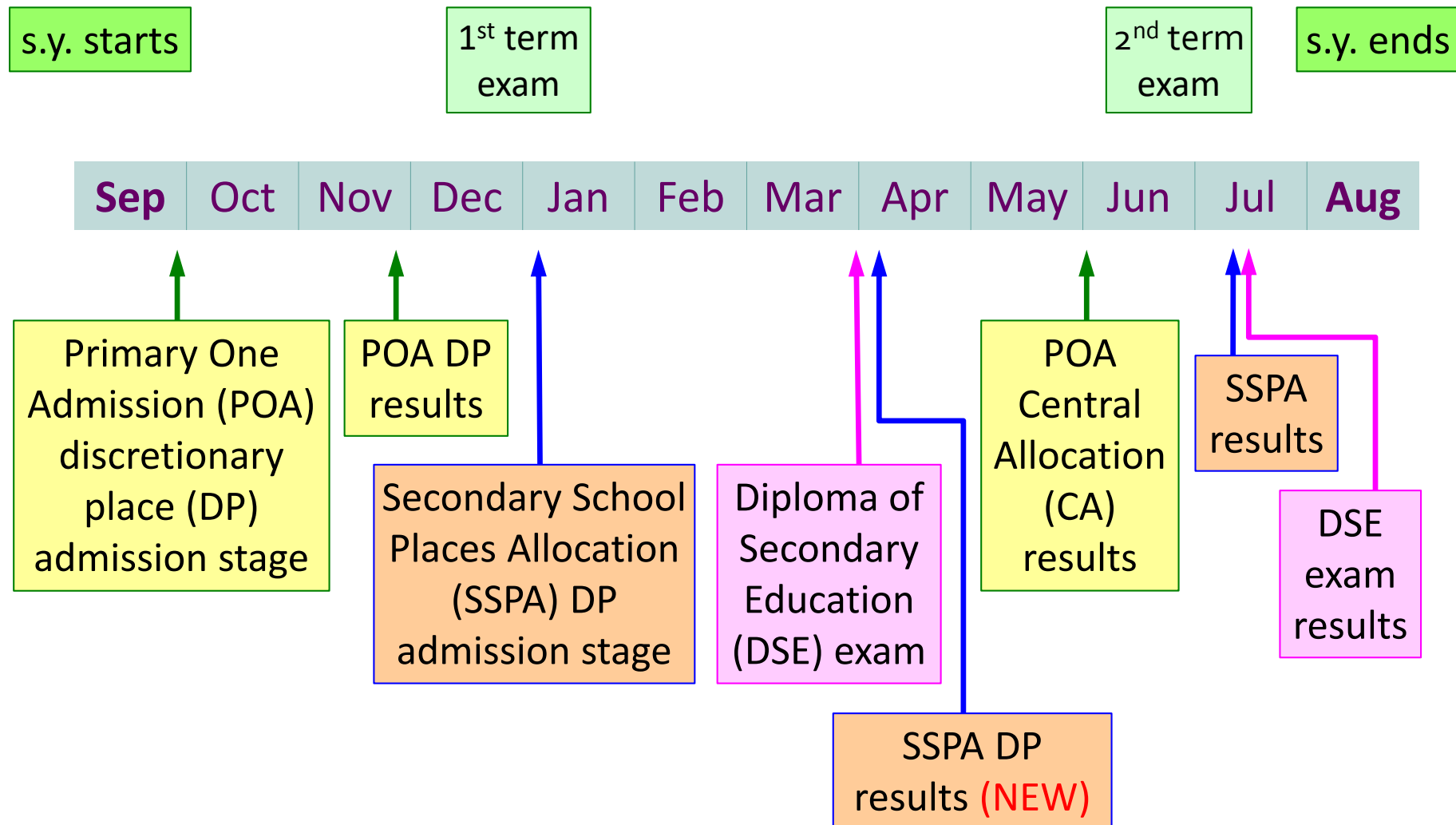
- **Introduction**
- **“One Executive Officer for Each School” Policy**
- **Operation of Incorporated Management Committee**
- **Financial Resources Management**
- **Accounting Arrangement and Procurement**
- **Human Resources Management**
- **More References on EDB Website**
(www.edb.gov.hk)
- **Questions and Answers**

Types of Schools in Hong Kong

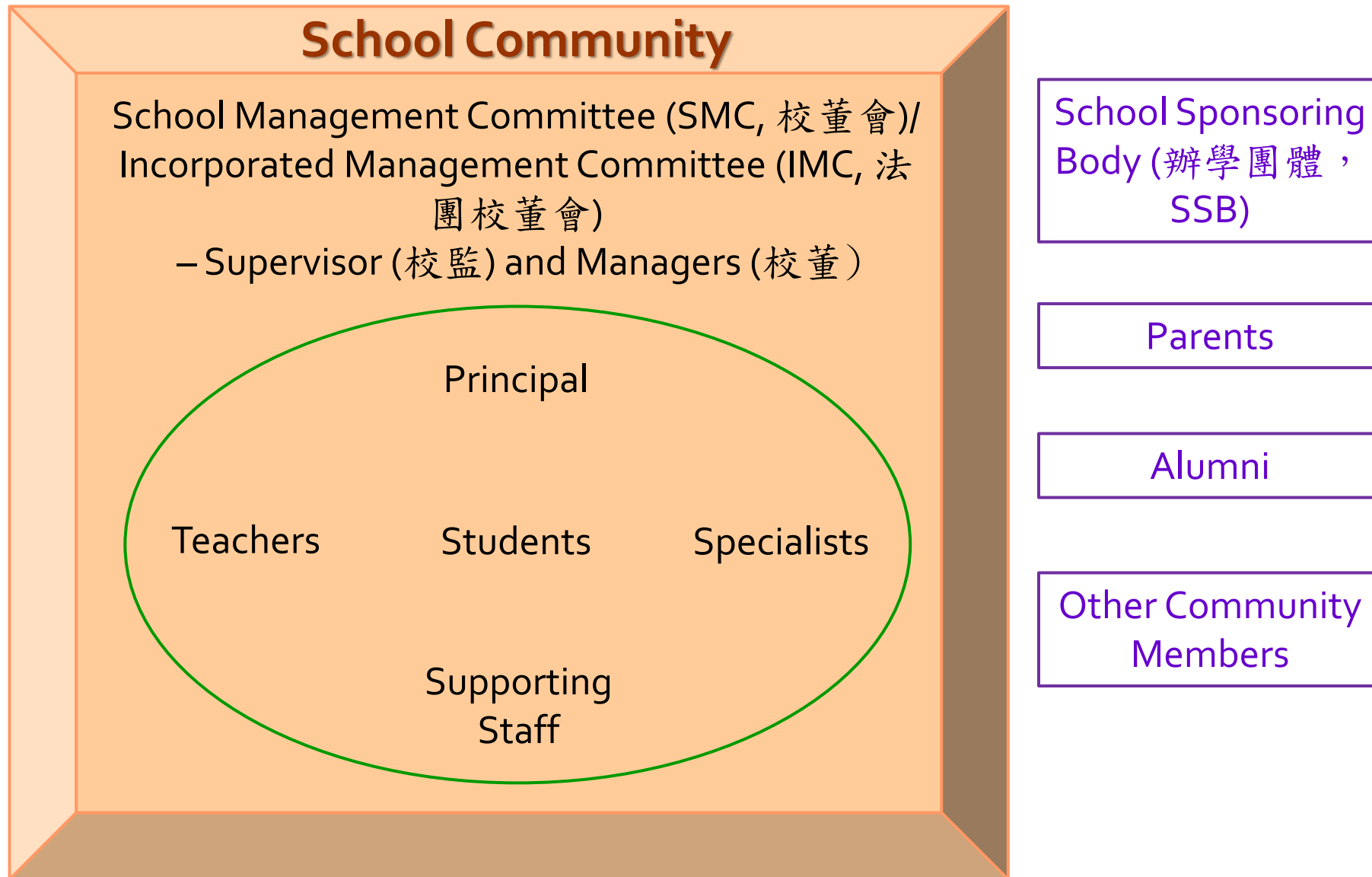
By Finance Type

- Aided Schools (資助學校)
 - Government Schools (官立學校)
 - Caput Schools (按位津貼學校)
 - Direct Subsidy Scheme Schools (直接資助計劃學校)
 - Private Schools (私立學校)
- 
- Public sector schools
公營學校

Some Major Tasks in a School Year (s.y.)



Stakeholders and Personnel in Schools



Rules and Regulations that Govern the Operation of Public Sector Schools

- **Education Ordinance (EO, 教育條例), Education Regulations (ER, 教育規例) and other legislations, such as Employment Ordinance (EmO, 僱傭條例), etc.**
- **Codes of Aid (CoA, 資助則例)**
- **School Administration Guide (SAG, 學校行政手冊)**
- **Circulars and Circular Memorandum (通告及通函)**
- **Instructions given by Permanent Secretary for Education (PS(Ed), 教育局常任秘書長) from time to time**

Common Administration Issues in Schools

- **School Management**
- **Learning and Teaching**
- **Student Matters**
- **Home-school Matters**
- **Finance Matters**
- **Personnel Matters**
- **School Premises Matters**

“One Executive Officer for Each School” Policy

「一校一行政主任」政策

“One Executive Officer for Each Sch” Policy

- **Recommended by the Task Force on School-based Management Policy**
- **Aim:**
 - Enable schools to review their school-based administrative arrangements and requirements, streamline administrative procedures, strengthen school administrative support;
 - Reduce the administrative work of teachers and principals

“One Executive Officer for Each Sch” Policy (2)

- From 1.9.2019, each aided school will be provided with a school executive officer (Sch ExO) and may choose either one of the modes below:
 - i. Creating a **regular Sch ExO post** in the establishment of the school for employing a full-time Sch ExO
 - ii. Receiving the **School Executive Officer Grant (SEOG)** to recruit at least one full-time Sch ExO or procure school administration-related service with at least one full-time school-stationed Sch ExO

Proposed Scope of Responsibilities of Sch ExO

- EDBCM No. 37/2019 (Appendix I)
- To assist in supervising and coordinating school administrative matters, for example:
 - to assist the SMC/IMC to put in place a proper internal control mechanism for personnel and financial management;
 - to support the operation of the SMC/IMC (such as communicating with school managers and relevant parties, preparing documents for meetings, drafting minutes of meetings, assisting in election and registration of school managers, coordinating school-based, joint-school or school sponsoring body-based training for school managers, and seeking legal advice based on school operational needs);

Proposed Scope of Responsibilities of Sch ExO (2)

- to assist in the executive functions of financial resource management (such as procurement of goods and services, handling school trading operations, acceptance of donations, budgeting and financial control, accounting and maintenance of records) and human resource management (such as staff appointment, regrading, promotion and acting appointment, termination of employment, leave arrangement and salary assessment);
- to supervise and manage duties of non-teaching staff;
- to assist in reviewing school-based mechanisms, internal administrative arrangements and requirements (such as handling of school complaints, crisis management, parent education, maintenance of school premises and safety issues);
- to assist in handling of routine school administrative matters;
- to liaise with stakeholders of the school.

Information about Sch ExO

School Administration and Management > Administration > About School Staff

The screenshot shows the Education Bureau website interface. At the top, the Education Bureau logo and name are displayed, along with the text 'The Government of the Hong Kong Special Administrative Region'. The navigation bar includes 'GovHK 香港政府一站通', language options (繁體版, 简体版), and links for 'Mobile / Accessible Version', 'My Colour', 'AA', a search bar, and 'Site Map'. The main content area is titled 'Home > School Administration and Management' and features a 'Print' button. A left sidebar contains a menu with 'School Administration and Management' highlighted. The main content area shows a dropdown menu for 'Administration' with 'About School Staff' selected. Other dropdown menus include 'Regulations', 'School Registration', 'Quality Assurance for Schools', 'School Premises Related Information', 'Policy Documents', 'Year Planner', 'Financial Management', 'School-based Management', and 'School Management Committee/ Incorporated Management Committee Service Agreement'. A bottom section contains promotional banners for 'Insider's Perspectives', 'School Management Committee', 'TSA Items', and '2019 HKDSE Exam Results'.

Information about Sch ExO (2)

.... About School Staff > Staff Entitlement Matters of Aided Schools >
"One Executive Officer for Each School" Policy

WebPage

The screenshot shows the Education Bureau website. The header includes the Education Bureau logo and name, 'The Government of the Hong Kong Special Administrative Region', and the 'HONG KONG' logo. A navigation bar contains links for 'GovHK 香港政府一站通', language options (繁體版, 简体版), 'Mobile / Accessible Version', 'My Colour', font size 'AA', a search bar, 'Site Map', and a mail icon. A left sidebar lists various menu items such as Home, Latest News, About EDB, Press Release, Education System and Policy, Curriculum Development, Students and Parents Related, Teachers Related, School Administration and Management, Public and Administration Related, Access to Information, and Contact Us. The main content area features a banner image of children and an open book. Below the banner is a breadcrumb trail: Home > School Administration and Management > Administration > About School Staff > Staff Entitlement Matters of Aided Schools. The main heading is 'Staff Entitlement Matters of Aided Schools'. Underneath, there is a sub-heading 'Applicable to Aided Secondary and Primary Schools' followed by a red-bordered box containing the text '"One Executive Officer for Each School" Policy (Updated in March 2019)'. Below this box is a list of links: EDB Circular Memorandum No. 37/2019, Appointment matters of School Executive Officer in the Approved Non-teaching Staff Establishment in Aided Schools, Use of the "School Executive Officer Grant", Frequently Asked Questions (FAQs), Arrangements for School Executive Officer in the 2019/20 school year, and Powerpoint presented at the briefing sessions on 28 February and 1 March 2019: (1) Summary of Policy (2) Analysis of FAQs (Chinese version only). Another sub-heading 'Applicable to Aided Secondary Schools' follows, with a list of links: Frequently Asked Questions and Answers (Updated in April 2019), Fractional Post Cash Grant, Appointment Matters Relating to Fractional Post in Aided Secondary Schools, and Frequently Asked Questions (FAQs) on the Enhancement Measures for Turning Senior Secondary Curriculum Support Grant and Career and Life Planning Grant into Regular Teaching Posts (Updated in February 2019). At the bottom left, there is a small graphic for 'Insider's Perspectives'.

Operation of Incorporated Management Committee

法團校董會的運作

School-based Management (SBM, 校本管理)

Student-oriented

**Transparency and
Accountability**



**Participation in
decision-making**

Self-improvement

School-based Management (2)

2004 Education (Amendment) Ordinance

- Effective date: 1 January 2005
- All aided schools shall set up Incorporated Management Committees (IMCs)
- This forms a legislative basis for participatory governance framework with major stakeholders' participation in school policy decision making and school management

**Incorporated Management
Committee (IMC)**



**School
Sponsoring
Body (SSB)**

**Education
Bureau (EDB)**

Part IIIB of the
Education Ordinance
(Section 40AA – 40CB)



https://www.elegislation.gov.hk/hk/cap279!en-zh-Hant-HK?INDEX_CS=N

IMC Constitution of
the school



Governance Framework – Composition of IMC in Aided Schools

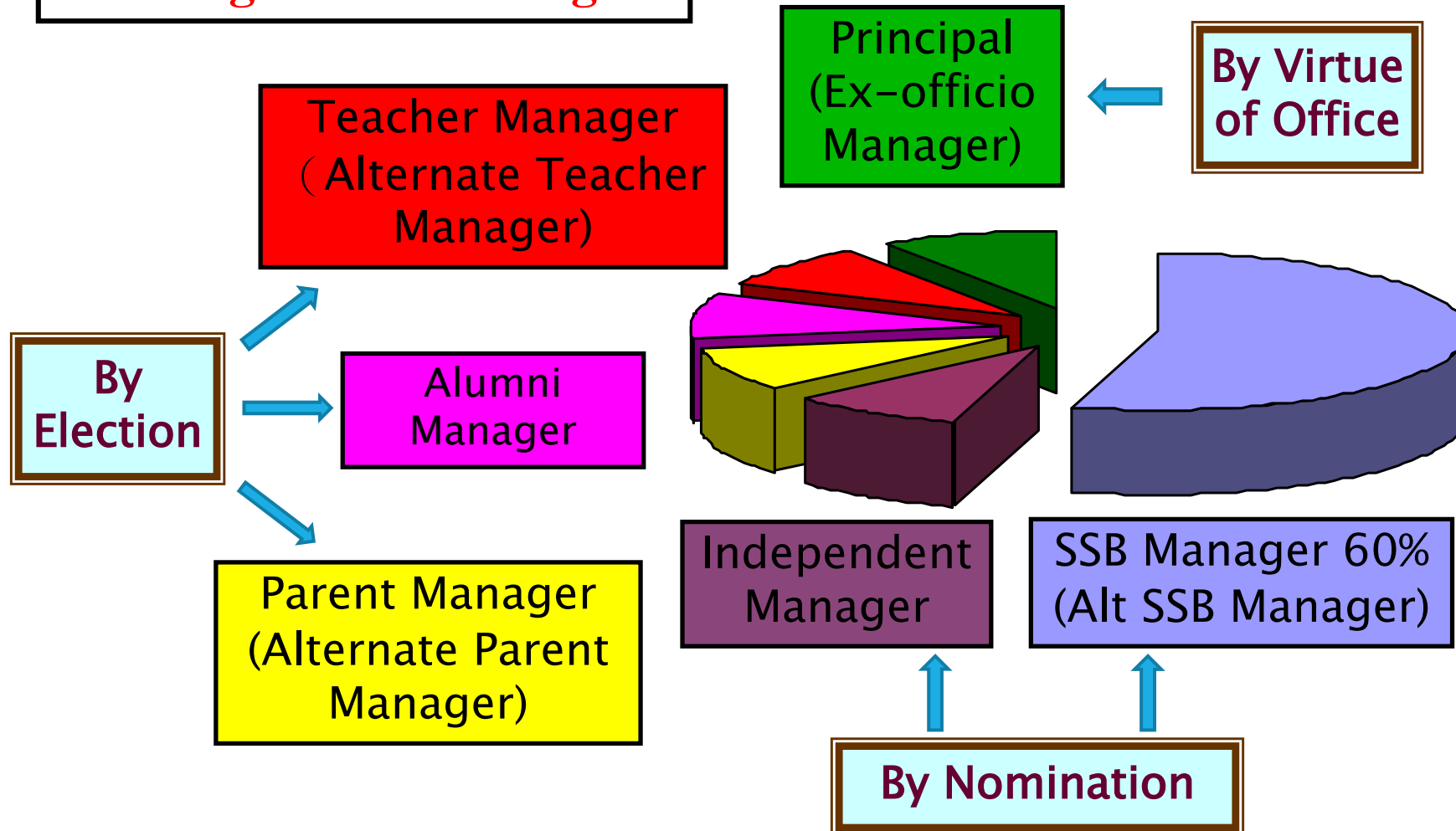
(Section 40AL of Education Ordinance)

Composition of IMC	Number
Sponsoring Body (SSB) Manager	Maximum 60% of the maximum number of all managers
Ex-officio manager (Principal)	One
Teacher Manager	Not less than one
Parent Manager	Not less than one
Alumni Manager	One or more
Independent Manager	Not less than one

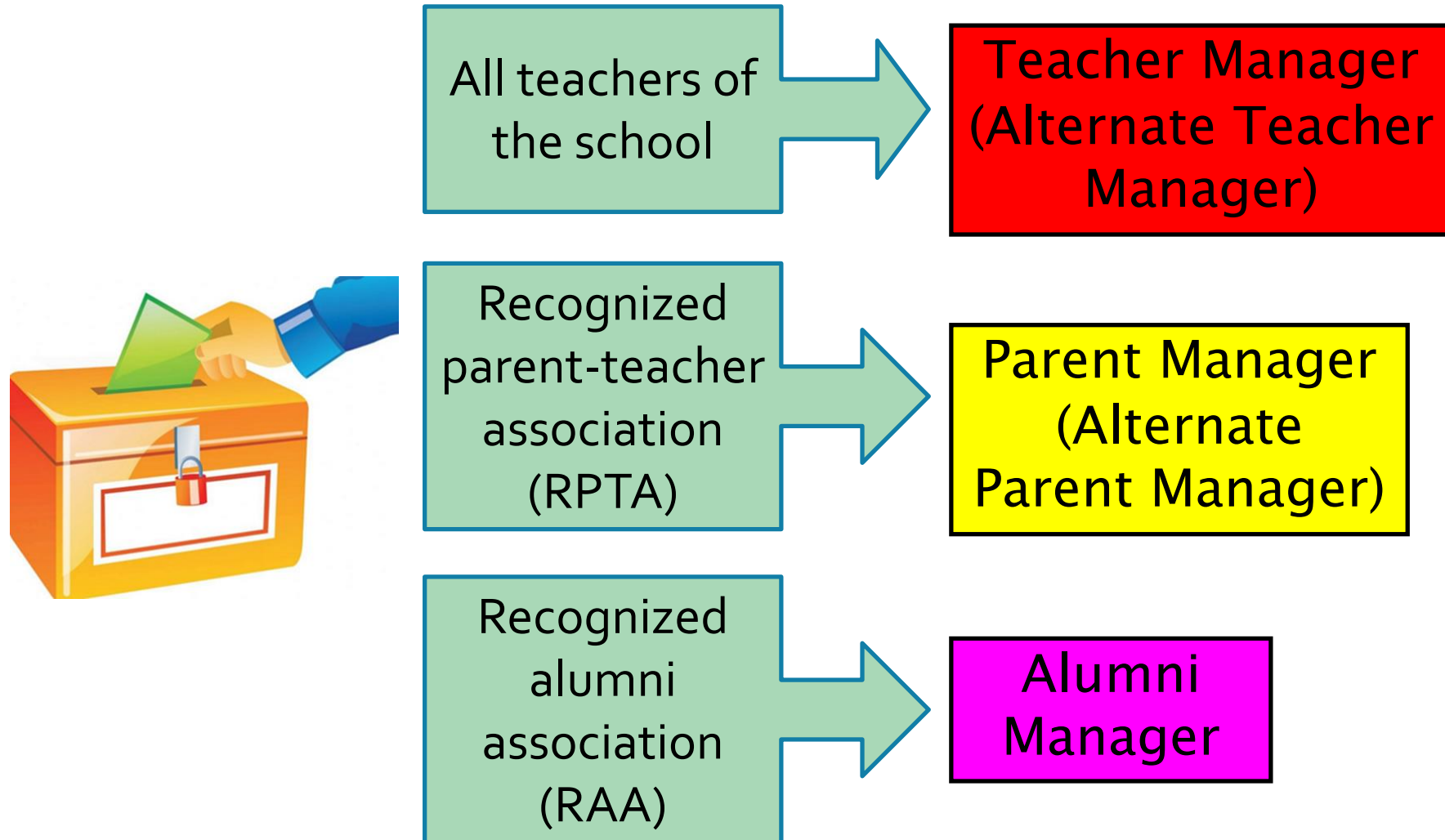
Composition of IMC

(Section 40AL of Education Ordinance)

6 Categories of Managers

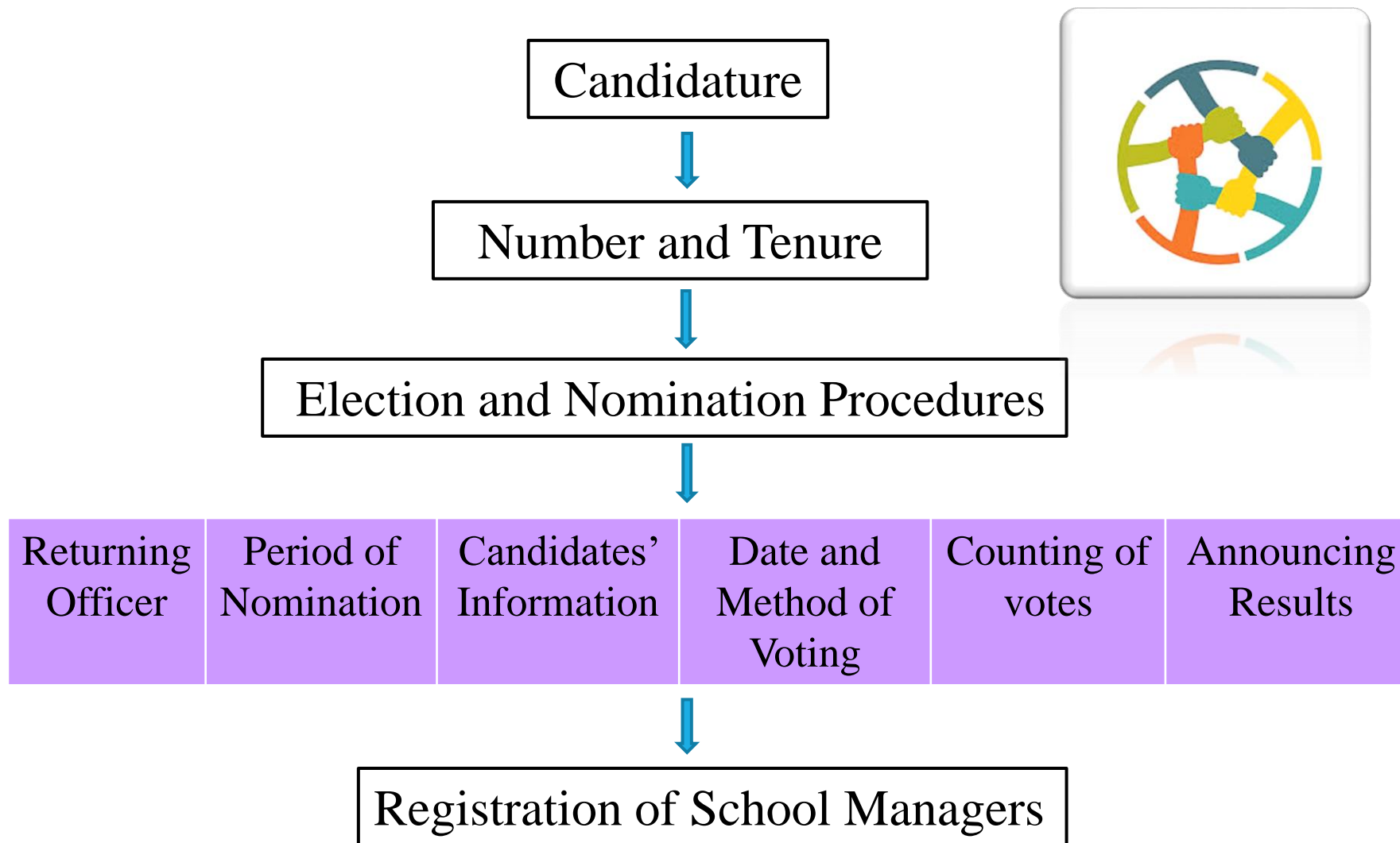


Election/Nomination of School Managers



Election and/or Nomination of School Managers

Points to note



Elections of School Managers

School Administration and Management > School-based Management (SBM) > [References for School-based Management and Forms](#)

WebPage

References for School-based Management and Forms

- School-based Management Documents
 - [What is SBM?](#) (4,424 KB)
 - [Incorporated Management Committee - Establishment and Operation](#) (1,786 KB)
 - [Tips for School Managers](#) (3,033 KB)
 - [Tips for School Managers \(Web Version\)](#)
 - [School Managers' Handbook](#) (874 KB)
- Samples and Forms
 - [Sample Constitution for IMCs](#) (as at 22/04/2014) (96 KB)
 - [Sample Form for Declaration of Interests](#) (22 KB)
 - [Sample Recognition Letter to Parent-Teacher Association](#)
 - [Sample Recognition Letter to Alumni Association](#) (21 KB)
 - Form IMC-1: Notice of Intention to Establish Incorporated Management Committee
 - [For Operating Schools \(Form IMC-1a\)](#)
 - [For Planned Schools \(Form IMC-1b\)](#)
 - Form IMC-2: Submission of Draft Constitution of Incorporated Management Committee
 - [For Operating Schools \(Form IMC-2a\)](#)
 - [For Planned Schools \(Form IMC-2b\)](#)
 - Form IMC-3: [List of Proposed Managers](#)
 - Form IMC-4: [Notice of Assumption of Office of First Supervisor/Supervisor/Acting Supervisor](#)
 - Form IMC-5: [Notice of Resignation, etc of Manager](#)
 - Form IMC-6: [Notice of Vacation of Office of Manager](#)
 - Form 6A: [Application of Registration as a Manager](#)
 - CCR Proforma: [Proforma on Criminal Conviction Records for Application for Renewal of Tenure of Office of a Manager](#)
- Manager of Incorporated Management Committee
 - [Statutory Requirements for Parent Manager Election](#) (190 KB) CHI
 - [Guide for Manager Election](#)
 - [Guide for Teacher Manager Election](#) (as at 31/10/2014) (156 KB)
 - [Guide for Parent Manager Election](#) (as at 31/10/2014) (291 KB)
 - [Guide for Alumni Manager Election](#) (as at 4/11/2015) (497 KB)

Guide for Manager Election

- Guide for Teacher Manager Election
- Guide for Parent Manager Election
- Guide for Alumni Manager Election

IMC Forms

WebPage

GovHK 香港政府一站通

繁體版 简体版

Mobile / Accessible Version

My Colour

AAA

Enter search keyword(s)



Site Map



Home

Latest News

About EDB

Press Release

Education System and Policy

Curriculum Development

Students and Parents Related

Teachers Related

School Administration and Management

Public and Administration Related

Access to Information

Contact Us



Home > School Administration and Management > School-based Management (SBM) > Incorporated Management Committee (IMC)

Print

IMC Forms

Topic	Download Format	eForm
Form IMC-1a & 1b (Notice of Intention to Establish IMC)	form imc-1a.doc form imc-1b.doc	
Form IMC-2a & 2b (Submission of Draft Constitution of IMC)	form imc-2a.doc form imc-2b.doc	
Form IMC-3 (List of Proposed Managers)	form imc-3.doc	
Form IMC-4 (Notice of Assumption of Office of First Supervisor/ Supervisor/ Acting Supervisor)	form imc-4.doc	
Form IMC-5 (Notice of Resignation, etc of Manager)	form imc-5.doc	
Form IMC-6 (Notice of Vacation of Office of Manager)	form imc-6.doc	
Form 6A (Application for Registration as A Manager)		
<i>[Updated version of Form 6A [EDB 77 (7/2012)] shall be used effective from 12 July 2012. Previous version of the Form is not accepted.]</i>	form 6A.pdf	eForm 6A
CCR Proforma (Proforma on Criminal Conviction Records for Application for Renewal of Tenure of Office of a Manager)		
<i>[Managers applying for renewal of tenure of office the effective date of which falls on 1 August 2013 or after are required to provide the duly completed CCR Proforma.]</i>	CCR Proforma.pdf	



Procedures of IMC Meetings



Number of IMC Meetings: **3**

Minutes of IMC Meetings

Contact of IMC Managers

Quorum of meeting

Agenda and Attendance

Documents to be Tabled

More Information about IMC Operation on EDB Website

School Administration and Management > School-based Management

WebPage

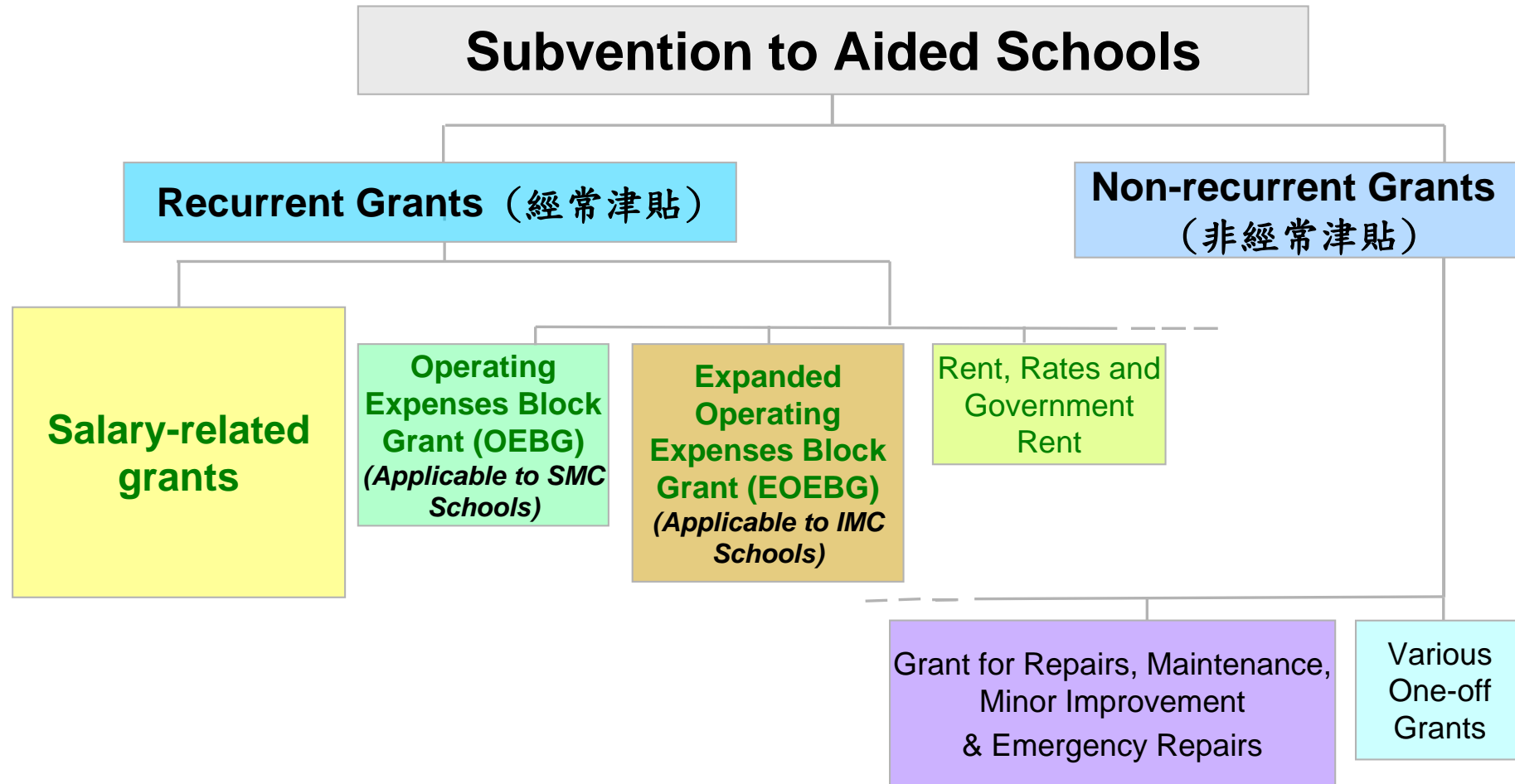
The screenshot shows the EDB website interface. At the top, there is a navigation bar with 'GovHK 香港政府一站通', language options (繁體版, 简体版), and utility links (Mobile / Accessible Version, My Colour, search, Site Map). A left sidebar contains a menu with 'School Administration and Management' highlighted in a red box. The main content area shows a breadcrumb trail 'Home > School Administration and Management' and a list of sub-topics: Regulations, Administration, Financial Management, and 'School-based Management', which is also highlighted in a red box. A dropdown menu for 'School-based Management' is open, listing items such as 'School-based Management and School-based Management Governance Framework', 'Workflow of IMC Establishment and Related Matters', 'Corner for Incorporated Management Committee Schools', 'Corner for School Managers', 'Manager Training', 'References for School-based Management and Forms', 'Register of IMC', and 'Enquiries'. A blue callout box on the right, titled 'School-based Management', lists: '.....', 'Corner for IMC Schools', 'Corner for School Managers', 'Manager Training', and '.....'. A 'Year Planner' dropdown is visible at the bottom right of the main content area.

Financial Resources Management

財政資源管理

Subvention to Aided Schools

- In general, the operating expenses of aided schools are met from government grants



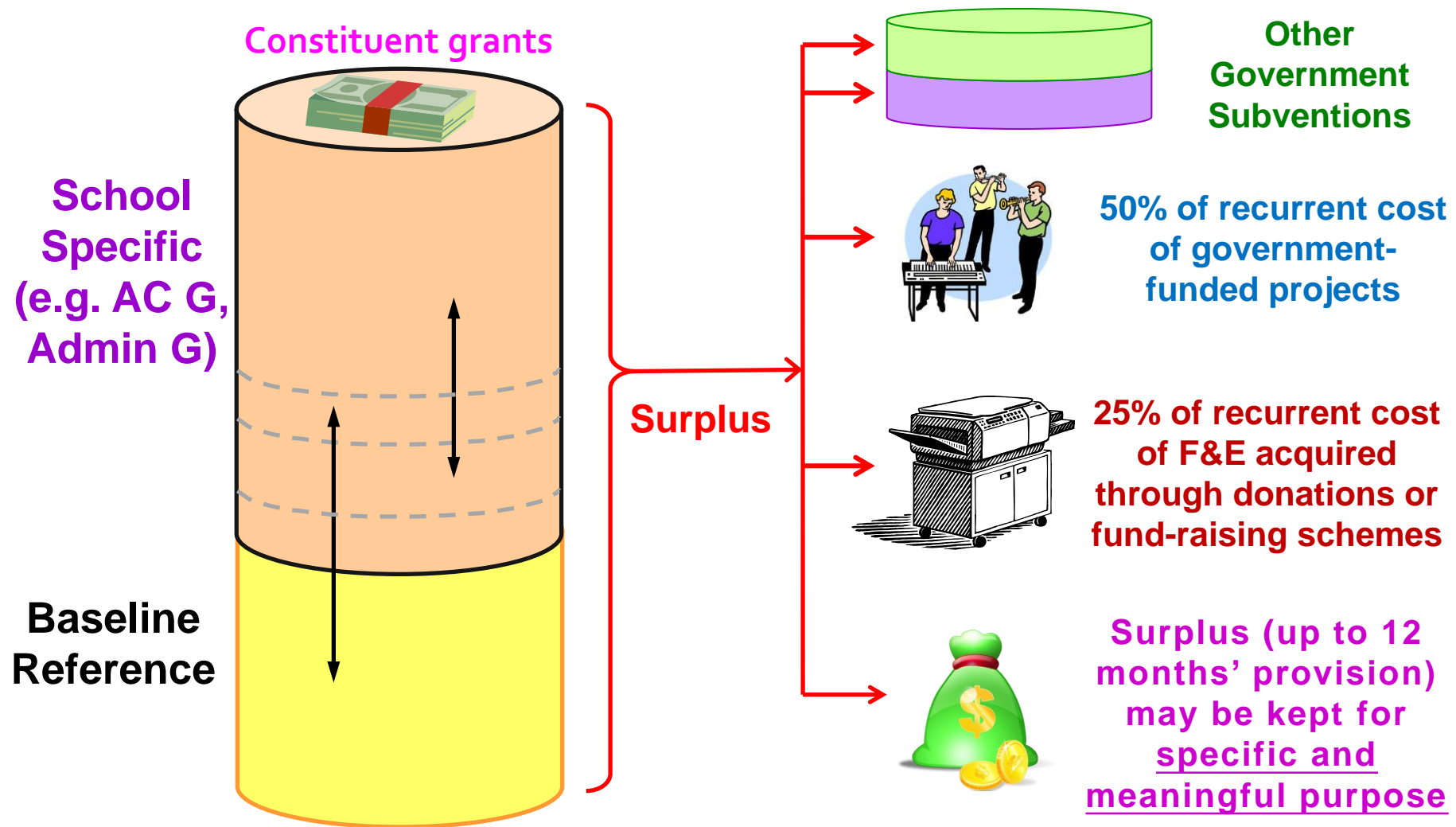
Expanded Operating Expenses Block Grant (EOEBC, 擴大的營辦開支整筆津貼)

- Provided to schools in the school year following the establishment of the IMCs
- Include virtually all non-salary recurrent grants
- Provide schools with greater flexibility in using resources
- The computation and adjustment of provision are simplified
- Surplus can be retained up to 12 months' provision

Surplus can be used to top up :

- 1) non-recurrent expenses for projects approved/funded by EDB
- 2) 50% of recurrent cost arising from government-funded projects
- 3) 25% of recurrent cost arising from furniture and equipment and other facilities or educational service acquired through private donations or other fund-raising schemes

Expanded Operating Expenses Block Grant (2)



(Annual Adjustment -- June-on-June movement of the Composite Consumer Price Index (CCPI))

Rent, Rates and Government Rent

- Provided to eligible schools to refund the rent, rates and government rent of premises for school purposes

(For details, please refer to EDBC014/2007 Refund of Rates and Government Rent)

Non-recurrent Grants

- ***Capital Cost for Building, Furniture and Equipment***
- ***Grant for Repairs, Maintenance, Minor Improvement & Emergency Repairs***
- ***Furniture & Equipment Grant***

Replacement of Furniture and Equipment cost due to fire, natural disasters or theft
- ***Other One-off Grants***

For special programmes/projects, e.g. Grant for Establishment of Incorporated Management Committee (IMC), Provision of One-off Grant to Schools for the Promotion of STEM Education, etc.

Other Sources of School Income

- **Tong Fai (Senior Secondary)**
 - **Collection of fines, charges and fees for specific purposes**
 - **Fund raising/Donations**
- * Schools must observe the Education Regulations, Circulars/Circular Memorandum and Guidelines issued by EDB from time to time**

Some Guiding Principles of Using Subvention

- Be good employer and set reasonable remuneration for staff while complying with the requirements of related Ordinances
- Set aside part of the grants for payment of Severance Payment/Long Service Payment as outstanding commitment for staff employed under constituent grants of OEBG/EOEBG
- Should not use the provision on fringe benefits for staff
- Observe related guidelines in procurement
- Observe COA, SAG, Circulars/CM and guidelines issued from time to time

References on Financial Management

School Administration and Management > Financial Management

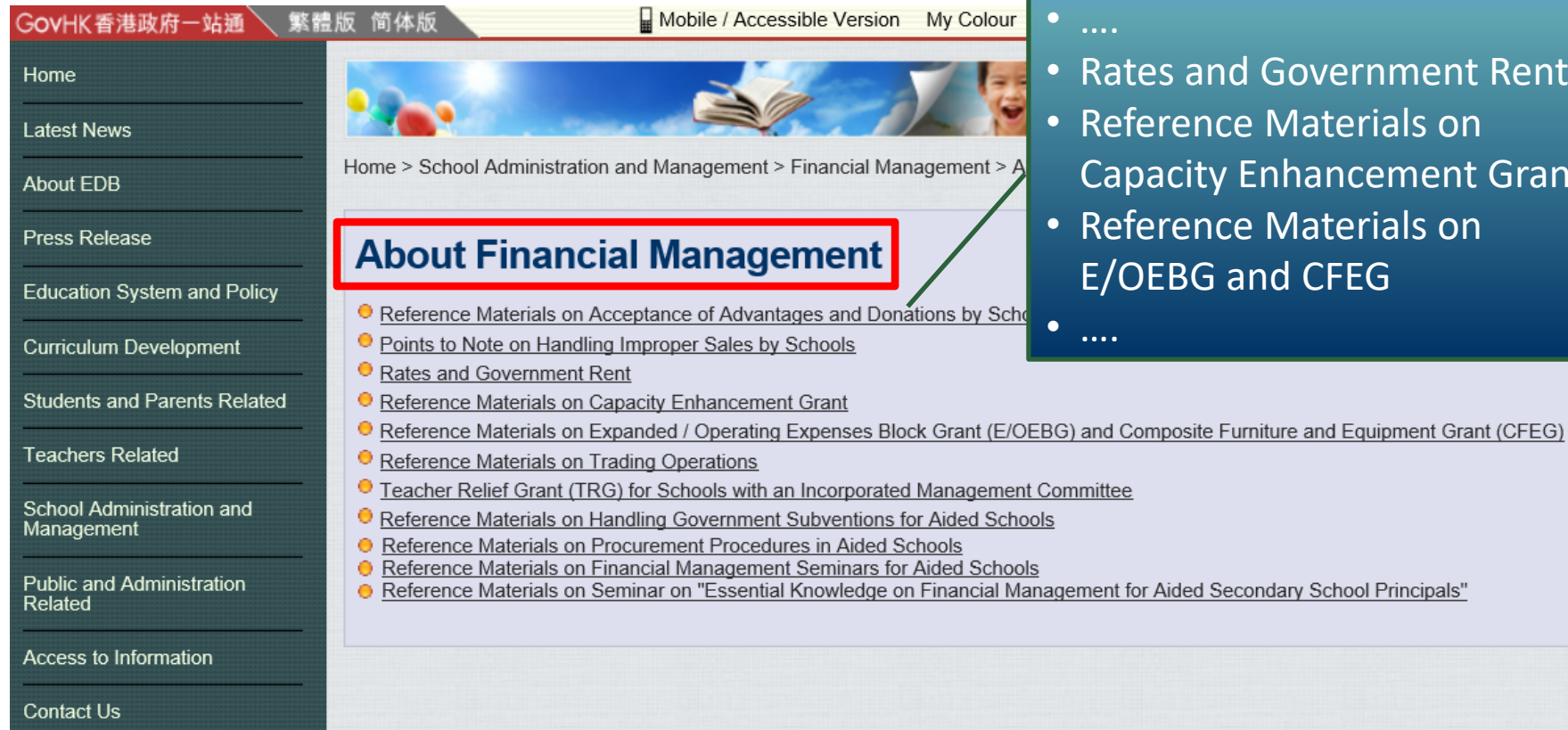
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References on Financial Management (2)

School Administration and Management > Financial Management >
About Financial Management

WebPage



GovHK 香港政府一站通 繁體版 简体版 Mobile / Accessible Version My Colour

Home > School Administration and Management > Financial Management > A

About Financial Management

-
- Rates and Government Rent
- Reference Materials on Capacity Enhancement Grant,
- Reference Materials on E/OEBG and CFEG
-

• [Reference Materials on Acceptance of Advantages and Donations by Schools](#)

• [Points to Note on Handling Improper Sales by Schools](#)

• [Rates and Government Rent](#)

• [Reference Materials on Capacity Enhancement Grant](#)

• [Reference Materials on Expanded / Operating Expenses Block Grant \(E/OEBG\) and Composite Furniture and Equipment Grant \(CFEG\)](#)

• [Reference Materials on Trading Operations](#)

• [Teacher Relief Grant \(TRG\) for Schools with an Incorporated Management Committee](#)

• [Reference Materials on Handling Government Subventions for Aided Schools](#)

• [Reference Materials on Procurement Procedures in Aided Schools](#)

• [Reference Materials on Financial Management Seminars for Aided Schools](#)

• [Reference Materials on Seminar on "Essential Knowledge on Financial Management for Aided Secondary School Principals"](#)

References on Financial Management (3)

School Administration and Management > Financial Management > Information on Subsidy > Reference Materials on E/OEBG and CFEG

WebPage

The screenshot shows the website page 'Reference Materials on E/OEBG and CFEG'. On the left is a navigation menu with categories like 'Press Release', 'Education System and Policy', 'Curriculum Development', 'Students and Parents Related', 'Teachers Related', 'School Administration and Management', 'Public and Administration Related', 'Access to Information', and 'Contact Us'. Below the menu are several promotional banners for 'Insider's Perspectives', 'School Management Committee', '2019 HKDSE Exam Results Release', 'New Milestone of Kindergarten Education', 'Kindergarten K1 Admission Arrangements', 'Prevention of Student Suicides', and '2019 Policy Address Public Consultation'. The main content area is titled 'Reference Materials on E/OEBG and CFEG' and contains several sections: 'User Guides' (with links to OEBG, EOEBG, and CFEG), 'Reminder Lists' (with links to OEBG and CFEG, and EOEBG), 'Rates' (with a link to OEBG), 'General Domain' (with links to Aided Secondary Schools and Aided Primary Schools), 'Special Domain' (with links to Aided Secondary Schools and Aided Primary Schools), and 'CFEG' (with a link to EOEBG). At the bottom, there is a link for 'Air-conditioning Grant for Aided Schools'. Three callout boxes are overlaid on the page: 'User Guides' (pointing to the User Guides section), 'Reminder Lists' (pointing to the Reminder Lists section), and 'Air-conditioning Grant for Aided Schools' (pointing to the Air-conditioning Grant for Aided Schools link).

User Guides

- OEBG
- EOEBG
- CFEG

Reminder Lists

- OEBG and CFEG
- EOEBG

Rates

- OEBG
- ...
- CFEG
- EOEBG
- ...

Air-conditioning Grant for Aided Schools

Accounting Arrangement and Procurement

會計安排和採購

Accounting Arrangement



- **Statutory requirements**
 - **R64 of the ER and S40BB of the EO**

IMC must keep proper books of accounts and other financial and accounting records
- **Separate bank accounts should be maintained for govt and school funds**
- **IMC should open and maintain, in its name, at least 2 accounts (one for govt funds and the other for non-govt funds), all bank accounts should be operated by jointly authorized signatories, same arrangement for internet banking**

Accounting Arrangement (2)



- A set of proper books of accounts should comprise items such as payment vouchers, fixed assets register, etc. (para.1 in Ch. 6.5.2 of SAG)
- All entries should be validated by vouchers with supporting documents
- An annual income and expenditure account and balance sheet should be prepared for external auditing
- The accounting system should be transparent to facilitate internal and external control

Accounting Arrangement (3)



- **IMC is required to prepare its annual financial statements**
- **IMC is required to appoint an accountant as the auditor (S.40BB of the EO)**
- **The audited financial statements together with the auditor report shall be submitted to the PS(Ed) within 6 months after the year end date of the school (S.40BB of the EO, EDBCM No. 160/2019)**

Procurement of Stores and Services

Guiding principles

- **As the stores and services are procured out of public funds, IMC is publicly accountable for the conduct of its affairs and related expenditures**
- **IMC should ensure their schools have put in place**
 - **a fair, open and transparent system of procurement procedures and**
 - **there are adequate checks and balances**

Procurement of Stores and Services (2)

Guiding principles (cont')

- **The designated purpose(s) of each government grant must be met**
- **The “Guidelines on Procurement Procedures in Aided Schools” (EDBC 4/2013) must be observed and strictly followed**

Procurement of Stores and Services (3)

Financial limits	Procurement arrangements	Approving authorities
\$5,000 or below	Competitive bidding not required for procurement of any stores or services provided that a member of school staff at an appropriate level certifies that such procurement is essential and the prices are fair and reasonable	Principal/Deputy Head <i>[Note: For schools without Deputy Head, the approving authority rests with the principal.]</i>
Above \$5,000 to \$50,000	By oral quotations (at least two)	
Above \$50,000 to \$200,000	By written quotations (at least five)	Principal
Above \$200,000	By tenders (at least five)	TAC comprising the SV/Manager, the Principal, a teacher and a rep of the PTA or a parent manager

Procurement of Stores and Services (4)

Some DOs

- ✓ Inform suppliers/contractors in writing that the offer of advantages to school staff is illegal
- ✓ Declaration of conflict of interest
- ✓ Items of stores and services of the same category should be grouped in the same quotation/tender schedule before inviting suppliers to bid
- ✓ Selection of the lowest offer/highest overall score offer if marking scheme is adopted

Procurement of Stores and Services (5)

Some DON'Ts

- ✘ Evasion of the financial limits by dividing procurement requirements into instalments or by reducing the usual duration of contracts
- ✘ Based on the monthly instead of the overall amount in determining the financial limit when carrying out procurement
- ✘ Rejecting the lowest offer of written quotation/tender without reason(s)

Procurement of Stores and Services (6)

Reference materials

- **EDBC No. 4/2013**
- **School Administration Guide (S6.4)**
- **Guide to Financial Management for Aided Schools Operated by IMC**
EDB Homepage > Sch Admin and Mgt > School-based Mgt > Corner for IMC Schools > Financial Mgt
- **Relevant reference on financial issues (3 documents)**
EDB Homepage > Sch Admin and Mgt > Regulations > Checklist on Common Admin Issues in Aided Schools
- **Checklist on Procurement Procedures in Aided Schools**
EDB Homepage > Sch Admin and Mgt > Financial Mgt > About Financial Mgt > Ref Materials on Procurement Procedures in Aided Schools

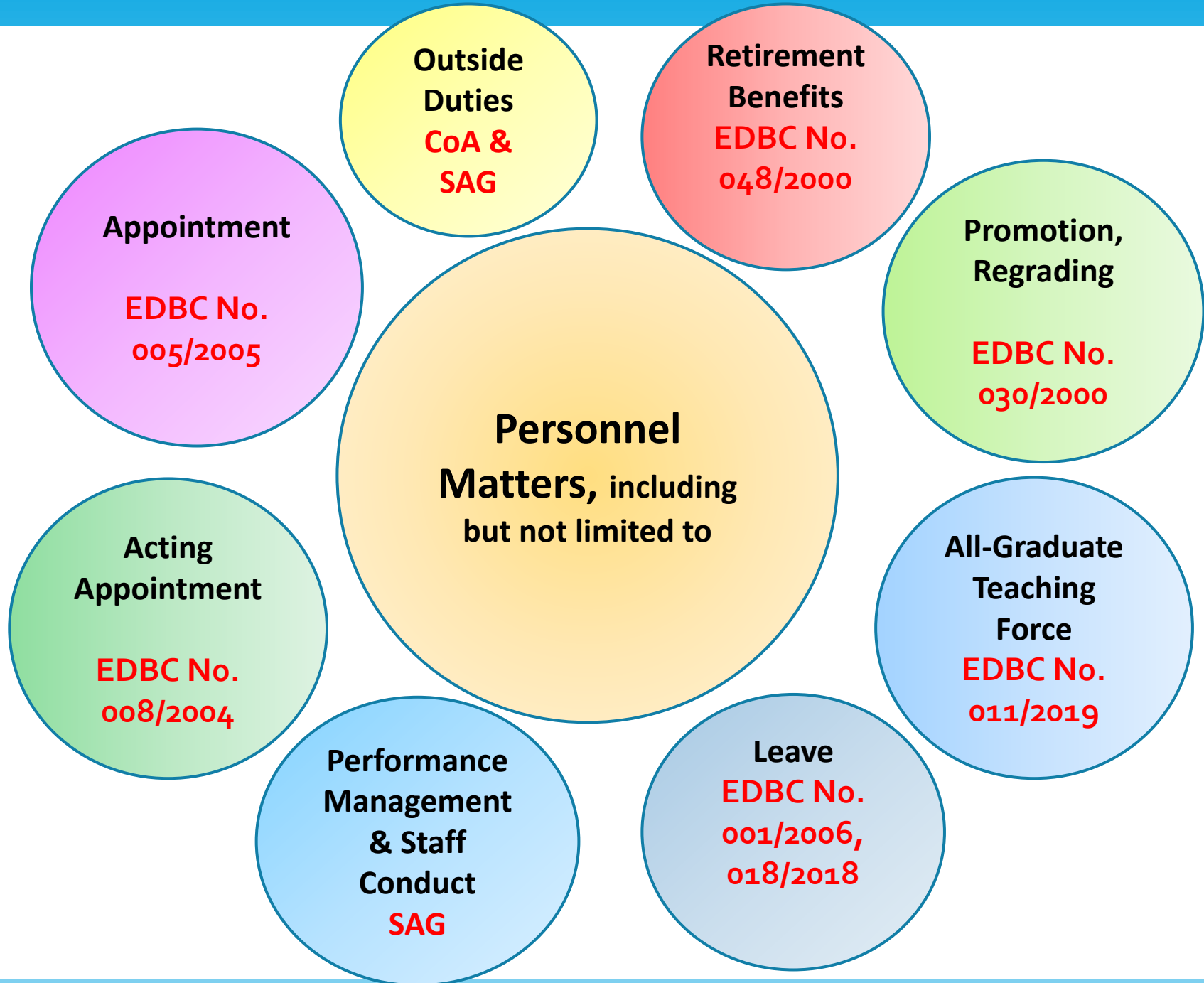
Human Resources Management

人力資源管理

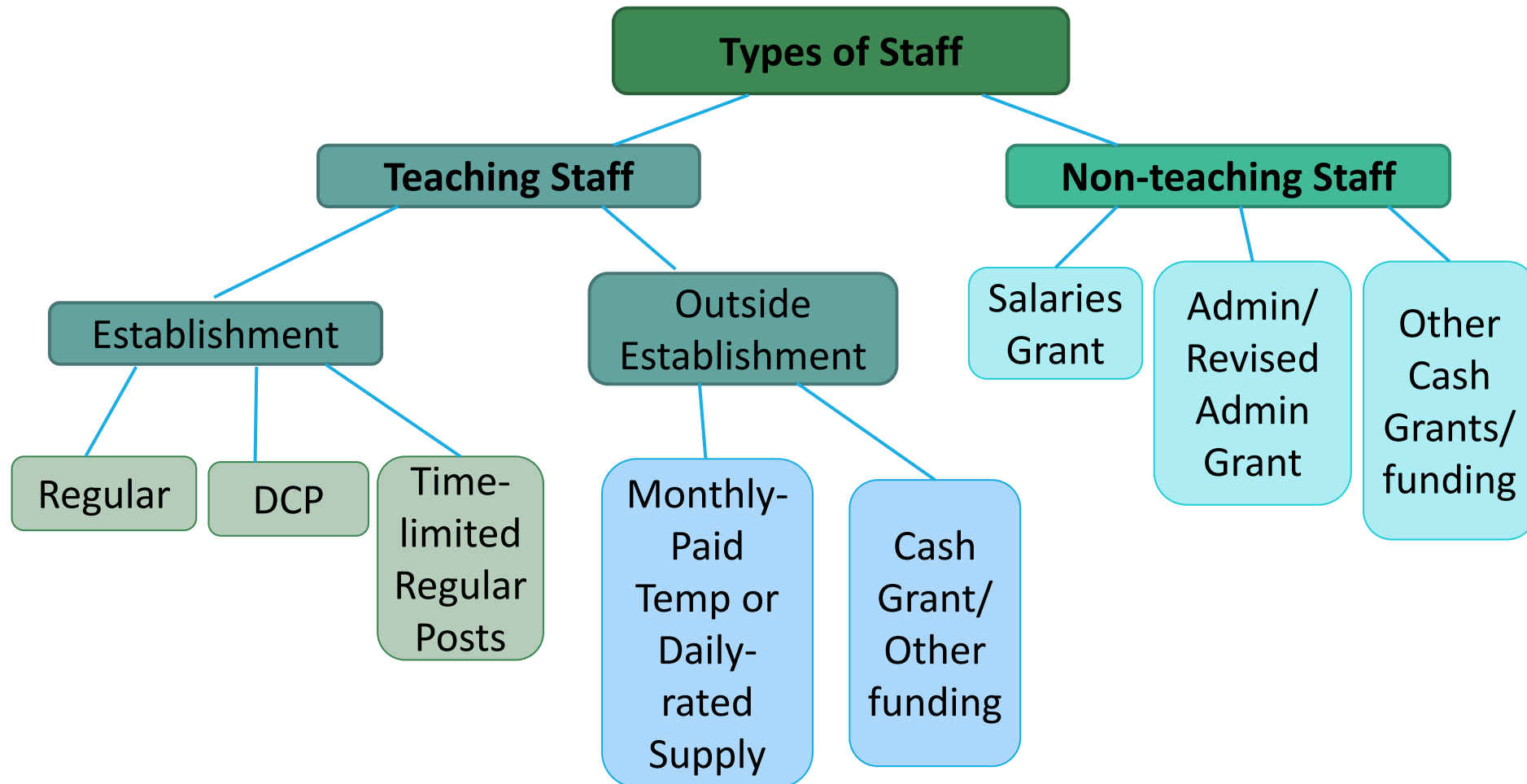
Personnel Matters

(I) General Principles

- The SMC (校董會)/IMC (法團校董會) is responsible for the management of a professional team of teaching and non-teaching staff in school.
- The SMC/IMC should exercise Employer's autonomy & responsibilities
- There should be explicit policies & procedures
- Policies & procedures must be fair and open
- Avoid any actual/perceived conflict of interest
- Avoid allegations of favoritism
- In accordance with relevant Ordinance, regulations, Codes of Aid, standing circulars and guidelines



Types of Staff in Aided Schools



Staff Recruitment

(II) General Proper Procedures

- ✓ Formulate pre-determined and objective assessment criteria and specific procedures endorsed by SMC/IMC
- ✓ Conduct open recruitment
- ✓ Form an independent selection panel comprises a good representation of stakeholders (in odd number)
- ✓ Consider all eligible applications
- ✓ Assess the suitability of applicants
- ✓ Keep a proper record of the assessment results
- ✓ Form Review Panel to handle appeals

**Please refer to Appendix 4 of Chapter 7 of SAG (學校行政手冊)
- Checklist for recruitment procedures**

Staff Recruitment - Approval of PS(Ed)

	SMC Schools	IMC Schools
Appointment and promotion of staff, regrading of teachers	x	x
School Head	✓	✓
Direct Appointment of Staff to Promotion Ranks	✓	x
Staff above the age of sixty	✓	✓
Temporary Native English Teachers	✓	✓

Staff Recruitment

Related Legislation and Regulations governing appointment

- Education Regulations (ER, 教育規例) (R76 & R77)
- Codes of Aid (CoA, 資助則例)
- Instructions issued by PS(Ed) from time to time (circulars, guidelines, SAG, letters, etc.)
- Employment Ordinance
- Other ordinances such as anti-discrimination ordinances, Personal Data (Privacy) Ordinance
- Sexual Conviction Record Check
- Policy for preventing sexual harassment

Appointment Matters

School Administration and Management > Administration > About School Staff > Appointment Matters

WebPage

GovHK 香港政府一站通 繁體版 简体版 Mobile / Accessible Version My Colour A A A Enter search keyword(s) Site Map

Home > School Administration and Management > Administration > About School Staff > Appointment Matters

Appointment Matters

Circular

- [EDBC No. 5/2005](#)

Measures for Strengthening the Protection of Students: Appointment Matters of Schools

- [EDBC No. 16/2017](#)

Sexual Conviction Record Check (SCRC) Scheme

- [EDBCM No. 179/2011](#) (for Schools other than Private Schools Offering Non-formal Curriculum)
- [EDBCM No. 180/2011](#) (for Private Schools Offering Non-formal Curriculum)
- [Questions & Answers](#) compiled by EDB (UPDATE in May 2012)
- [Frequently Asked Questions](#) compiled by Hong Kong Police Force (UPDATE)

Note: For details of the scheme (such as protocol, application procedures and a template for documentary proof of possible employment related to children or mentally incapacitated persons from employers), please visit the [SCRC Website](#).

Points to Note / Codes of Practice on Employment

- [Matters relating to Medical and Health Condition of Staff in Schools](#)
- [Code of Practice on Employment under the Sex Discrimination Ordinance](#) (Link to the Equal Opportunities Commission website)
- [Code of Practice on Employment under the Disability Discrimination Ordinance](#) (Link to the Equal Opportunities Commission website)
- [Family Status Discrimination Ordinance Code of Practice on Employment](#) (Link to the Equal Opportunities Commission website)
- [Race Discrimination Ordinance Code of Practice on Employment](#) (Link to the Equal Opportunities Commission website)
- [Code of Practice against Discrimination in Employment on the Ground of Sexual Orientation](#) (Link to the Constitutional and Mainland Affairs Bureau website)

Sexual Conviction Record Check (SCRC) Scheme

Points to Note / Codes of Practice on Employment

School Administration and Management > Administration > About School Staff > Appointment Matters

The screenshot shows a website interface for 'Appointment Matters' under 'About School Staff'. The page is divided into several sections, with three red boxes highlighting specific content. Three yellow callout bubbles point to these boxes, providing descriptions of the highlighted content.

- Samples:** A list of document samples including 'Letter offering Appointment', 'Conditions of Service', 'Letter of Acceptance', 'Certificate of Service', 'Letter for Resignation/Retirement of Teacher', 'Letter for Resignation/Retirement of Non-teaching Staff', and 'Promotion of Laboratory Technician'. Each item includes an 'UPDATE' icon and a date.
- Appointment Forms:** A list of forms for teaching and non-teaching staff, including 'Appointment Forms of Teaching Staff in Aided Schools' (with sub-items for Primary, Secondary, and Special Schools) and 'Appointment Forms of Non-teaching Staff in Aided Schools'. Each item includes an 'UPDATE' icon and a date.
- Appointment Related Forms:** A list of forms for teaching staff and specialists, including 'Staff Promotion', 'Acting Appointment (for Substantive Appointment)', 'Acting Appointment (for Administrative Convenience)', 'Acting Appointment (Notification of Change in Acting-up Rate from 90% to 100%)', 'Regrading to Graduate Teachers in Secondary Schools', and 'Regrading to Graduate Teachers in Primary Schools'. Each item includes an 'UPDATE' icon and a date.

Callout bubbles provide the following descriptions:

- Top bubble:** Samples: Letter offering Appointment, Letter of Acceptance, Cert. of Service, etc.
- Middle bubble:** Appointment Form
- Bottom bubble:** Promotion Form, Acting Appointment Form, Regrading Form, etc.

Notes for completing and submitting the Appointment Forms

- Appointment Forms of Teaching Staff in Aided Schools
 - Aided Primary Schools (UPDATE in September 2017)
 - Notes for Completing the Form with Worked Example (UPDATE in September 2017)
 - Aided Secondary Schools (UPDATE in September 2017)
 - Notes for Completing the Form with Worked Example (UPDATE in September 2017)
 - Aided Special Schools (UPDATE in September 2017)
 - Notes for Completing the Form with Worked Example (UPDATE in September 2017)
 - Notification of Changes in Teacher's Personal Data (UPDATE in July 2015)
- Appointment Forms of Non-teaching Staff in Aided Schools (UPDATE in July 2015)
 - Aided Primary Schools
 - Aided Secondary Schools
 - Aided Special Schools
 - Notification of Changes in Non-teaching Staff Record (UPDATE in July 2015)

- Teaching Staff in
 - Aided Primary Schools
 - Aided Secondary Schools
 - Aided Special Schools

- Non-teaching Staff in
 - Aided Primary Schools
 - Aided Secondary Schools
 - Aided Special Schools

- Complete and send the appointment form(s) for teaching and non-teaching staff to **the Funds Section**
- Forward a copy of relevant form(s) to **respective Senior School Development Officers of school**
- Keep school's own record(s)

Personal Data (Privacy) Ordinance – Points to Note

School Administration and Management > Administration > About School

WebPage

The screenshot shows the Education Bureau website interface. At the top, there is a navigation bar with 'GovHK 香港政府一站通', language options (繁體版, 简体版), and utility links like 'Mobile / Accessible Version', 'My Colour', 'AA', and a search bar. A left sidebar contains a menu with categories like 'Home', 'Latest News', 'About EDB', 'Press Release', 'Education System and Policy', 'Curriculum Development', 'Students and Parents Related', 'Teachers Related', 'School Administration and Management', and 'Public and Administration Related'. The main content area features a banner image of children and a breadcrumb trail: 'Home > School Administration and Management > Administration > About School'. A 'Print' button is visible. The 'About School' section lists various topics, with 'Personal Data (Privacy) Ordinance, Cap. 486- Points to Note' highlighted by a red rectangular box. A yellow speech bubble points to this box with the text 'Personal Data (Privacy) Ordinance – Points to Note'.

GovHK 香港政府一站通 繁體版 简体版 Mobile / Accessible Version My Colour AA Enter search keyword(s) Site Map

Home > School Administration and Management > Administration > About School

About School

- [Effective Use of Resources in Schools](#)
- [Prevention of Communicable Diseases in Schools](#)
- [Meal Arrangements in School](#)
- [School Safety & Insurance](#)
- [Prevention of Sexual Harassment in Schools](#)
- **[Personal Data \(Privacy\) Ordinance, Cap. 486- Points to Note](#)**
- [Unsolicited Electronic Messages Ordinance \(Chapter 595\) - Points to Note](#)
- [Enhanced Measures of the Voluntary Optimisation of Class Structure Scheme](#)
- [Development Options for Secondary Schools \(Applicable to Aided, Caput and Government Secondary Schools\)](#)
- [Reducing Lead Exposure](#)
- [Sister School Scheme](#)
- [Green Roofs](#)

Prevention of Sexual Harassment

School Administration and Management > Administration > About School > Prevention of Sexual Harassment in Schools

WebPage

The screenshot shows the EDB website page for 'Prevention of Sexual Harassment in Schools'. The page has a navigation menu on the left with categories like Home, Latest News, About EDB, Press Release, Education System and Policy, Curriculum Development, Students and Parents Related, Teachers Related, School Administration and Management, Public and Administration Related, Access to Information, and Contact Us. The main content area features a breadcrumb trail: Home > School Administration and Management > Administration > About School > Prevention of Sexual Harassment in Schools. The title 'Prevention of Sexual Harassment in Schools' is highlighted with a red box. Below the title is a 'Background' section. A yellow callout bubble points to the text 'Equal Opportunities Commission (EOC)'s framework for Sexual Harassment Policies in Schools'. The background text states that the Sex Discrimination Ordinance (SDO) amendment of 2008 applies to schools, making them vicariously liable for sexual harassment. It advises schools to refer to the EOC's website for the relevant SDO sections and provides a link (http://www.eoc.org.hk). Below the background text is a section titled 'Questions & Answers on Preventing Sexual Harassment in Schools and Brief Outline of a School Policy', which includes two links: 'Q&As on Preventing Sexual Harassment in Schools' and 'The EOC's Framework for Sexual Harassment Policies in Schools', both updated in November 2013. The second link is also highlighted with a red box.

GovHK 香港政府一站通 繁體版 简体版 Mobile / Accessible Version My Colour AA Enter search keyword(s) Site Map

Home > School Administration and Management > Administration > About School > Prevention of Sexual Harassment in Schools

Prevention of Sexual Harassment in Schools

Background

Consequent to the amendment to the Sex Discrimination Ordinance (SDO) that came into effect on 3 October 2008, a sexual harassment act committed by any person that creates a hostile or intimidating environment also applies to educational settings. It is the responsibility of schools to ensure that all individuals (including all students, staff members, voluntary helpers, contract workers/ service providers/ agents) are able to enjoy their activities or work or provide services in a safe and sexually hostile-free environment. At the same time, apart from the personal liability to be borne by individuals for an unlawful acts of sexual harassment, the schools being employers of the staff concerned may also be vicariously liable.

As advised by the Equal Opportunities Commission (EOC), schools should proactively create a sexually hostile-free environment to ensure that the school is free from any sexually hostile or intimidating environment and to avoid the possible vicarious liability on the employers, including developing a school policy (in written form) on sexual harassment, raising the understanding and awareness of both staff and students about sexual harassment and setting up complaint handling mechanism to resolve sexual harassment complaints.

Schools may refer to the relevant amended sections of the SDO at the EOC's website (<http://www.eoc.org.hk>).

Questions & Answers on Preventing Sexual Harassment in Schools and Brief Outline of a School Policy

- Q&As on Preventing Sexual Harassment in Schools (Updated in November 2013)
- The EOC's Framework for Sexual Harassment Policies in Schools (Updated in November 2013)

More References on EDB Website

教育局網站的一些參考資料

Education Ordinance (EO, 教育條例) & Education Regulations (ER, 教育規例)

Home > About EDB > Press Release > LegCo Business > Education Ordinance > Education Ordinance and Subsidiary Legislation

WebPage

The screenshot shows the Education Bureau website. The top navigation bar includes 'GovHK 香港政府一站通', language options (繁體版, 简体版), and utility links like 'Mobile / Accessible Version', 'My Colour', 'AA', and a search bar. The left sidebar menu has 'About EDB' highlighted with a red box. The main content area shows the breadcrumb trail 'Home > About EDB > Press Release > LegCo Business > Education Ordinance > Education Ordinance and Subsidiary Legislation'. A green box highlights the page title 'Education Ordinance and Subsidiary Legislation' and a list of links: 'Education Regulations', 'Education (Exemption) (Private Schools Offering Non-formal Curriculum) Order', 'Grant Schools Provident Fund Rules', and 'Subsidized Schools Provident Fund Rules'. A green arrow points from the 'Education Regulations' link in the list to the 'Education Regulations' text in the green box.

School Administration and Management

Education Bureau
The Government of the Hong Kong Special Administrative Region

GovHK 香港政府一站通 繁體版 简体版 Mobile / Accessible Version My C

Home
Latest News
About EDB
Press Release
Education System and Policy
Curriculum Development
Students and Parents Related
Teachers Related
School Administration and Management
Public and Administration Related
Access to Information
Contact Us

Home > [School Administration and Management](#)

Regulations
Administration
Financial Management
School-based Management
School Management Committee/ Incorporated Management Committee Service Agreement

Regulations:

- Codes of Aid
- School Administration Guide
- Checklist on Common Administrative Issues in Aided Schools

Quality Assurance for Schools
School Premises Related Information
Policy Documents
Year Planner

Codes of Aid (CoA, 資助則例)

School Administration and Management > Regulations > Codes of Aid

WebPage

GovHK 香港政府一站通 繁體版 简体版 Mobile / Accessible Version My Colour A A A Enter search keyword(s) Site Map

Home > School Administration and Management > Regulations > Codes of Aid

Codes of Aid

- Code of Aid for Primary Schools (September 1994) [html] [pdf]
- Code of Aid for Secondary Schools (September 1994) [html] [pdf]
- Code of Aid for Special Schools (November 1998) [html] [pdf]
- Code of Aid for Special Schools, Volume II (Practical Schools and S
- Guidelines and Forms related to Codes of Aid for Aided Primary, Se
- Code of Aid and Related Documents for Aided IMC Schools

Replaced Appendix 2 for Reference

- Appendix 2 of Code of Aid for Secondary Schools (as at 31 August 2009) [pdf]
- Appendix 2 of Code of Aid for Secondary Schools (as at 31 August 2017) [pdf]
- Appendix 2 of Code of Aid for Primary Schools (as at 31 August 2017) [pdf]
- Appendix 2 of Code of Aid for Special Schools (as at 31 August 2009) [pdf]
- Appendix 2 of Code of Aid for Special Schools (as at 31 August 2017) [pdf]

Home Latest News About EDB Press Release Education System and Policy Curriculum Development Students and Parents Related Teachers Related **School Administration and Management** Public and Administration Related Access to Information Contact Us

• CoA for Primary Schools

• CoA for Secondary Schools

• CoA for Special Schools

• CoA and Related Documents for Aided IMC Schools

School Administration Guide (SAG, 學校行政手冊)

School Administration and Management > Regulations >
School Administration Guide

WebPage

The screenshot shows the 'School Administration Guide' page on the EDB website. The page header includes 'GovHK 香港政府一站通', language options (繁體版, 简体版), and utility links like 'Mobile / Accessible Version', 'My Colour', 'AA', and a search bar. A left sidebar contains navigation links such as 'Home', 'Latest News', 'About EDB', 'Press Release', 'Education System and Policy', 'Curriculum Development', 'Students and Parents Related', 'Teachers Related', 'School Administration and Management' (highlighted with a red box), 'Public and Administration Related', 'Access to Information', and 'Contact Us'. The main content area features a banner with balloons and an open book, followed by a breadcrumb trail: 'Home > School Administration and Management > Regulations > School Administration Guide'. Below this, the title 'School Administration Guide' is displayed. Three links are listed: 'School Administration Guide (2019/20) (applicable to aided schools)', 'Updated items of School Administration Guide (2019/20 school year)', and 'Supplement to School Administration Guide (applicable to aided IMC schools only)' with an 'UPDATE' icon. A callout box on the right lists: 'School Administration Guide', 'Updated items of SAG', and 'Supplement to SAG (applicable to aided IMC schools only)'. A green arrow points from the callout box to the 'Supplement to School Administration Guide' link.

School Administration Guide (2)

【Points to Note】

- This Guide is applicable to aided schools.
- The term “School Management Committee” (SMC) in this Guide covers the Incorporated Management Committee (IMC).
- Schools should also make reference to the Education Ordinance, Education Regulations, Codes of Aid and the relevant legislations in Hong Kong.
- Aided IMC schools should read this Guide in conjunction with the [“Supplement to the School Administration Guide”](#).
- The Education Bureau circulars/ circular memoranda mentioned in the various chapters of this Guide are highlighted in **RED**. The relevant circulars/ circular memoranda can be searched and retrieved via the [“Circular”](#) section in “About EDB” at EDB homepage.
- Hyperlinks provided in this Guide are highlighted in **BLUE**.

School Administration Guide (3)

- 1. School-based Management**
- 2. Learning and Instructional Matters**
- 3. Student Matters**
- 4. Home-School-Community Partnership**
- 5. Planning, School Self-evaluation and Budgeting**
- 6. School Finance Matters**
- 7. Personnel Matters**
- 8. School Premises and Safety**

Circular Search

About EDB > Circulars

The screenshot shows the EDB website interface. At the top, there is a header with the text "GovHK 香港政府一站通" and "繁體版 简体版". To the right of the header, there are links for "Mobile / Accessible Version", "My Colour", "A A A", and a search bar with the text "Enter search keyword(s)". There is also a "Site Map" link and an email icon.

On the left side, there is a vertical navigation menu with the following items: Home, Latest News, About EDB (highlighted with a red box), Press Release, Education System and Policy, Curriculum Development, Students and Parents Related, Teachers Related, School Administration and Management, Public and Administration Related, Access to Information, and Contact Us.

The main content area shows a breadcrumb trail: "Home > About EDB". Below this, there are several dropdown menus. The "Circulars" link is highlighted with a red box. Other dropdown menus include "Bureau's Information", "Policy Highlights", "Press Release / LegCo Business / Others", "Publications and Statistics", and "Annual Open Data Plans". There is also a "Print" button in the top right corner of the main content area.

Circular Search (2)

About EDB > Circulars > About Circular

WebPage

The screenshot shows the EDB Circular Search page. The header includes the GovHK logo, language options (繁體版, 简体版), font size (AAA), a search bar, and links for Site Map and email. The left sidebar contains navigation links: Home, Latest News, About EDB, Education System & Policy, Curriculum Development, Students & Parents Related, Teachers Related, School Administration & Management, Public & Administration Related, Access to Information, and Contact Us. The main content area has a breadcrumb trail: Home > About EDB > Circular. Below this is the title 'Circular' and a note that all circulars are in PDF format. A section titled 'Newly Issued Circulars in the Last Seven Days' includes instructions to select a school type from a dropdown menu and click 'Browse'. At the bottom, there is a search bar with a 'Search' button and a 'Clear' button. Three blue callout boxes with green arrows point to the dropdown menu, the 'Search' button, and the 'Newly Issued Circulars in the Last Seven Days' section.

GovHK 香港政府一站通 繁體版 简体版 AAA Enter search keyword(s) Site Map

Home > About EDB > Circular

Circular

All circulars are in Acrobat Portable Document File (PDF) format. Please download and install Acrobat Reader to view these files.

For enquiry about the circulars, please contact respective subject officer.

Newly Issued Circulars in the Last Seven Days

Please select your school type in distribution list and click the Browse button to view circulars, just click the Browse button directly.

By School Type: <-- All -->

Search Clear

Newly Issued Circulars in the Last Seven Days

Select relevant school type, or use the default "All"

Search

Circular Search (3)

WebPage

The screenshot shows the 'Circular Search' interface. On the left, there is a sidebar with various news items and links. The main content area contains a search form with the following fields and options:

- Keyword Search:** A text input field for entering search terms.
- By School Type:** A dropdown menu currently set to '<-- All -->'. A callout box labeled 'School Type' points to this dropdown.
- Type of Circular:** A dropdown menu currently set to '<-- All -->'. A callout box labeled 'Type of Circular:' points to this dropdown, listing 'EDB Circular' and 'EDB Circular Memorandum'.
- Circular Number:** A text input field for entering a specific circular number, with a callout box labeled 'Circular Number' providing the example 'e.g. 001/2019'.
- Period of Issuing Circulars:** Two text input fields labeled 'From:' and 'To:'. A callout box labeled 'Period of Issuing Circulars' points to the 'From:' field. Below these fields, an example is provided: '(e.g. From 1/1/2007 to 31/12/2007)'. A callout box labeled 'Search' points to the search button.

At the bottom of the page, there are two buttons: 'Search' and 'Clear'.

Annotations on the page include:

- 'Input one or more items to search' pointing to the Keyword Search field.
- 'Keyword' pointing to the Keyword Search field.
- 'School Type' pointing to the By School Type dropdown.
- 'Type of Circular:' pointing to the Type of Circular dropdown, listing 'EDB Circular' and 'EDB Circular Memorandum'.
- 'Circular Number' pointing to the Circular Number field, with the example 'e.g. 001/2019'.
- 'Period of Issuing Circulars' pointing to the From: field.
- 'Search' pointing to the Search button.

Checklist on Common Administrative Issues in Aided Schools

School Administration and Management > Regulations >
Checklist on Common Administrative Issues in Aided Schools

WebPage

GovHK 香港政府一站通 繁體版 简体版 Mobile / Accessible Version My Colour AAA Enter search keyword(s) Site Map

Home
Latest News
About EDB
Press Release
Education System and Policy
Curriculum Development
Students and Parents Related
Teachers Related
School Administration and Management
Public and Administration Related

Home > School Administration and Management > Regulations > Checklist on Common Administrative Issues in Aided Schools

Checklist on Common Administrative Issues in Aided Schools

[Checklist on Common Administrative Issues in Aided Schools](#) (updated 29.3.2019) **Checklist**

Relevant Reference Files on Financial Issues:

1. [Report on Financial and Personnel Matters Approved by SMC/IMC for Aided Schools](#) (updated 26.7.2017)
2. [Points to Note on Financial Management of Aided Schools](#) (updated 10.3.2016)
3. [Exception Report on Procurement Activities for Aided Schools](#) (updated 30.4.2013)

Checklist on Common Administrative Issues in Aided Schools (2)

I. Staffing Issues

(appointment, acting appointment, regrading, promotion, leaves, remuneration, resignation, retirement, ...)

II. School Administration Issues

(school premises and facilities, other general items)

III. Financial Issues

(procurement, trading operation, school income, government subvention)

IV. Student Issues

Checklist on Common Administrative Issues in Aided Schools (3)

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
(I) Staffing Issues			
(A) Appointment			
1. Appointment of teaching staff (excluding school head and certain types of staff as specified in Codes of Aid)	School	School	EO S42, S44, S45, S46, S47, S48, S49, S50, S51, S52 ER R68, R69, R70, R76(1), R77, R78 COA S49-S56, App 2A, App 2/Att A1-A2, App 3, App 5/Att C-I, App 6 para 4, App 9 [P]; S48-S56, App 2, App 2/Att A, App 2/Att B, App 2/Att C, App 3, App 4, App 4/Att C-I, App 5, App 8, App 9 para 4-6 [S]; S54-S61, App 2 S2, App 4B, App 6 [Sp]; S13.1(c) & S13.2(a) [A]; S1 & S4 [Comp] SAG S7.2.1, S7.3-S7.4, App 2, 3 & 4 of Chap 7 GSA Relevant sections as applicable (Pri) (Sec) Cir EDBC No. 5/2005, 12/2016, 16/2017 EDBCM No. 179/2011, 133/2018 WSite http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html

Links to related rules/sections of the EO, ER, COA, SAG, Circular, etc.

Contact Us

Contact Us > Hotline and Important Contact Points / Regional Education Offices

WebPage

GovHK 香港政府一站通 繁體版 简体版

Mobile / Accessible Version My Colour A A A Enter search keyword(s) Site Map

Home > [Contact Us](#) Print

EDB Hotline and Important Contact Points

Regional Education Offices

EDB Telephone Directory

General Enquiry

Home

Latest News

About EDB

Press Release

Education System and Policy

Curriculum Development

Students and Parents Related

Teachers Related

School Administration and Management

Public and Administration Related

Access to Information

Contact Us

Regional Education Offices (REO)

HK REO:

- C&W
- Sou
- WCh
- Islands
- HKE

NTE REO:

- TP
- North
- ST

Hong Kong Regional Education Office		
Address	Enquiry	Fax
3/F, 14 Taikoo Wan Road, Taikoo Shing, Hong Kong	2863 4646	2865 0658
District School Development Sections		
District	Enquiry	Fax
Central & Western District	2863 4678	2543 3051
Southern District	2863 4664	2865 0491
Wan Chai District	2863 4626	2572 0800
Islands District	2863 4634	2865 1458
Hong Kong East District	2863 4649	2865 1432
Kowloon Regional Education Office		
Address	Enquiry	Fax
Podium-1/F, East Block, Education Bureau Kowloon Tong Education Services Centre, 19 Suffolk Road, Kowloon Tong, Kowloon	3698 4108	2770 2012
District School Development Sections		
District	Enquiry	Fax
Kowloon City District	3698 4141	2715 6249
Sham Shui Po District	3698 4196	2720 9699
Sai Kung District	3698 4206	2783 0354
Kwun Tong District	3698 4178	2783 7521
Wong Tai Sin District	3698 4219	2782 6043
Yau Tsim & Mong Kok District	3698 4163	2781 0206
NT East Regional Education Office		
Address	Enquiry	Fax
22nd Floor, Landmark North, 39 Lung Sum Avenue, Sheung Shui, NT	2639 4876	2672 0357
District School Development Sections		
District	Enquiry	Fax
Tai Po District	2639 4856	2672 3747
North District	2639 4858	2676 0011
Sha Tin District	2639 4857	2602 2214
NT West Regional Education Office		
Address	Enquiry	Fax
19th Floor, Chinachem Tsuen Wan Plaza, 457 Castle Peak Road, Tsuen Wan, NT	2437 7272	2416 2750
District School Development Sections		
District	Enquiry	Fax
Kwai Chung & Tsing Yi District	2437 5433	2480 3614
Tsuen Wan District	2437 5457	2498 1923
Tuen Mun District	2437 5483	2416 5710
Yuen Long District	2437 7217	2416 3240

KIn REO:

- KC
- SSP
- SK
- KT
- WTS
- YTM

NTW REO:

- KwC&TY
- TW
- TM
- YL