

**COMPENDIUM  
TO  
CODE OF AID  
FOR  
AIDED SCHOOLS**

**(Release 1.11, September 2016)**

**Education Bureau**

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## Section 1

**Calculation of Staff Establishment**

1. This Section provides details about the criteria and basis for calculating the staff establishment of aided secondary, aided primary and aided special schools as follows:

**Section 1A – Staff Establishment of Aided Secondary Schools**

- |              |   |
|--------------|---|
| Attachment A | Teaching Staff Establishment            |
| Attachment B | Language Improvement Measures           |
| Attachment C | Manning Scale of Laboratory Technicians |

**Section 1B – Staff Establishment of Aided Primary Schools**

- |              |  |
|--------------|--|
| Attachment A | Teaching Staff Establishment in Schools Operating Bi-sessional Classes |
| Attachment B | Teaching Staff Establishment in Whole-day Schools                      |

**Section 1C – Staff Establishment of Aided Special Schools**

- |              |   |
|--------------|---|
| Attachment A | Ranking of Principal of Special Schools                               |
| Attachment B | Teaching Staff Establishment for Primary Classes in Special Schools   |
| Attachment C | Teaching Staff Establishment for Secondary Classes in Special Schools |

2. Schools operating combined levels of classes i.e. both secondary and primary classes such as “through-train” school, or combined session i.e. both whole-day and bi-sessional classes such as “mixed-mode” school, should refer to the relevant Sections and Attachments in calculating the staff entitlement of the school.
3. “Through-train” primary and secondary schools, though are considered as separate entities with respect to staffing establishment, can flexibly deploy teachers among the linked schools provided that the teachers concerned are kept within the approved establishment of their respective schools.
4. For a school that operates combined levels or sessions of classes where each of the level or session is entitled to a separate headship post in accordance with the calculation of teaching staff establishment, only one of the headship posts should serve as “Principal” as defined in the Education Ordinance, if the school is under one school registration.

## Section 1A

**Staff Establishment of Aided Secondary Schools****(I) Teaching Staff Establishment**1. Overall Establishment

Upon the implementation of the New Senior Secondary (NSS) academic structure from the 2009/10 school year, the teacher-to-class ratios<sup>1</sup> for secondary schools, as stipulated in the report “The New Academic Structure for Senior Secondary Education and Higher Education” published in May 2005, are revised as follows:

***From 2009/10 school year to 2011/12 school year (i.e. up to the double cohort year)***

- (a) 1.7 teachers per junior secondary class
- (b) 1.9 teachers per senior secondary class in the new system and S5 of the pre-NSS system
- (c) 2.3 teachers per S6 and S7 class of the pre-NSS system

***In and after 2012/13 school year***

- (a) 1.7 teachers per junior secondary class
- (b) 2.0 teachers per senior secondary class

Each school is provided with a Principal and its teaching staff entitlement is calculated according to its class organization and the corresponding teacher-to-class ratios. The teaching staff entitlement calculated should be retained at 1 decimal place.

The overall teaching staff entitlement of a school includes the additional teachers of appropriate grades as provided and specified in sub-paragraph 3 below.

*(updated on 1 September 2009)*

2. Graded Post within the Establishment

The ratio<sup>2</sup> of graduate teacher posts in aided secondary schools has been increased to 80% in 2008/09 school year and further to 85% in 2009/10 school year.

The number of posts in each grade should be determined by making reference to Attachment A.

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<sup>1</sup> Before the 2009/10 school year, the teaching staff ratios were 1.3 teachers per class for Secondary 1 – 5 and 2.0 teachers per class for Secondary 6 – 7. The revised teacher-to-class ratios, adopted from the 2009/10 school year have embedded the provision of additional teachers to all schools including the teachers for spilt class teaching, school librarian, additional Chinese Language teachers, additional teachers for remedial teaching, counselling and extra-curricular activities and additional non-graduate teachers under Education Commission Report No. 5.

<sup>2</sup> With effect from 1 September 2008, the previous upgrading provisions for Expansion of Graduate Posts in Secondary Schools and Graduate Posts for Practical, Technical or Cultural Subjects has been subsumed under the enhanced graduate teacher ratio.

*(updated on 1 September 2009)*

### 3. Additional Teachers

(a) Additional teachers of English are provided to individual schools which adopt Chinese as the medium of instruction for subjects other than language subjects, practical and technical subjects, Chinese History, Chinese Literature and English Literature. The purpose of the additional teachers is to help schools that adopt Chinese as the medium of instruction to strengthen the teaching of English. The eligibility for additional teachers of English is determined in accordance with the amount of Chinese language instruction offered. Details concerning the calculation of additional teachers of English are in Attachment B.

(b) Enhanced Native-speaking English Teacher (NET) Scheme  
NETs will be provided as additional English teachers regardless of the choice of medium of instruction (MOI), in the following scale –

<u>Total no. of Operating Classes</u>	<u>No. of additional NET</u>
Below 40	1
40 or above	2

One more NET may be employed to fill one of the additional English teacher posts at GM rank allocated to them in accordance with Attachment B.

*(updated on 1 April 2013)*

(c) With effect from 1 September 1996, new schools are provided with one additional Graduate Master/Mistress in the initial two years of operation.

(d) With effect from 1 September 2006, additional graduate teachers are provided to individual schools with academic low achievers in Secondary 1 – 3. An additional 0.7 Graduate Master/Mistress per class of territory bottom 10% students enrolled and an additional 0.3 Graduate Master/Mistress per class of territory Band 3 students enrolled not within the Bottom 10% are provided. From 2009/10 school year onwards, the calculated number of additional teacher should be retained at 1 decimal place.

*(updated on 1 September 2009)*

### 4. Fractional Graduate Master/Mistress (GM) Post

The fractional GM post is worked out by adding up the fractional entitlements, if any, in (I)1, i.e. overall establishment deduced from teacher-to-class ratios, and (I)3(d), i.e. additional teachers for schools with academic low achievers. Any whole number of the sum is added to the GM establishment. Both the fractional and whole number GM posts do not count towards the calculation of promotion posts and the graduate teacher ratio. School may keep the fractional GM post in the teaching staff establishment or opt for encashing the fractional GM post, which is calculated on the basis of the mid-point of GM teachers.

*(updated on 1 September 2009)*

## 5. Flexibility in Staff Structure

In view of the variety of curricula and of class organisations within the aided sector, the Incorporated Management Committee and the Principal of a school may propose for the approval of the Permanent Secretary a staff-structure for the school with a higher number of non-graduate posts than the standard manning scale subject to the following conditions –

(a) (i) Among the graduate teaching posts, the proportion of Senior Graduate Master/Mistress (SGM) and Principal Graduate Master/Mistress (PGM) posts should not exceed five-twelfths. This proportion excludes one Graduate Master/Mistress (GM) post upgraded to SGM in a secondary school with 15 or more classes with effect from 1 September 1994.

(ii) Among the non-graduate teaching posts, the proportion of Senior Assistant Master/Mistress (SAM) posts should not exceed one-quarter; and the combined proportion of SAM and Assistant Master/Mistress (AM) posts should not exceed one-half. The upgrading arrangement of an SAM post to a PAM post for a secondary school with 24 or more classes has ceased since 1 September 2008 upon the enhancement of the graduate teacher ratio.

Note: With effect from 1 September 2008, serving PAMs with a recognised degree plus teacher training (or equivalent) may apply for re-grading to SGMs to fill up new SGM posts created under the enhanced graduate teacher ratio. Upon successful re-grading or natural wastage of a serving PAM, the practice of upgrading an SAM post to a PAM post will cease with immediate effect. The respective proportions of SAM, AM and Certificated Master/Mistress (CM) posts will not be affected by the cessation of this practice. If a serving PAM teacher does not apply for re-grading to SGM, he/she can continue to be accommodated in his/her existing rank of PAM holding against an SGM post created under the enhanced graduate teacher ratio accordingly. *(updated on 1 September 2008)*

(iii) The proportion of graduate teaching posts should not exceed 85% of the teaching staff entitlement, calculated according to the approved teacher-to-class ratios. This proportion excludes the additional graduate and non-graduate teaching posts provided in paragraphs 3(a), (b), (c) and (d) and the GM posts in paragraph 4. *(updated on 1 September 2009)*

(iv) In calculating the proportions of promotion posts, posts provided for the Principal and those in paragraphs 3(b), (c) and (d) and 4 should be excluded, but additional teachers in paragraphs 3(a) should be included.

*(updated on 1 September 2009)*

- (b) No serving teacher's service may be terminated for the purpose of taking advantage of this provision.
- (c) When a staff structure of a school has been approved and implemented which involves a greater proportion of non-graduate teachers and additional AM or SAM posts beyond those provided on the above basis, the proportion of graduates should be raised as and when AM and SAM posts fall vacant. The Permanent Secretary may, however, approve the school to replace a departing Certificated Master/Mistress with a Graduate Master/Mistress to meet a demand for graduate teachers on justifiable grounds, subject to no overall increase in the number of promotion posts.

9. Workshop Teacher

In schools with workshops designed to accommodate 40 students, one workshop Certificated Master/Mistress (Workshop Teacher) may be appointed per workshop and one Assistant Master/Mistress (Workshop Teacher) post is provided for every 4 approved workshops. In schools with workshops designed to accommodate fewer than 40 students, split class teachers may be appointed.

**(II) Non-teaching Staff Establishment**

**A. Educational Psychologists**

1. The Education Bureau creates additional educational psychologist (EP) posts in aided ordinary schools and invites school sponsoring bodies (SSBs) to apply for these posts under the School-based Educational Psychology Service (SBEPS) starting from the 2008/09 school year. Each EP post awarded to the SSB is employed as a non-teaching specialist staff of a base school under its sponsorship to provide SBEPS for schools assigned by the Education Bureau and such schools are not limited to those belonging to the same SSB operating the base school.
2. The EP posts created in aided ordinary schools are combined establishment, with the ranks of EP I and II. Candidates having fully met the entry requirements for EP I, with at least 3 years of satisfactory service as an EP II, can be considered for direct appointment to EP I. Candidates not fully meeting the above criteria may be appointed as EP II, should they meet the entry requirements for this rank. Guides to appointment of EP I and II are stipulated in Sections 4.24 and 4.25 respectively and conditions for promotion of EP are stipulated in Section 4.25.

*(Updated on 24 May 2013)*

**B. Laboratory Technician**

The manning scale of Laboratory Technician is shown in Attachment C.



C. **Staff for Boarding Section (applicable to schools with an approved boarding section)**

An aided secondary school with an approved boarding section subvented by the Education Bureau may be provided with the following staff:

1. Warden

One warden at the rank of:

- (a) Social Work Officer for a boarding section with a capacity of more than 120 boarders; or
- (b) Chief Social Work Assistant or Assistant Social Work Officer for a boarding section with a capacity of 120 or fewer boarders.

2. Assistant Warden

An assistant warden at the rank of:

- (a) Assistant Social Work Officer for a boarding section with a capacity of more than 120 boarders; or
- (b) Senior Social Work Assistant for a boarding section with 60 – 120 boarders; or
- (c) Social Work Assistant for a boarding section with less than 60 boarders.

3. Boarding Service Master/Mistress I\*

Boarding Service Masters/Mistresses I to be appointed on the following scale:

<u>Week-day ratio</u>	<u>Week-end &amp; Sunday ratio (in addition to the week-day provision)</u>
1 for 60 boarders	0.5 for 60 or fewer boarders 1 for 61 – 120 boarders 1.5 for 121 or more boarders

4. Boarding Service Master/Mistress II\*

Boarding Service Masters/Mistresses II to be appointed on the following scale:

<u>Week-day ratio</u>	<u>Week-end &amp; Sunday ratio (in addition to the week-day provision)</u>
2 for 60 boarders	1 for 60 boarders

5. Clerical Staff

One clerical assistant to be appointed for each boarding section for the calculation of the amount of Administration Grant or the Revised Administration Grant as appropriate payable to it<sup>3</sup>.

<sup>3</sup> Schools that opt for the Administration Grant for their boarding section will pay the salaries of their clerical and janitor staff through the Administration Grant, and those that opt for the Revised Administration Grant will pay the salaries of their janitor staff through the Revised Administration Grant and the actual salaries of the other staff through the Salaries Grant.

6. Cook

Cooks to be appointed on the following scale:

<u>Number of boarders</u>	<u>Number of cooks</u>
39 or less	2
40 – 79	3
80 or more	4

7. Watchman

Two watchmen for each boarding section.

8. Janitor Staff \*

Janitor staff to be appointed on the following scale for the calculation of the amount of Administration Grant or the Revised Administration Grant as appropriate payable to it<sup>4</sup>:

<u>Week-day ratio</u>	<u>Week-end &amp; Sunday ratio</u> (in addition to the week-day provision)
1 for 100 boarders	0.6 for 100 or fewer boarders

- \* Guidelines in calculating the number of staff of Boarding Service Masters/Mistresses I, Boarding Service Masters/Mistresses II and Janitor Staff –
- Individual fractions of these three grades will be added together and the fraction resulting, if any, will be rounded up to the next whole number;
  - When fraction arises in either rank of boarding service master/mistress I and boarding service master/mistress II, it will be rounded up to the next whole number of boarding service master/mistress I; when fractions arise in both ranks of boarding service master/mistress I and boarding service master/mistress II, the fraction in boarding service master/mistress I will be rounded up and the fraction in boarding service master/mistress II will be rounded down;
  - The difference between the total number of the three grades calculated as per paragraph (a) above and the total number of boarding service master/mistress I and boarding service master/mistress II calculated as per paragraph (b) above is to be appointed as janitor staff.

<sup>4</sup> Schools that opt for the Administration Grant for their boarding section will pay the salaries of their clerical and janitor staff through the Administration Grant, and those that opt for the Revised Administration Grant will pay the salaries of their janitor staff through the Revised Administration Grant and the actual salaries of the other staff through the Salaries Grant.

## Section 1A/ Attachment A

**Teaching Staff Establishment  
in Aided Secondary Schools**

(The number of posts in the table below includes teachers provided according to the revised teacher-to-class ratios under new senior secondary academic structure.)

Total Staff Entitlement	No. of posts in each rank							
	Graduates				Non-graduates			
	Principal	SGM	GM	Total	SAM	AM	CM	Total
7	1	2	3	5	0	0	1	1
8	1	2	4	6	0	0	1	1
9	1	3	4	7	0	0	1	1
10	1	3	5	8	0	0	1	1
11	1	3	5	8	0	1	1	2
12	1	4	5	9	0	1	1	2
13	1	4	6	10	0	1	1	2
14	1	5	6	11	0	1	1	2
15	1	5	7	12	0	1	1	2
16	1	5	8	13	0	1	1	2
17	1	6	8	14	0	1	1	2
18	1	6	8	14	0	1	2	3
19	1	6	9	15	0	1	2	3
20	1	7	9	16	0	1	2	3
21	1	7	10	17	0	1	2	3
22	1	7	11	18	0	1	2	3
23	1	8	11	19	0	1	2	3
24	1	8	12	20	0	1	2	3
25	1	8	12	20	1	1	2	4
26	1	9	12	21	1	1	2	4
27	1	9	13	22	1	1	2	4
28	1	10	13	23	1	1	2	4
29	1	10	14	24	1	1	2	4
30	1	10	15	25	1	1	2	4
31	1	10	15	25	1	1	3	5
32	1	11	15	26	1	1	3	5
33	1	11	16	27	1	1	3	5
34	1	12	16	28	1	1	3	5
35	1	12	17	29	1	1	3	5
36	1	12	18	30	1	1	3	5
37	1	13	18	31	1	1	3	5
38	1	13	18	31	1	2	3	6
39	1	13	19	32	1	2	3	6
40	1	14	19	33	1	2	3	6
41	1	14	20	34	1	2	3	6
42	1	15	20	35	1	2	3	6
43	1	15	21	36	1	2	3	6

<u>Total Staff Entitlement</u>	<u>No. of posts in each rank</u>							
	<u>Graduates</u>				<u>Non-graduates</u>			
	<u>Principal</u>	<u>SGM</u>	<u>GM</u>	<u>Total</u>	<u>SAM</u>	<u>AM</u>	<u>CM</u>	<u>Total</u>
44	1	15	22	37	1	2	3	6
45	1	15	22	37	1	2	4	7
46	1	16	22	38	1	2	4	7
47	1	16	23	39	1	2	4	7
48	1	17	23	40	1	2	4	7
49	1	17	24	41	1	2	4	7
50	1	17	25	42	1	2	4	7
51	1	17	25	42	2	2	4	8
52	1	18	25	43	2	2	4	8
53	1	18	26	44	2	2	4	8
54	1	19	26	45	2	2	4	8
55	1	19	27	46	2	2	4	8
56	1	20	27	47	2	2	4	8
57	1	20	28	48	2	2	4	8
58	1	20	28	48	2	2	5	9
59	1	20	29	49	2	2	5	9
60	1	21	29	50	2	2	5	9
61	1	21	30	51	2	2	5	9
62	1	22	30	52	2	2	5	9
63	1	22	31	53	2	2	5	9
64	1	22	32	54	2	2	5	9
65	1	22	32	54	2	3	5	10
66	1	23	32	55	2	3	5	10
67	1	23	33	56	2	3	5	10
68	1	24	33	57	2	3	5	10
69	1	24	34	58	2	3	5	10
70	1	25	34	59	2	3	5	10
71	1	25	34	59	2	3	6	11
72	1	25	35	60	2	3	6	11
73	1	25	36	61	2	3	6	11
74	1	26	36	62	2	3	6	11
75	1	26	37	63	2	3	6	11
76	1	27	37	64	2	3	6	11
77	1	27	38	65	2	3	6	11
78	1	27	38	65	3	3	6	12
79	1	27	39	66	3	3	6	12
80	1	28	39	67	3	3	6	12
81	1	28	40	68	3	3	6	12
82	1	29	40	69	3	3	6	12
83	1	29	41	70	3	3	6	12
84	1	30	41	71	3	3	6	12
85	1	30	41	71	3	3	7	13
86	1	30	42	72	3	3	7	13

<u>Total Staff Entitlement</u>	<u>No. of posts in each rank</u>							
	<u>Graduates</u>				<u>Non-graduates</u>			
	<u>Principal</u>	<u>SGM</u>	<u>GM</u>	<u>Total</u>	<u>SAM</u>	<u>AM</u>	<u>CM</u>	<u>Total</u>
87	1	30	43	73	3	3	7	13
88	1	31	43	74	3	3	7	13
89	1	31	44	75	3	3	7	13
90	1	32	44	76	3	3	7	13
91	1	32	44	76	3	4	7	14
92	1	32	45	77	3	4	7	14
93	1	32	46	78	3	4	7	14
94	1	33	46	79	3	4	7	14
95	1	33	47	80	3	4	7	14
96	1	34	47	81	3	4	7	14
97	1	34	48	82	3	4	7	14
98	1	34	48	82	3	4	8	15
99	1	35	48	83	3	4	8	15
100	1	35	49	84	3	4	8	15
101	1	35	50	85	3	4	8	15

(updated on 1 September 2009)

Note:

(a) Ranking of Principal

The ranking of Principal of an aided secondary school is determined by the number of classes of the school in accordance with the following scale:

Number of Classes

Ranking of Principal

24 or more

Principal I

15 to 23

Principal II

14 or fewer classes

Principal Graduate Master/Mistress

- (b) Starting from 2009/10 school year, the ratio of graduate teacher posts is 85%. The 85% graduate post entitlement of a school is worked out based on the total number of teaching posts provided under the revised teacher-to-class ratios under the new senior secondary (NSS) academic structure as announced in the report on “The New Academic Structure for Senior Secondary Education and Higher Education”.

(updated on 1 September 2009)

- (c) Two posts in the rank of Principal Graduate Master/Mistress (PGM) are provided in an aided secondary school with 15 or more operating classes to be offset by an equivalent number of Senior Graduate Master/Mistress (SGM) posts.
- (d) The upgrading arrangement for a Senior Assistant Master/Mistress (SAM) post to a Principal Assistant Master/Mistress (PAM) post for a secondary school with 24 or more classes has ceased since 1 September 2008 upon the enhancement of the graduate teacher ratio. With effect from 1 September 2008, serving PAMs with a recognised degree plus teacher training (or equivalent) may apply for re-grading to SGMs to fill up new SGM posts created under the graduate teacher ratio. Upon successful re-grading or natural wastage of a serving PAM, the practice of upgrading an SAM post to a PAM post will cease with immediate effect. The respective proportions of SAM, Assistant Master/Mistress (AM) and Certificated Master/Mistress (CM) posts will not be affected by the cessation of this practice. If a serving PAM teacher does not apply for re-grading to SGM, he/she can continue to

- be accommodated in his/her existing rank of PAM holding against an SGM post created under the graduate teacher ratio accordingly. *(updated on 1 September 2008)*
- (e) One post in the rank of Graduate Master/Mistress (GM) is upgraded to SGM for an aided secondary school with 15 or more operating classes.

## Section 1A/ Attachment B

**Language Improvement Measures**

Major items of the improvement measures, which are designed to discriminate positively in favour of the use of Chinese as the medium of instruction, and at the same time strengthen the teaching of English and Chinese, are as follows: –

1. Additional Teacher of English(a) Secondary 1 to 3

- (i) Additional teachers of English are provided to secondary schools in which full use is made of Chinese as the medium of instruction (MOI) in Secondary 1 to 3 to strengthen the teaching of English. The allocation of additional teachers of English to individual schools will be based on the following scale –

<u>Total no. of Secondary 1 – 3 classes</u>	<u>No. of additional teachers of English</u>
14 or below	1 (1 graduate)
15 – 23	2 (1 non-graduate, 1 graduate)*
24 – 29	3 (1 non-graduate, 2 graduates)
30 – 35	4 (2 non-graduates, 2 graduates)

\* See Attachment B1 for principles of calculation

- (ii) With respect to schools using both English and Chinese as the medium of instruction for different subjects and in different classes, the following rules are applied to determine the number of additional teachers of English to be given –

Let T = Total number of teaching periods in subjects other than language subjects (i.e. English, Chinese, Putonghua, etc.), practical and technical subjects (i.e. Visual Arts [formerly known as Art and Design], Home Economics, Design and Technology, Computer and Information Technology, Physical Education, Music, etc.) and Chinese History in Secondary 1 to 3.

C = Total number of teaching periods in subjects other than language subjects (i.e. English, Chinese, Putonghua, etc.), practical and technical subjects (i.e. Visual Arts [formerly known as Art and Design], Home Economics, Design and Technology, Computer and Information Technology, Physical Education, Music, etc.) and Chinese History in Secondary 1 to 3 in which Chinese is used as the MOI.

- Secondary schools with a total of 3 – 14 Secondary 1 to 3 classes
  - If C is less than 50% of T, no additional teacher of English will be given.

- If C is 50% or more of T, one additional graduate teacher of English will be given.
- Secondary schools with a total of 15 – 23 Secondary 1 to 3 classes
  - If C is less than 25% of T, no additional teacher of English will be given.
  - If C is between 25% and 74% of T, one additional non-graduate teacher of English will be given.
  - If C is 75% or more of T, two additional teachers of English (a graduate and a non-graduate) will be given.
- Secondary schools with a total of 24 – 29 Secondary 1 to 3 classes
  - If C is less than 25% of T, no additional teacher of English will be given.
  - If C is between 25% and 74% of T, two additional teachers of English (a graduate and a non-graduate) will be given.
  - If C is 75% or more of T, three additional teachers of English (2 graduates and a non-graduate) will be given.
- Secondary schools with a total of 30 – 35 Secondary 1 to 3 classes
  - If C is less than 25% of T, no additional teacher of English will be given.
  - If C is between 25% and 74% of T, three additional teachers of English (2 graduates and a non-graduate) will be given.
  - If C is 75% or more of T, four additional teachers of English (2 graduates and 2 non-graduates) will be given.

(b) Secondary 4 to 5

- (i) To strengthen the teaching of English in senior forms, schools under the following categories are provided with an additional graduate teacher of English –

- Schools with a total of four or more Secondary 4 to 5 classes and their C to T ratio is equal to or larger than 0.25; or
- Schools with less than four Secondary 4 and 5 classes and their C to T ratio is equal to or larger than 0.5,

where T = Total number of teaching periods in subjects other than language subjects (i.e. Chinese, English, French, Chinese Literature, English Literature, Putonghua, etc.), practical and technical subjects (i.e. Visual Arts [formerly known as Art and Design], Home Economics, Design and Technology, Computer and Information Technology, Physical Education, Music, etc.) and Chinese History in Secondary 4 and 5.

C = Total number of teaching periods in subjects other than language subjects (i.e. Chinese, English, French, Chinese



Literature, English Literature, Putonghua, etc.), practical and technical subjects (i.e. Visual Arts (formerly known as Art and Design), Home Economics, Design and Technology, Computer and Information Technology, Physical Education, Music, etc.) and Chinese History in Secondary 4 and 5 in which Chinese is used as the MOI.

- (ii) A subject or class will be considered as being taught in Chinese only if all related textbooks, school examinations and tests materials in that subject are also conducted in Chinese.
  - (iii) Principals are reminded that additional teachers of English are provided in order to improve students' language ability. This provision must not be exploited to reduce the number of periods taught by any teacher in any subject.
- (c) Schools may opt for encashment of the additional English teaching posts entitled since the 2006/07 school year to enhance the flexibility in the deployment of resources to strengthen the teaching of English.

*(updated on 1 April 2013)*

## 2. Additional Teaching Spaces

- (a) To enable split-class English Language teaching to be carried out in junior secondary forms, extra accommodation is provided. As the split classes are smaller in size, they can be accommodated in half-sized classrooms. Hence schools eligible for one or more additional teachers of English will be allowed to partition some of their existing classrooms to create the additional rooms required. Individual schools will be informed of the maximum number of classrooms to be partitioned and converted into smaller rooms for split classes in English in accordance with the maximum number of additional teachers of English provided for such classes.
- (b) The partitioning can either be of a fixed or movable type, depending on the preference of schools. Individual eligible schools will be invited to make application to the Permanent Secretary to carry out the work as a major repairs project.

## 3. Additional Teaching Aids

To further support the teaching of English, schools which are eligible for one or more additional teachers of English will be provided with a one-off library grant for the purchase of additional reading materials in English as well as other teaching/learning aids.

Section 1A / Attachment B1**Principles of Calculation of Additional Teachers of English**

A standard-sized secondary school (6664422) in which full use is made of Chinese as the medium of instruction in Secondary 1 to 3 will be provided with two additional teachers of English to enable English classes in at least Secondary 1 – 2 to be split for more effective teaching. The requirement for two additional English teachers is calculated as follows:

- (a) No. of Secondary 1 – 2 classes:  $6 \times 2 = 12$ .
- (b) No. of English periods per class per week (Curriculum Development Committee recommendation): 7
- (c) No. of additional English periods necessary for split classes in Secondary 1 – 2:  $12 \times 7 = 84$ .
- (d) Normal 5-day weekly teaching load per English teacher: 30
- (e) Total no. of additional English teachers required:  $84 \div 30 = 3$  (rounded up).
- (f) No. of additional English teachers already approved in September 1982 for remedial teaching in English: 1
- (g) Therefore no. of additional English teachers to be provided:  $3 - 1 = 2$ .

With a total of three additional teachers of English, a school should be able to split all the English classes in Secondary 1 and 2 for small-group teaching and have six periods of remedial teaching in Secondary 3.

## Section 1A/ Attachment C

**Manning Scale of Laboratory Technicians**

1. The manning scale of Laboratory Technicians is based on the number of practical periods in the whole school in accordance with the number of operating classes and the type of syllabuses adopted and calculated as follows:

$$\text{No. of Laboratory Technicians} = \frac{\text{No. of practical periods per week for the whole school}^*}{54}$$

- \* For schools operating 6-day or 7-day cycles, the number of practical periods per cycle needs to be converted into number per week by multiplying it with 5/X, where X represents the number of days per cycle.
2. The following rules will also apply in the above manning scale:
- any fraction of a post of Laboratory Technician of half or above will be considered as one post;
  - for a developing school where less than two Laboratory Technician posts are justified, any fraction derived will be considered as one post; and
  - the maximum number of Laboratory Technicians should not, in any case, be greater than the number of laboratories in the school.
3. In the calculation of the number of practical periods per week, the following standard numbers of practical periods for different types of syllabuses in each class are to be used:

Level \ Subject	S1	S2	S3	S4	S5	S6 ASL	S6 AL	S7 ASL	S7 AL
Integrated Science/ Science (S1 – 3)	4	4	4	–	–	–	–	–	–
Human Biology	–	–	–	3	3	–	–	–	–
Biology	1	1	2	3	3	3	6	3	6
Chemistry	1	1	2	3	3	3	6	3	6
Physics	1	1	2	3	3	3	6	3	6
Engineering Science	–	–	–	3	3	–	6	–	6
Science and Technology	–	–	–	3	3	–	–	–	–

Where schools are assigning less than the standard numbers of practical periods per week to any class, the actual number should be used in working out the entitlement.

4. (a) One of the Laboratory Technician posts provided will be ranked at Laboratory Technician I in a school where there are four or more laboratories and three or more Laboratory Technicians; and
- (b) One Laboratory Technician I post will be provided at the initial stage for a developing school planned to have four or more laboratories and three or more Laboratory Technicians by the third year of its operation.

5. Where a school is operating Secondary 6 and 7 and has one or more demonstration rooms, one demonstration room only should be counted as a laboratory for staffing purposes.

## Section 1B

**Staff Establishment of Aided Primary Schools****A. Teaching Staff Establishment****1. Staffing Ratio**

- (a) The teaching establishment of an aided bi-sessional or whole-day primary school is calculated respectively on the basis of 1.3 or 1.4 teachers per class. In order to avoid the use of fractions of a teacher, the number of teachers resulting from the application of the 1.3:1 or 1.4:1 formula should be rounded up to the nearest whole number. The only exception to the general rule is that schools operating only one class will be staffed with 1.5 teachers.
- (b) In schools with 6 or more classes, the calculation is exclusive of the post of the Principal of the school.
- (c) Aided primary schools are staffed with teachers at the grades of Certificated Master/Mistress (for non-graduate teachers) and Primary School Master/Mistress (for graduate teachers).
- (d) Each primary school is entitled to have 55% of its teaching staff in the graduate grade in the 2015/16 school year (60% in the 2016/17 school year and 65% from the 2017/18 school year onwards), and should put in place a reasonable grade structure.

*(updated on 1 September 2016)*

**2. Recommended Grade Structure**

The recommended grade structure is as follows:

- (a) The headship and the deputy headship posts should be at the graduate level;
- (b) 55% (in the 2015/16 school year), 60% (in the 2016/17 school year) and 65% (from the 2017/18 school year onwards) of the senior teacher posts should be graduate teacher posts; and
- (c) The remaining graduate posts should be allocated to the basic rank teacher level.

*(updated on 1 September 2016)*

**3. Alternative Grade Structure**

Notwithstanding (2) above, a school has the flexibility to determine an alternative grade structure, and the following should apply:

Grade structure with the number of Primary School Master/Mistress posts exceeding the prescribed percentage of the senior teacher posts:

- (a) The sponsor/Incorporated Management Committee should consult all the teaching staff and obtain their consensus before determining the grade structure.

- (b) The headship and the deputy headship posts should remain at the graduate level.
- (c) Flexibility may be allowed in determining the percentage of graduate posts in the senior teacher rank and the basic rank, subject to the total number of senior teacher posts, graduate teacher posts and the staff entitlement in each school not being exceeded.
- (d) The sponsor/Incorporated Management Committee should forward the proposed grade structure with justifications to the Education Bureau for endorsement. It should also consult all the teaching staff and obtain their consensus before proposing any subsequent changes to the grade structure adopted six months in advance. Prior consent from the Education Bureau should be obtained before implementation.

*(updated on 1 September 2016)*

#### 4. Ranking of Teaching Staff

##### (a) Principal of School

- (i) The ranking of Principal for a bi-sessional/whole-day school is shown in Attachment A/Attachment B respectively.
- (ii) In bi-sessional schools with 25 classes or more where each session is considered as a separate school in the calculation of teaching staff establishment, two headship posts will be provided, one of which will serve as “Principal” as defined in the Education Ordinance if the bi-sessional school is under one school registration.

##### (b) Senior Teacher

The provision of senior teachers is included in the manning scale in Attachment A for primary schools operating bi-sessional classes at the ratio of one senior teacher for every four classes and Attachment B for whole-day primary schools at the ratio of one senior teacher for every three classes. The rank of a senior teacher will be Senior Primary School Master/Mistress (SPSM), Primary School Master/Mistress (PSM) or Assistant Master/Mistress (AM) as appropriate. Senior teachers are required to undertake specific duties in addition to class teaching. The Incorporated Management Committee or Principal of a school may exercise discretion in the allocation of duties to senior teachers as well as the re-distribution of their duties in the light of the school’s entitlement of senior teachers. In a primary school with 12 – 23 classes, one PSM post will be re-ranked to the SPSM rank for the deputy head, and in a primary school with 24 classes or more, two PSM posts will be re-ranked to the SPSM rank for deputy heads. Teachers in the PSM or AM rank may be appointed by promotion or direct appointment to take up the deputy head posts. *(updated on 1 September 2008)*

##### (c) Class Teacher

The rank of class teachers is Assistant Primary School

Master/Mistress (APSM) or Certificated Master/Mistress (CM) as appropriate. The provision of class teachers is included in the manning scale in Attachment A for primary schools operating bi-sessional classes and Attachment B for primary schools operating whole-day classes.

5. Additional Teacher

(a) Student Guidance Teacher

For schools without the student guidance service grant or not being served by Student Guidance Officer, an additional post of the PSM (under sponsor-based entitlement) or AM rank for Student Guidance Teacher (SGT) is provided to a school with 18 or more classes or shared by 2 schools each with 5 – 17 classes under the same sponsoring body. In connection with the enhancement of graduate teacher ratio under 1(d), 2 and 3 above –

- (i) for a sponsoring body entitling to one SGT only for the schools under it, the SGT post is included in the teaching staff entitlement of the base school for working out the graduate post entitlement of that school and the SGT will be considered together with other teachers in the school for re-grading; and
- (ii) for a sponsoring body entitling to two or more SGTs, the following options are given –
  - The SGT post be included in the teaching staff entitlement of each individual base school for working out the graduate post entitlement of the school and the SGT be considered together with other teachers in the school concerned for re-grading; or
  - A graduate post entitlement equivalent to 55% of the SGT posts entitled be provided to the sponsoring body in the 2015/16 school year (60% in the 2016/17 school year and 65% from the 2017/18 school year onwards), and the appointment of SGTs in the PSM grade be considered separately under the same sponsoring body.

For (ii) above, the option, once made, is irrevocable under normal circumstances.

*(updated on 1 September 2016)*

(b) Teacher-librarian

A school meeting one of the following conditions is entitled to the provision of one additional CM post for undertaking the duties of a teacher-librarian –

- (i) each whole-day primary school with three or more ordinary classes
- (ii) each bi-sessional primary school with 12 or more ordinary classes
- (iii) two bi-sessional primary schools housed in the same premises with a total of 12 or more ordinary classes (i.e. the number of a.m. ordinary classes plus the number of p.m. ordinary classes)

This teacher-librarian post is a regular post in addition to the normal

teaching establishment of a school calculated under paragraph 1 (a) and (b) above. The service of a teacher-librarian is counted as teaching experience for promotion purposes in aided primary schools. A school, upon the provision of this additional post, may deploy a teacher at the AM/PSM rank to fill the teacher-librarian post. For appointment as a teacher-librarian, a teacher should have a minimum of two years' teaching experience and preferably the relevant professional qualification in librarianship. Upon appointment a teacher-librarian is required, where appropriate, to complete a part-time day-release training course or other professional training course organised by the Education Bureau.

(c) Additional Senior Teacher Post of English

An additional senior teacher post, to be offset by a post in the rank of CM or APSM as appropriate, is provided to each school that operates six or more classes to provide curriculum leadership in the teaching of English to improve co-ordination, planning and methodology. In an aided bi-sessional primary school with a total of 25 classes or more for both sessions, each session is considered as a separate school. The conditions for promotion/appointment to the additional post are at Section 5.

(d) Additional Posts for Specialised Teaching

The provision of additional CM posts calculated on the basis of 0.1 teacher per class is provided for the implementation of specialised teaching in English Language, Chinese Language and Mathematics in primary schools. Upon full implementation from 2007/08 school year, the teacher-to-class ratio is enhanced from 1.4 to 1.5 teachers per class for whole-day primary schools, and from 1.3 to 1.4 teachers per class for bi-sessional schools. *(updated on 1 September 2008)*

(e) Primary School Curriculum Leader

With effect from the 2007/08 school year, an additional post for Primary School Curriculum Leader at the PSM rank is provided to a primary school with 12 or more approved classes, and for a primary school with 6 to 11 approved classes, the post is at the APSM rank. *(updated on 1 September 2008)*

## **B. Non-teaching Staff Entitlement**

### Educational Psychologists

- (a) The Education Bureau creates additional educational psychologist (EP) posts in aided ordinary schools and invites school sponsoring bodies (SSBs) to apply for these posts under the School-based Educational Psychology Service (SBEPS) starting from the 2008/09 school year. Each EP post awarded to the SSB is employed as a non-teaching specialist staff of a base school under its sponsorship to provide SBEPS for schools assigned by the Education Bureau and such schools are not limited to



those belonging to the same SSB operating the base school.

- (b) The EP posts created in aided ordinary schools are combined establishment, with the ranks of EP I and II. Candidates having fully met the entry requirements for EP I, with at least 3 years of satisfactory service as an EP II, can be considered for direct appointment to EP I. Candidates not fully meeting the above criteria may be appointed as EP II, should they meet the entry requirements for this rank. Guides to appointment of EP I and II are stipulated in Sections 4.24 and 4.25 respectively and conditions for promotion of EP are stipulated in Section 4.25.

*(Updated on 24 May 2013)*

The following scales should apply in determining the clerical and janitor staff entitlements of a school for the purpose of calculating the amount of Administration Grant or the Revised Administration Grant as appropriate payable to it<sup>5</sup>:

1. Clerical staff

(a) Bi-sessional schools

<u>No. of classes</u>	<u>Rank and no. of clerical staff entitled</u>
1 – 3	Nil
4 – 11	1 Clerical Assistant
12 – 23	1 Assistant Clerical Officer
24 or more	1 Assistant Clerical Officer + 1 Clerical Assistant

In bi-sessional schools with 25 classes or more, each session will be considered as a separate school in the calculation of the clerical staff establishment.

(b) Whole-day schools

<u>No. of classes</u>	<u>Rank and no. of clerical staff entitled</u>
1 – 3	Nil
4 – 11	1 Clerical Assistant
12 – 23	1 Assistant Clerical Officer + 1 Clerical Assistant
24 or more	1 Assistant Clerical Officer + 2 Clerical Assistants

2. Janitor staff

One janitor staff may be allowed for every four or fraction of four classes and special purpose rooms in use for the AM or whole-day session and one janitor staff may be allowed for every eight or fraction of eight classes and special purpose rooms in use for the PM session. If the total includes a fraction of 0.5 or above, it will be rounded up to next whole number.

<sup>5</sup> Schools that opt for the Administration Grant will pay the salaries of their clerical and janitor staff through the Administration Grant, and those that opt for the Revised Administration Grant will pay the salaries of their janitor staff through the Revised Administration Grant and the actual salaries of the clerical staff through the Salaries Grant.

## Section 1B/ Attachment A

**Teaching Staff Establishment in Aided Primary Schools  
Operating Bi-sessional Classes  
under the 1.3:1 teacher-to-class ratio and a ratio of  
one Senior Teacher for every four classes**

No. of Classes *	Rank of Principal	No. of Deputy Head (SPSM) @	No. of Senior Teachers # (excluding Deputy Head, if entitled)	No. of Class Teachers #	Total No. of Staff (including Principal)
1	SPSM	–	0	0.5	1.5
2	SPSM	–	0	2	3
3	SPSM	–	0	3	4
4	SPSM	–	1	4	6
5	SPSM	–	1	5	7
6	SPSM	–	1	7	9
7	SPSM	–	1	9	11
8	SPSM	–	2	9	12
9	SPSM	–	2	10	13
10	SPSM	–	2	11	14
11	SPSM	–	2	13	16
12	HMII	1	2	13	17
13	HMII	1	2	14	18
14	HMII	1	2	16	20
15	HMII	1	2	17	21
16	HMII	1	3	17	22
17	HMII	1	3	19	24
18	HMII	1	3	20	25
19	HMII	1	3	21	26
20	HMII	1	4	21	27
21	HMII	1	4	23	29
22	HMII	1	4	24	30
23	HMII	1	4	25	31
24	HMI	2	4	26	33
25	HMI	2	4	27	34
26	HMI	2	4	28	35
27	HMI	2	4	30	37
28	HMI	2	5	30	38
29	HMI	2	5	31	39
30	HMI	2	5	32	40
31	HMI	2	5	34	42
32	HMI	2	6	34	43
33	HMI	2	6	35	44
34	HMI	2	6	37	46
35	HMI	2	6	38	47
36	HMI	2	7	38	48

(updated on 1 September 2008)

- \* In a bi-sessional school with 25 classes or more, where each session is considered as a separate school in the calculation of teaching staff establishment, two headship posts will be provided, one of which will serve as “Principal” as defined in the Education Ordinance if the bi-sessional school is under one school registration.
- @ In an ordinary primary school with 12 – 23 classes, one PSM post will be re-ranked to the SPSM rank for deputy head, and in an ordinary primary school with 24 classes or more, two PSM posts will be re-ranked to the SPSM rank for deputy heads.
- # The respective numbers of senior teachers (excluding the deputy head) and class teachers by rank (i.e. by PSM, AM, APSM and CM) entitled by a school should be determined in accordance with the grade structure it has adopted or as endorsed by the Education Bureau as appropriate, subject to the total number of graduate teacher posts entitled by the school not being exceeded.

*(updated on 1 September 2008)*

## Section 1B/ Attachment B

**Teaching Staff Establishment in Whole-day Aided Primary Schools  
under the 1.4:1 teacher-to-class ratio  
and a ratio of one Senior Teacher for every three classes**

No. of Classes	Rank of Principal	No. of Deputy Head (SPSM) @	No. of Senior Teachers # (excluding Deputy Head, if entitled)	No. of Class Teachers #	Total No. of Staff (including Principal)
1	SPSM	–	0	0.5	1.5
2	SPSM	–	0	2	3
3	SPSM	–	1	3	5
4	SPSM	–	1	4	6
5	SPSM	–	1	5	7
6	SPSM	–	2	7	10
7	SPSM	–	2	8	11
8	SPSM	–	2	10	13
9	SPSM	–	3	10	14
10	SPSM	–	3	11	15
11	SPSM	–	3	13	17
12	HMII	1	3	13	18
13	HMII	1	3	15	20
14	HMII	1	3	16	21
15	HMII	1	4	16	22
16	HMII	1	4	18	24
17	HMII	1	4	19	25
18	HMII	1	5	20	27
19	HMII	1	5	21	28
20	HMII	1	5	22	29
21	HMII	1	6	23	31
22	HMII	1	6	24	32
23	HMII	1	6	26	34
24	HMI	2	6	26	35
25	HMI	2	6	27	36
26	HMI	2	6	29	38
27	HMI	2	7	29	39
28	HMI	2	7	31	41
29	HMI	2	7	32	42
30	HMI	2	8	32	43
31	HMI	2	8	34	45
32	HMI	2	8	35	46
33	HMI	2	9	36	48
34	HMI	2	9	37	49
35	HMI	2	9	38	50
36	HMI	2	10	39	52

(updated on 1 September 2008)

- @ In an ordinary primary school with 12 – 23 classes , one PSM post will be re-ranked to the SPSM rank for deputy head and in an ordinary primary school with 24 classes or more, two PSM posts will be re-ranked to the SPSM rank for deputy heads.
- # The respective numbers of senior teachers (excluding the deputy head) and class teachers by rank (i.e. by PSM, AM, APSM and CM) entitled by a school should be determined in accordance with the grade structure it has adopted or as endorsed by the Education Bureau as appropriate, subject to the total number of graduate teacher posts entitled by the school not being exceeded.

*(updated on 1 September 2008)*

## Section 1C

**Staff Establishment of Aided Special Schools****SCHOOL SECTION****A. Teaching Staff Establishment****1. Staffing Ratio**

Upon the implementation of the New Senior Secondary academic structure from the 2009/10 school year, the staffing ratios for primary classes and junior secondary classes are 1.7 teachers per class, and the staffing ratio for senior secondary classes is 1.9 teachers per class. These staffing ratios have embedded the Additional Teachers for All Special Schools<sup>6</sup>. Starting from the 2012/13 school year, the staffing ratio for senior secondary classes of special schools offering the ordinary curriculum will be 2.0 teachers per class. The number of teachers will be calculated separately for the primary and secondary sections. Any decimal teacher entitlement arising from the calculation of the foregoing staffing ratios will be provided as Graduate Master/Mistress (GM) and Assistant Primary School Master/Mistress (APSM) in the secondary and primary sections respectively. Schools may keep the fractional teacher posts, which will not be counted towards the calculation of promotion posts or graduate teacher ratio, in the teaching staff establishment. Alternatively, schools may opt for encashing the fractional teacher posts calculated at the mid-point salary of GM and APSM respectively.

*(updated on 1 September 2009)*

**2. Ranking of Teaching Staff****(a) Principal of School**

In schools with more than 3 classes, the calculation is exclusive of the post of the Principal of the school. The ranking of Principal is shown in Attachment A.

**(b) Senior Teacher**

Senior teachers for the primary section are included in the teaching establishment. The rank of a senior teacher should be Senior Primary School Master/Mistress (SPSM), Primary School Master/Mistress (PSM) or Assistant Master/Mistress (AM). Senior teachers are required to undertake specific duties in addition to class teaching. In a primary special school or special school with primary section with 12 – 23 equivalent ordinary primary classes, one PSM post will be re-ranked to the SPSM rank for the deputy head, and in a primary special school or special school with primary section with 24 equivalent ordinary primary classes or more, two PSM posts will be

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<sup>6</sup> Additional Teachers for All Special Schools include Resource Teacher for Supportive Educational Programmes, Teacher Librarian and teacher for spilt-class teaching.

re-ranked to the SPSM rank for deputy heads. For special schools with both primary and secondary sections, they are allowed to opt for the provision of deputy heads either at the secondary level or the primary level, but not both. The option once made is irrevocable. All teachers in the PSM or AM rank may be appointed by promotion or direct appointment to take up the deputy head posts. *(updated on 1 September 2008)*

(c) Teacher Assisting in Speech Therapy (TAST)

Special schools for children with hearing impairment may appoint TASTs at the ratio of 1 for 3 classes of which one post must be offset by a speech therapist.

The number of TASTs is calculated for the school as a whole. Where fractional staff results, this will be rounded up when it reaches 0.5, otherwise it will be rounded down. The resulting number will then be apportioned between the primary and secondary sections of the school in accordance with the number of classes in each section, in such a way that no fractional staff for either section will result. TASTs form part of the non-graduate teaching establishment of the school.

(d) Mobility Instructor

A special school for the children with visual impairment or special school for children with visual impairment cum intellectual disability may appoint 0.5 mobility instructor per class. Mobility instructors will be apportioned between the primary and secondary sections of the schools in accordance with the number of classes in each section and be included in the calculation of the teaching staff establishment for the relevant section before the rounding up or down of fractional staff. Mobility instructors are reckoned as members of the non-graduate teaching establishment of the school. *(updated on 2 February 2015)*

(e) Resource Teacher

(i) Resource Teacher for Children with Visual Impairment

A special school for the visually impaired may appoint resource teachers to teach children with visual impairment (those with total blindness, severe low vision or moderate low vision) who register with the school for the visually impaired for resource support and attend ordinary schools and special schools other than those for the visually impaired, at the ratio of 0.5 teacher for 1 – 4 students. Such teachers for secondary students of ordinary schools will be reckoned as members of the graduate teaching establishment of the secondary section while those for students of primary classes of ordinary schools and special schools will be reckoned as members of the non-graduate teaching establishment of the primary section. In calculating the number of resource teachers for children with visual impairment at Graduate

Master/Mistress (GM) and Certificated Master/Mistress (CM) ranks, when dividing both numbers of target students by 4 leaves 2 remainders and the sum of the remainders does not exceed 4, the remainders should be added together for the calculation of resource teacher establishment at the GM rank.

(ii) Resource Teacher for Autistic Children

A special school for children with mild and/or moderate intellectual disability may appoint 1 additional non-graduate resource teacher in its primary section for children with autistic disorder, taking into account their needs for varying degree of remedial support at the following provision ratio:

<u>No. of children with autistic disorder</u>	<u>No. of teachers provided</u>
Every 8 requiring intensive remedial teaching programme	1
Every 16 requiring less intensive remedial teaching programme	1

The additional teaching post is approved on the understanding that the operation of remedial teaching programme for autistic children is justified by the actual enrolment of such students in the school. The post will be clawed back when it is no longer justified.

(iii) Resource Teacher for Supportive Remedial Service

- A special school for children with hearing impairment may appoint 1 additional non-graduate resource teacher in its primary section to provide remedial teaching support to students with hearing impairment who are attending ordinary primary schools and are identified to be backward academically, at the ratio of 1 teacher for 1 unit. The size of a unit is 1 – 20 students.
- A special school for children with hearing impairment may appoint 1 additional resource teacher at the GM grade in its secondary section to provide remedial teaching support to students with hearing impairment who are at junior secondary level in ordinary schools, at the ratio of 1 teacher for 1 unit. The size of a unit is 1 – 10 students.

(f) Teacher for Senior Secondary Support Programme

Hospital School may appoint 1.5 teachers at GM rank for a Senior Secondary Support Programme. The additional teacher posts will not be counted towards the calculation of promotion posts or graduate teacher ratio. The School may keep the fractional teacher post in the teaching establishment or opt for a cash provision calculated on the basis of the mid-point salary of GM.

*(updated on 1 September 2009)*



(g) Low-vision Training Teacher

A special school for children with visual impairment or special school for children with visual impairment cum intellectual disability may, subject to the needs identified, appoint not more than 1 additional non-graduate teacher in its primary section for delivering low-vision training programme. The school is entitled to 0.5 or 1 additional non-graduate teacher if the workload of the low-vision training service is below or over 50% of the workload of a full-time teacher respectively. *(updated on 2 February 2015)*

(h) Additional Senior Teacher Post of English

An additional senior teacher post, to be offset by a post in the rank of CM or Assistant Primary School Master/Mistress (APSM) as appropriate, is provided to each primary special school/special school with primary section that operates six or more primary classes and adopts the ordinary school curriculum to provide curriculum leadership in the teaching of English to improve co-ordination, planning and methodology. The conditions for appointment to the additional post are at Section 5.

(i) Primary School Curriculum Leader

With effect from the 2007/08 school year, an additional Primary School Curriculum Leader post at the PSM rank is provided to a special school with 12 or more approved primary classes; and for a special school with 6 to 11 approved primary classes, the post is at the APSM rank. *(updated on 1 September 2008)*

(j) Expansion of Graduate Post in Special Schools with a Secondary Section

For higher teaching standards, a special school with a secondary section may upgrade a maximum of four non-graduate teaching posts to graduate teaching posts. With effect from 1 September 2008, this provision of graduate posts upgraded from non-graduate posts is subsumed under the enhanced graduate teacher ratio. *(updated on 1 September 2008)*

(k) Graded Post within the Establishment

The number of posts in each grade is determined by making reference to the following attachments:

Attachment B Teaching Staff Establishment for Primary Classes in Special Schools

Attachment C Teaching Staff Establishment for Secondary Classes in Special Schools *(updated on 1 September 2008)*

(l) Flexibility in Teaching Staff Structure

In view of the varying needs of different categories of special schools, Principals and the Incorporated Management Committee may propose, for the approval of the Permanent Secretary, teaching staff structures for the secondary sections of their schools with a higher proportion of non-graduate posts than in the standard manning scales, subject to the following conditions:

- (i) No serving teacher's service may be terminated for the purpose of taking advantage of this provision; and
  - (ii) When a teaching staff structure of a school has been approved and implemented which involves additional AM or Senior Assistant Master/Mistress (SAM) posts, it will only be possible to raise the proportion of graduate posts when AM and SAM posts fall vacant. It will not then be possible to replace a departing CM with a GM.
- (m) Workshop Teacher
- (i) In special schools with workshops in the secondary section, one Certificated Master/Mistress (Workshop Teacher) may be appointed per approved workshop.
  - (ii) In special schools with workshops in the secondary section, one Assistant Master/Mistress (Workshop Teacher) may be appointed for every 4 approved workshops.

## **B. Non-teaching Staff Establishment**

### 1. Laboratory Technician

- (a) Laboratory Technicians II/III for science laboratories may be appointed on the following scale:

<u>Number of Laboratories</u>	<u>Number of Laboratory Technicians</u>
1	1
2	2
3	3

- (b) In special schools for children with hearing impairment with up to 17 classes, an additional Laboratory Technician II/III may be appointed for the maintenance of audiological equipment and hearing aids. A second additional laboratory technician may be appointed in schools for children with hearing impairment with 18 classes or more.
- (c) In special schools with five or more laboratories in the secondary section, one of the laboratory technicians may be appointed at the Laboratory Technician I level.
- (d) In a special school for children with hearing impairment with more than 17 classes, one of the laboratory technicians appointed for the maintenance of audiological equipment and hearing aids may be appointed at the Laboratory Technician I level.

- (e) In a special school for children with visual impairment (special school for children with visual impairment cum intellectual disability excluded), a Laboratory Technician II/III may be appointed for the maintenance of special equipment/technical aids, and for providing technical assistance in setting up and operating the equipment.

*(updated on 2 February 2015)*

## 2. Special School Social Worker

- (a) Special schools may appoint 0.5 special school social worker for every 35 students. However, where a sponsor operates two or more special schools, the ratio of provision may be applied to the combined capacity of the schools as if they were a single school.
- (b) Special school social workers should, in general, be ranked at the Senior Social Work Assistant level.
- (c) Social workers in the following categories of special schools should be ranked at the Assistant Social Work Officer level, if graduate social workers are employed; or at the Senior Social Work Assistant level if the posts are filled by non-graduate social workers;
- (i) schools for social development;
  - (ii) schools with senior secondary classes; or
  - (iii) schools where there are three or more professional disciplines (e.g. speech therapists, physiotherapists, occupational therapists and nurses) in addition to teachers and social workers, and where the social workers are given the additional responsibilities of a rehabilitation coordinator.

## 3. Speech Therapist (ST)

Special schools for the hearing impaired, for the visually impaired with intellectual disability, for the physically disabled, and for the intellectually disabled may appoint STs on the following scale:

Type of School	No. of Classes	No. of ST
(i) Visual impairment with intellectual disability, Physical disability, Mild intellectual disability, Moderate intellectual disability, and Combined mild and moderate intellectual disability	1 – 5	1
	6 – 10	2
	11 – 15	3
	16 – 20	4
	21 – 25	5
	26 – 30	6
(ii) Severe intellectual disability	1 – 5	1
	6 – 10	2
	11 – 15	2.5
	16 – 20	3
(iii) Hearing impairment	1 ST by offsetting 1 of the TAST posts	

*(updated on 1 September 2009)*

4. Physiotherapist and Artisan

- (a) Special schools for children with physical disability and special schools for children with severe intellectual disability may appoint 0.5 physiotherapist for every 15 students and one artisan to support every two physiotherapists. *(updated on 2 February 2015)*
- (b) The Staff Structure for Physiotherapist (PT) should be as follows:

No. of PTs entitled	Ranking of staff		
	SPT	PT I	PT II
1	–	1	–
1.5	–	1	0.5
2	–	1	1
2.5	–	1	1.5
3	–	1	2
3.5	–	1	2.5
4	–	2	2
4.5	–	2	2.5
5	–	2	3
5.5	–	2	3.5
6	1	2	3
6.5	1	2	3.5
7	1	2	4
7.5	1	2	4.5
8	1	3	4
8.5	1	3	4.5
9	1	3	5
9.5	1	3	5.5
10	1	4	5

*(updated on 1 September 2009)*

5. Occupational Therapist and Occupational Therapy Assistant

- (a) Special schools for children with physical disability and special schools for children with severe intellectual disability may appoint 0.5 occupational therapist and 0.5 occupational therapy assistant for every 15 students. *(updated on 2 February 2015)*
- (b) The Staff Structure for Occupational Therapist (OT) should be as follows:

No. of OTs entitled	Ranking of staff		
	SOT	OT I	OT II
1	–	1	–
1.5	–	1	0.5
2	–	1	1
2.5	–	1	1.5

No. of OTs entitled	Ranking of staff		
	SOT	OT I	OT II
3	–	1	2
3.5	–	1	2.5
4	–	2	2
4.5	–	2	2.5
5	–	2	3
5.5	–	2	3.5
6	1	2	3
6.5	1	2	3.5
7	1	2	4
7.5	1	2	4.5
8	1	3	4
8.5	1	3	4.5
9	1	3	5
9.5	1	3	5.5
10	1	4	5

(updated on 1 September 2009)

#### 6. Educational Psychologist

- (a) Sponsoring bodies operating a minimum of 30 special school classes (except hospital schools) may appoint school-based educational psychologists. While each educational psychologist may serve more than one special school under a particular sponsor, he will be employed by and stationed at one of the schools and considered as a member of the non-teaching specialist staff of that school. Provision ratios for educational psychologists to be employed by special schools are as follows:

<u>No. of Classes</u> <u>Operated by the Same Sponsor</u>	<u>Provisions of Psychologist(s)</u>
30 – 59	1
60 – 99	2
100 – 139	3
140 – 179	4

- (b) The Educational Psychologist (EP) posts created in aided special schools are combined establishment, with the ranks of EP I and II. Candidates having fully met the entry requirements for EP I, with at least 3 years of satisfactory service as an EP II, can be considered for direct appointment to EP I. Candidates not fully meeting the above criteria may be appointed as EP II, should they meet the entry requirements for this rank. Guides to appointment of EP I and II are stipulated in Sections 4.24 and 4.25 respectively and conditions for promotion of EP are stipulated in Section 4.25.

(Updated on 24 May 2013)

7. School Nurse

Special schools for children with physical disability, special schools for children with intellectual disability and special schools for children with visual impairment cum intellectual disability may appoint full-time registered nurses on the following scale:

Type of School	No. of Students	No. of School Nurses
Physical disability or Severe intellectual disability	40 – 129	1
	130 or more	2
Mild intellectual disability, Moderate intellectual disability, Combined mild and moderate intellectual disability, or Visual impairment cum intellectual disability	40 or more	1

(updated on 2 February 2015)

8. Clerical Staff

Special schools may appoint clerical staff on the following scale for the calculation of the amount of Administration Grant or the Revised Administration Grant as appropriate payable to it<sup>7</sup>:

<u>Student Capacity at Full Development</u>	<u>No. of Clerical Staff</u>
up to 49	1 Clerical Assistant
50 – 99	1 Assistant Clerical Officer
100 – 149	1 Assistant Clerical Officer and 1 Clerical Assistant
150 or more	2 Assistant Clerical Officers

9. Braille Staff

Special schools for the visually impaired operating resource support programme for students with visual impairment may appoint braille staff at the following scale:

<u>No. of Students with Visual Impairment Registered under the Resource Support Programme</u>	<u>Provision of Braille Staff</u>
8	0.5
16	1

10. Workshop Attendant

Special schools may appoint one workshop attendant for each approved workshop.

11. Janitor Staff

Special schools may appoint janitor staff on the following scale for the calculation of the amount of Administration Grant or the Revised

Administration Grant as appropriate payable to it<sup>7</sup>.

One-third janitor staff may be allowed for every operating class and approved special room. In schools for children with physical disability and schools for children with severe intellectual disability, 0.75 janitor staff may be allowed for every operating class and 0.5 for every approved special room. Fractional staff will be rounded up after summation. *(updated on 2 February 2015)*

## 12. Motor Driver

- (a) Special schools for children with visual impairment, special schools for children with physical disability, special schools for children with moderate intellectual disability, special schools for children with severe intellectual disability, special schools for children with hearing impairment and schools for social development may appoint motor drivers for registered special school buses. *(updated on 2 February 2015)*
- (b) Drivers who are required to drive a registered school bus with 30 or more seats will be appointed as Special Drivers. Those who are assigned to drive registered school buses with fewer than 30 seats will be appointed as Motor Drivers.

## 13. Teacher Assistant

Teacher Assistants may be appointed in the following categories of special schools at the ratio of 1 teacher assistant per class:

- (a) schools for children with severe intellectual disability;
- (b) schools for children with visual impairment cum intellectual disability;
- (c) schools for children with physical disability; and
- (d) psychiatric units in hospital schools.

Teacher Assistants may be appointed in the following categories of special schools at the ratio of 1 teacher assistant per 2 resource teachers for autistic children:

- (a) schools for children with mild intellectual disability;
- (b) schools for children with moderate intellectual disability; and
- (c) schools for children with mild and moderate intellectual disability.

*(updated on 2 February 2015)*

## **BOARDING SECTION**

All special schools with an approved boarding section subvented by the Education Bureau is provided with the following staff:

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<sup>7</sup> Schools that opt for the Administration Grant for their school section will pay the salaries of their clerical and janitor staff through the Administration Grant, and those that opt for the Revised Administration Grant will pay the salaries of their janitor staff through the Revised Administration Grant and the actual salaries of the other staff through the Salaries Grant.

1. Warden

- (a) One warden may be appointed for the boarding section.
- (b) The warden should, in general, be ranked at the Assistant Social Work Officer level.
- (c) As an alternative rank for the warden grade, the post can be filled by non-graduate social workers at the Chief Social Work Assistant level for a boarding section with a capacity of 50 boarders and above, or the Senior Social Work Assistant level for a boarding section with a capacity of less than 50 boarders.

2. Assistant Warden

An assistant warden may be appointed among the approved establishment of houseparents and programme workers. The assistant warden should be ranked at the Senior Social Work Assistant level for a boarding section with a capacity of 50 boarders and above, and at the Social Work Assistant level for a boarding section with a capacity of less than 50 boarders.

3. Houseparent-in-charge

For a boarding section with a capacity of 50 boarders and above, a houseparent-in-charge may be appointed amongst every 4 posts of houseparent. The houseparent-in-charge should be ranked at the Social Work Assistant level.

4. Houseparent \*

Houseparents at Social Work Assistant level may be appointed on the following scale:

<u>Categories of boarders</u>	<u>Week-day ratio</u>	<u>Week-end &amp; Sunday ratio</u> (in addition to the week-day provision)
Hearing impairment or Visual impairment	2 for 15 boarders	1.4 for 15 boarders
Moderate intellectual disability	2 for 12 boarders	1.4 for 12 boarders
Physical disability, Severe intellectual disability, or Visual impairment cum intellectual disability	2 for 8 boarders	1.4 for 8 boarders

(updated on 2 February 2015)

5. Programme Worker \*

Programme workers at Social Work Assistant level may be appointed on the following scale:

<u>Number of boarders</u>	<u>For week-days</u>	<u>For week-ends &amp; Sundays</u> (in addition to the week-day provision)
60 or less	1	0.7
61 – 120	2	1.4
121 or more	3	2.1



*(updated on 2 February 2015)*

## 6. Nurse

Nurses may be appointed on the following scale:

<u>Categories of boarders</u>	<u>Week-day ratio</u>	<u>Week-end &amp; Sunday ratio</u> (in addition to the week-day provision)
Hearing impairment, Visual impairment or Moderate intellectual disability	1 Registered Nurse for 20 or more boarders	0.7 Registered Nurse for 20 or more boarders
Physical disability, Severe intellectual disability, or Visual impairment cum intellectual disability	1 Registered Nurse or Enrolled Nurse for 25 boarders	0.7 Registered Nurse or Enrolled Nurse for 25 boarders

*(updated on 2 February 2015)*

Where fractional staff results, this will be rounded up to the next whole number.

For boarding sections of special schools for children with moderate intellectual disability, special schools for children with severe intellectual disability, special schools for children with physical disability or special schools for children with visual impairment cum intellectual disability, the minimum provision will be one nurse at any one time during the operational hours of the boarding section irrespective of its size. *(updated on 2 February 2015)*

## 7. Clerical Staff

One clerical assistant may be appointed for each boarding section for the calculation of the amount of Administration Grant or the Revised Administration Grant as appropriate payable to it<sup>8</sup>.

## 8. Cook

Cooks may be appointed on the following scale:

<u>Number of boarders</u>	<u>For week-days</u>	<u>For Week-ends &amp; Sundays</u> (in addition to the week-day provision)
39 or less	2	1.4
40 – 79	3	2.1
80 or more	4	2.8

*(updated on 2 February 2015)*

## 9. Watchman

Two watchmen may be appointed for each boarding section.

<sup>8</sup> Schools that opt for the Administration Grant for their boarding section will pay the salaries of their clerical and janitor staff through the Administration Grant, and those that opt for the Revised Administration Grant will pay the salaries of their janitor staff through the Revised Administration Grant and the actual salaries of the other staff through the Salaries Grant.

10. Janitor Staff \*

Janitor staff may be allowed on the following scale for the calculation of the amount of Administration Grant or the Revised Administration Grant as appropriate payable to the school's boarding section<sup>9</sup>:

<u>Categories of boarders</u>	<u>Week-day ratio</u>	<u>Week-end &amp; Sunday ratio</u> (in addition to the week-day provision)
Hearing impairment	One for 20 or fewer boarders	0.7 for 20 or fewer boarders
Visual impairment or Moderate intellectual disability	One for 15 or fewer boarders	0.7 for 15 or fewer boarders
Physical disability, Severe intellectual disability, or Visual impairment cum intellectual disability	One for 10 or fewer boarders	0.7 for 10 or fewer boarders

*(updated on 2 February 2015)*

- \* In calculating the number of staff for houseparents, programme workers and janitor staff, individual fractions of these three grades will be added together and the fraction resulting, if any, will be rounded up to the next whole number. Posts created after summation and rounding up of the fraction may be appointed as houseparent/ programme worker/ janitor staff at the discretion of the school to meet operational needs.

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<sup>9</sup> Schools that opt for the Administration Grant for their boarding section will pay the salaries of their clerical and janitor staff through the Administration Grant, and those that opt for the Revised Administration Grant will pay the salaries of their janitor staff through the Revised Administration Grant and the actual salaries of the other staff through the Salaries Grant.

## Section 1C/ Attachment A

**Ranking of Principal of Special Schools****A. Special Schools with Combined Levels or Secondary Classes Only**

1. The ranking of Principals of aided special schools with combined levels or secondary classes only is determined on the basis of the number of equivalent full-streamed ordinary secondary classes worked out according to the following weighting system and relativity ratio:

**(a) Weighting system**

1 special primary class = 0.6 full-streamed special secondary class

1 special junior secondary class = 0.8 full-streamed special secondary class

1 special senior secondary class = 1 full-streamed special secondary class

**(b) Relativity of ranking of Principal between special schools and ordinary schools:**

A school with 18 equivalent full-streamed special secondary classes = a school with 24 ordinary secondary classes

2. The converted number of equivalent ordinary secondary classes, with fractional numbers rounded down, will determine the ranking of Principal for a special school in accordance with the following scale:

Number of equivalent full-streamed ordinary secondary classes	Ranking of Principal
24 or more	Principal II (Pr II)** Principal I (Pr I)
15 – 23	Principal II (Pr II)
14 or less	Principal Graduate Master/Mistress (PGM)

Where fractional class results, this will be rounded down.

\*\* Principal I (Pr I) post will only be provided for special schools operating senior secondary class(es) with 24 or more equivalent full-streamed ordinary secondary classes.

**B. Primary Special Schools**

1. The ranking of Principals of aided primary special schools is determined by the number of equivalent ordinary primary classes worked out according to the following relativity ratio:

A school with 18 special primary classes = a school with 24 ordinary primary classes

2. The converted number of equivalent ordinary primary classes, with fractional numbers rounded down, will determine the ranking of Principal for a special school in accordance with the following scale:

<u>Number of equivalent ordinary primary classes</u>	<u>Ranking of Principal</u>
24 or more	Headmaster/Headmistress I (HM I)
12 – 23	Headmaster/Headmistress II (HM II)
11 or less*	Senior Primary School Master/Mistress (SPSM)

*(updated on 1 September 2008)*

- \* The teaching staff establishment is inclusive of the Principal of a school (Senior Primary School Master/Mistress level) with four equivalent ordinary primary classes. *(updated on 1 September 2008)*

## Section 1C/ Attachment B

**Teaching Staff Establishment for Primary Classes in Special Schools**

Total Staff Entitlement (Excluding Principal)	# Number of Posts in Each Rank	
	* AM	CM
1	–	1
2	–	2
3	1	2
4	1	3
5	1	4
6	1	5
7	2	5
8	2	6
9	2	7
10	2	8
11	3	8
12	3	9
13	3	10
14	3	11
15	4	11
16	4	12
17	4	13
18	4	14
19	5	14
20	5	15
21	5	16
22	5	17
23	6	17
24	6	18
25	6	19
26	6	20
27	7	20
28	7	21
29	7	22
30	7	23
31	8	23
32	8	24
33	8	25
34	8	26
35	9	26
36	9	27
37	9	28
38	9	29
39	10	29
40	10	30
41	10	31
42	10	32
43	11	32
44	11	33
45	11	34
46	11	35
47	12	35
48	12	36

Note:

- # The respective numbers of senior teachers and teachers by rank (i.e. SPSM, PSM, AM, APSM and CM) entitled by a school should be determined in accordance with the grade structure it has adopted or as endorsed by the Education Bureau as appropriate, subject to the total number of graduate teacher posts entitled by the school not being exceeded.
- \* In a primary special school or special school with primary section with 12 – 23 equivalent ordinary primary classes, one PSM post will be re-ranked to the SPSM rank for the deputy head, and in a primary special school or special school with primary section with 24 equivalent ordinary primary classes or more, two PSM posts will be re-ranked to the SPSM rank for deputy heads. For special schools with both primary and secondary sections, they are allowed to opt for the provision of deputy heads either at the secondary level at PGM rank (see Section 1C/Attachment C) or at the primary level at SPSM rank, but not both. The option once made is irrevocable.

*(updated on 1 September 2008)*

1. The recommended grade structure is as follows:
  - (a) The headship and deputy headship posts should be at the graduate level;
  - (b) 50% (from the 2009/10 school year onwards) of the senior teacher posts should be graduate teacher posts; and  
*(updated on 1 September 2009)*
  - (c) The remaining graduate posts should be allocated to the basic rank teacher level.
2. Notwithstanding (1) above, a school has the flexibility to determine an alternative grade structure, and the following should apply:

Grade structure with the number of PSM posts exceeding 50% of the senior teacher posts:

- (a) The sponsor/Incorporated Management Committee should consult all the teaching staff and obtain their consensus before determining the grade structure.
- (b) The headship and the deputy headship posts should remain at the graduate level.
- (c) Flexibility may be allowed in determining the percentage of graduate posts in the senior teacher rank and the basic rank, subject to the total number of senior teacher posts, graduate teacher posts and the staff entitlement in each school not being exceeded.
- (d) The sponsor/Incorporated Management Committee should forward the proposed grade structure with justifications to the Education Bureau for endorsement. It should also consult all the teaching staff and obtain their consensus before proposing any subsequent changes to the grade structure adopted six months in advance. Prior consent from the Education Bureau should be obtained before implementation.

*(updated on 1 September 2009)*

## Section 1C/ Attachment C

*(updated on 1 September 2008)***Teaching Staff Establishment for Secondary Classes in Special Schools**

(The number of posts in the table below includes teachers provided according to the revised teacher-to-class ratios as specified in Section 1C Paragraphs A1 – A2.)

Total Staff Entitlement (Excluding Principal)	No. of Posts in Each Rank						
	Graduates			Non-graduates			
	SGM	GM	Sub-total	SAM	AM	CM	Sub-total
1	0	1	1	0	0	0	0
2	1	1	2	0	0	0	0
3	1	2	3	0	0	0	0
4	1	2	3	0	0	1	1
5	2	2	4	0	0	1	1
6	2	3	5	0	0	1	1
7	2	4	6	0	0	1	1
8	3	4	7	0	0	1	1
9	3	5	8	0	0	1	1
10	3	5	8	0	1	1	2
11	4	5	9	0	1	1	2
12	4	6	10	0	1	1	2
13	5	6	11	0	1	1	2
14	5	7	12	0	1	1	2
15	5	8	13	0	1	1	2
16	6	8	14	0	1	1	2
17	6	8	14	0	1	2	3
18	6	9	15	0	1	2	3
19	7	9	16	0	1	2	3
20	7	10	17	0	1	2	3
21	7	11	18	0	1	2	3
22	8	11	19	0	1	2	3
23	8	12	20	0	1	2	3
24	8	12	20	1	1	2	4
25	9	12	21	1	1	2	4
26	9	13	22	1	1	2	4
27	10	13	23	1	1	2	4
28	10	14	24	1	1	2	4
29	10	15	25	1	1	2	4
30	10	15	25	1	1	3	5
31	11	15	26	1	1	3	5
32	11	16	27	1	1	3	5
33	12	16	28	1	1	3	5
34	12	17	29	1	1	3	5
35	12	18	30	1	1	3	5
36	13	18	31	1	1	3	5

Total Staff Entitlement (Excluding Principal)	No. of Posts in Each Rank						
	Graduates			Non-graduates			
	SGM	GM	Sub-total	SAM	AM	CM	Sub-total
37	13	18	31	1	2	3	6
38	13	19	32	1	2	3	6
39	14	19	33	1	2	3	6
40	14	20	34	1	2	3	6
41	15	20	35	1	2	3	6
42	15	21	36	1	2	3	6
43	15	22	37	1	2	3	6
44	15	22	37	1	2	4	7
45	16	22	38	1	2	4	7
46	16	23	39	1	2	4	7
47	17	23	40	1	2	4	7
48	17	24	41	1	2	4	7
49	17	25	42	1	2	4	7
50	17	25	42	2	2	4	8
51	18	25	43	2	2	4	8
52	18	26	44	2	2	4	8
53	19	26	45	2	2	4	8
54	19	27	46	2	2	4	8
55	20	27	47	2	2	4	8
56	20	28	48	2	2	4	8
57	20	28	48	2	2	5	9
58	20	29	49	2	2	5	9
59	21	29	50	2	2	5	9
60	21	30	51	2	2	5	9
61	22	30	52	2	2	5	9
62	22	31	53	2	2	5	9
63	22	32	54	2	2	5	9
64	22	32	54	2	3	5	10
65	23	32	55	2	3	5	10
66	23	33	56	2	3	5	10
67	24	33	57	2	3	5	10
68	24	34	58	2	3	5	10
69	25	34	59	2	3	5	10
70	25	34	59	2	3	6	11
71	25	35	60	2	3	6	11
72	25	36	61	2	3	6	11
73	26	36	62	2	3	6	11
74	26	37	63	2	3	6	11
75	27	37	64	2	3	6	11
76	27	38	65	2	3	6	11
77	27	38	65	3	3	6	12
78	27	39	66	3	3	6	12
79	28	39	67	3	3	6	12



Total Staff Entitlement (Excluding Principal)	No. of Posts in Each Rank						
	Graduates			Non-graduates			
	SGM	GM	Sub-total	SAM	AM	CM	Sub-total
80	28	40	68	3	3	6	12
81	29	40	69	3	3	6	12
82	29	41	70	3	3	6	12
83	30	41	71	3	3	6	12
84	30	41	71	3	3	7	13
85	30	42	72	3	3	7	13
86	30	43	73	3	3	7	13
87	31	43	74	3	3	7	13
88	31	44	75	3	3	7	13
89	32	44	76	3	3	7	13
90	32	44	76	3	4	7	14

(updated on 1 September 2008)

Note:

1. With effect from 1 September 2009, the ratio of graduate teacher posts will be 85%. The 85% graduate teacher entitlement of a school will be worked out based on the total number of teaching posts provided under the revised teacher-to-class ratios under the new senior secondary (NSS) academic structure as announced in the Report on “The New Academic Structure for Senior Secondary Education and Higher Education”.

(updated on 1 September 2009)

2. A special school operating a secondary section and with 15 or more equivalent full-streamed ordinary secondary classes is entitled to two deputy heads at Principal Graduate Master/Mistress (PGM) rank to be offset by an equivalent number of Senior Graduate Master/Mistress (SGM) posts.
3. The arrangements in 3(a) and 3(b) below have ceased since 1 September 2008 upon the enhancement of the graduate teacher ratio:
  - (a) upgrading one Principal Assistant Master/Mistress (PAM) post as deputy head for every two Senior Assistant Master/Mistress (SAM) posts with the PAM post offset by the deletion of one SAM post, if the number of SGM post is insufficient to allow the provision of PGM posts to the maximum number entitled in case of Paragraph 2 above; and
  - (b) upgrading one SAM post to a PAM post for a special school operating a secondary section with 24 or more equivalent full-streamed ordinary secondary classes.

Note: (i) With effect from 1 September 2008, serving PAMs with a recognised degree plus teacher training (or equivalent) may apply for re-grading to SGMs.

(ii) Upon successful re-grading or natural wastage of a serving PAM, the existing practice of upgrading an SAM post to a PAM post will cease with immediate effect. If a serving PAM does not apply for re-grading to SGM, he/she can continue to be accommodated in his/her existing rank of

PAM to hold against an SGM post created under the enhanced graduate teacher ratio accordingly. The respective proportions of SAM, Assistant Master/Mistress (AM) and Certificated Master/Mistress (CM) posts will not be affected by the cessation of this practice.

- (iii) Exceptions to the arrangement spelt out in (ii) above are allowed during the two-year transition period from 1 September 2008 to 31 August 2010. If a PAM post is vacated due to natural wastage or other reasons (excluding re-grading to SGM), the school may consider promoting a serving SAM to fill the vacancy and an SGM post created under the enhanced graduate teacher ratio should be held against accordingly. In case the PAM incumbent is re-graded to SGM during the transition period, the arrangement in (ii) above will apply.
4. One post in the rank of Graduate Master/Mistress (GM) is upgraded to SGM in an aided special school operating 15 or more equivalent full-streamed ordinary secondary classes.
  5. Among the graduate teaching posts, the proportion of SGM and PGM posts should not exceed five-twelfths. This proportion excludes one GM post upgraded to SGM in an aided special school operating 15 or more equivalent full-streamed ordinary secondary classes. Among the non-graduate teaching posts, the proportion of SAM posts should not exceed one-quarter; and the combined proportion of SAM and AM posts should not exceed one-half.

*(updated on 1 September 2008)*

## Section 2

**Salary Scales**

(This Section should be read in conjunction with Section 4.)

A. Teaching staff

<u>Grade/Rank</u>	<u>Salary Scale (Points on the Master Pay Scale)</u>
1. Principal I (Pr I)	45 – 49
2. Principal II (Pr II)	40 – 44
3. Principal Graduate Master/Mistress (PGM)	38 – 41
4. Senior Graduate Master/Mistress (SGM)	34 – 39
5. Graduate Master/Mistress (GM)	17 – 33 if appointed before 1.4.2000 12 – 33 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 17 – 33 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive) 15 – 33 if appointed on/after 1.10.2010

Note:

A GM will not be allowed to proceed beyond the salary bar specified below without acquiring a Post-Graduate Certificate in Education or an equivalent qualification acceptable to the Permanent Secretary:

<u>Date appointed</u>	<u>Salary Bar</u>
Between 5.12.1980 and 31.8.1997 (both dates inclusive)	Point 27
Between 1.9.1997 and 31.3.2000 (both dates inclusive)	Point 22
Between 1.4.2000 and 31.7.2007 (both dates inclusive)	Point 17
Between 1.8.2007 and 30.9.2010 (both dates inclusive)	Point 22
On/after 1.10.2010	Point 20

Remarks:

With effect from 1.8.2007, the salary bar would be set at five pay points above the prevailing starting salary and would be adjusted automatically whenever there is a change in the starting salary in the future. A serving untrained GM without a break in service is subject to the adjusted salary bar or the highest salary bar point he/she has ever experienced in the appointment as GM, whichever is the higher.

6. Headmaster/Headmistress I (HM I)	38 – 41
7. Headmaster/Headmistress II (HM II) (updated on 1 September 2008)	35 – 39
8. Senior Primary School Master/Mistress (SPSM) (updated on 1 September 2008)	34 – 35
9. Primary School Master/Mistress (PSM)	30 – 33

<u>Grade/Rank</u>	<u>Salary Scale (Points on the Master Pay Scale)</u>
10. Assistant Primary School Master/Mistress (APSM)	17 – 29 if appointed before 1.4.2000 12 – 29 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 17 – 29 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive) 15 – 29 if appointed on/after 1.10.2010
<u>Note:</u> Untrained APSM will not be allowed to proceed beyond the salary bar as shown below:	
<u>Date appointed</u>	<u>Salary Bar</u>
Before 1.4.2000	Point 27
Between 1.4.2000 and 30.9.2010 (both dates inclusive)	Point 22
On/after 1.10.2010	Point 20
<u>Remarks:</u> With effect from 1.8.2007, the salary bar would be set at <u>five</u> pay points above the prevailing starting salary and would be adjusted automatically whenever there is a change in the starting salary in the future. A serving untrained APSM without a break in service is subject to the adjusted salary bar or the highest salary bar point he/she has ever experienced in the appointment as APSM, whichever is the higher.	
11. Principal Assistant Master/Mistress (PAM) *	34 – 36 (for secondary and special schools) 34 - 39 (#Bar at 36) (for primary schools)
#	Passage requires acquisition of a Bachelor of Arts Degree in Primary Education, or equivalent.
12. Senior Assistant Master/Mistress (SAM) *	30 – 33 (for secondary and special schools) 30 – 33C (#Bar at 33) (for primary schools)
#	Passage requires acquisition of a Bachelor of Arts Degree in Primary Education, or equivalent.
13. Assistant Master/Mistress (AM) & Assistant Master/Mistress (Workshop Teacher) (AM(WT))	25 – 29
14. Certificated Master/Mistress (CM) & Certificated Master/Mistress (Workshop Teacher) (CM(WT))	14 – 24 if appointed before 1.4.2000: 12 – 24 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 14 – 24 if appointed on/ after 1.8.2007

Note:

Untrained CM/CM(WT) will not be allowed to proceed beyond the salary bar as shown below:

<u>Date appointed</u>	<u>Salary Bar</u>
Between 1.1.1991 and 31.3.2000 (both dates inclusive)	Point 19
Between 1.4.2000 and 31.7.2007 (both dates inclusive)	Point 17
On/after 1.8.2007	Point 19

<u>Grade/Rank</u>	<u>Salary Scale</u> <u>(Points on the Master Pay Scale)</u>
<u>Remarks:</u>	
With effect from 1.8.2007, the salary bar would be set at <u>five</u> pay points above the prevailing starting salary and would be adjusted automatically whenever there is a change in the starting salary in the future. A serving untrained CM/CM(WT) without a break in service is subject to the adjusted salary bar or the highest salary bar point he/she has ever experienced in the appointment as CM/CM(WT), whichever is the higher.	
15. Workshop Instructor I (WI I)	24 – 28
16. Workshop Instructor II (WI II)	14 – 23
<u>Note:</u>	
The Workshop Instructor scales apply to persons appointed before 1 September 1993; and the Workshop Teacher scales apply to persons appointed thereafter and to those Workshop Instructors I or II who were re-graded to CM(WT) or AM(WT) on 1 September 1993 upon successful completion of the conversion course at the Hong Kong Technical Teachers' College. Workshop Instructor experience will not be counted for the purpose of increments for appointment as Certificated Master/Mistress of non-workshop stream.	
17. Unqualified Teacher (UQT)	4
* Primary and special schools – No non-degree holders should be appointed as new school Principals. Serving Principals at AM, SAM and PAM rank who are non-degree holders will be accommodated until natural wastage.	
<i>(updated on 1 September 2010)</i>	

B. Non-teaching staff

<u>Grade/Rank</u>	<u>Salary Scale</u> <u>(Points on the Master Pay Scale)</u>
18. Laboratory Technician	
(a) Laboratory Technician I (LT I)	22 – 28
(b) Laboratory Technician II (LT II)	10 – 21 if appointed before 1.4.2000 6 – 21 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 8 – 21 if appointed on/after 1.8.2007
	<u>(Points on the Training Pay Scale)</u>
(c) Laboratory Technician III (LT III)	4 – 6 if appointed before 1.4.2000 3 – 6 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 4 – 6 if appointed on/after 1.8.2007
<u>Note:</u>	
LT III appointed before 1.8.2007 will, upon promotion to LT II without a break in service, be paid the starting pay point at MPS Point 8.	
19. Educational Psychologist	
(a) Educational Psychologist I (EP I)	34 – 44

<u>Grade/Rank</u>	<u>Salary Scale (Points on the Master Pay Scale)</u>
(b) Educational Psychologist II (EP II)	25 – 33 if appointed before 1.4.2000 20 – 33 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 25 – 33 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive) 23 – 33 if appointed on/after 1.10.2010
20. Speech Therapist (ST)	18 – 33 if appointed before 1.4.2000: 13 – 33 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 18 – 33 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive) 16 – 33 if appointed on/after 1.10.2010
21. Physiotherapist	
(a) Senior Physiotherapist (SPT)	34 – 39
(b) Physiotherapist I (PT I)	25 – 34
<u>Note:</u> Omitted point at Point 30	
(c) Physiotherapist II (PT II)	14 – 24 if appointed before 1.4.2000 12 – 24 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 14 – 24 if appointed on/after 1.8.2007
22. Occupational Therapist	
(a) Senior Occupational Therapist (SOT)	34 – 39
(b) Occupational Therapist I (OT I)	25 – 34
(c) Occupational Therapist II (OT II)	14 – 24 if appointed before 1.4.2000 12 – 24 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 14 – 24 if appointed on/after 1.8.2007
<u>Note:</u> Omitted point at Point 16	
(d) Occupational Therapy Assistant (OTA)	7 – 15
23. Special School Social Worker	
(a) Senior Social Work Assistant (SSWA)	23 – 29
(b) Assistant Social Work Officer (ASWO)	18 – 33 if appointed before 1.4.2000 13 – 33 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 18 – 33 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive)

<u>Grade/Rank</u>	<u>Salary Scale</u> <u>(Points on the Master Pay Scale)</u>
	16 – 33 if appointed on/after 1.10.2010
<u>Note:</u> Omitted points at Point 20, 24 and 30	
24. Warden	
(a) Social Work Officer (SWO)	34 – 39
(b) Assistant Social Work Officer (ASWO)	18 – 33 if appointed before 1.4.2000 13 – 33 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 18 – 33 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive) 16 – 33 if appointed on/after 1.10.2010
<u>Note:</u> Omitted points at Point 20, 24 and 30	
(c) Chief Social Work Assistant (CSWA)	30 – 33
(d) Senior Social Work Assistant (SSWA)	23 – 29
25. Assistant Warden	
(a) Assistant Social Work Officer (ASWO)	18 – 33 if appointed before 1.4.2000 13 – 33 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 18 – 33 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive) 16 – 33 if appointed on/after 1.10.2010 <i>(updated on 1 September 2016)</i>
<u>Note:</u> Omitted points at Points 20, 24 and 30	
(b) Senior Social Work Assistant (SSWA)	23 – 29
(c) Social Work Assistant (SWA)	11 – 22 if appointed before 1.4.2000 7 – 22 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 9 – 22 if appointed on/after 1.8.2007
<u>Note:</u> Omitted point at Point 13	
26. Boarding Service Master/Mistress I	11 – 22 if appointed before 1.4.2000 7 – 22 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 9 – 22 if appointed on/after 1.8.2007
<u>Note:</u> Omitted point at Point 13	
27. Boarding Service Master/Mistress II	7 – 17 if appointed before 1.4.2000

<u>Grade/Rank</u>	<u>Salary Scale</u> <u>(Points on the Master Pay Scale)</u>
	6 – 17 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 7 – 17 if appointed on/after 1.8.2007
28. Nurse	
(a) Registered Nurse (RN)	15 – 25 if appointed before 1.4.2000 13 – 25 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 15 – 25 if appointed on/after 1.8.2007
	<u>Note:</u> Omitted points at Points 17 and 21
(b) Enrolled Nurse (EN)	9 – 21 if appointed before 1.4.2000 5 – 21 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 7 – 21 if appointed on/after 1.8.2007
	<u>Note:</u> Omitted points at Points 11 and 15
29. Braille Staff	8 – 15 if appointed before 1.4.2000 4 – 15 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 6 – 15 if appointed on/after 1.8.2007
30. Houseparent-in-charge	11 – 22 if appointed before 1.4.2000 7 – 22 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 9 – 22 if appointed on/after 1.8.2007
	<u>Note:</u> Omitted point at Point 13
31. Houseparent	11 – 22 if appointed before 1.4.2000 7 – 22 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 9 – 22 if appointed on/after 1.8.2007
	<u>Note:</u> Omitted point at Point 13
32. Programme Worker	11 – 22 if appointed before 1.4.2000 7 – 22 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 9 – 22 if appointed on/after 1.8.2007
	<u>Note:</u> Omitted point at Point 13
33. Clerical staff	
(a) Assistant Clerical Officer (ACO)	3 – 15 if appointed before 1.4.2000 2 – 15 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive)



<u>Grade/Rank</u>	<u>Salary Scale</u> <u>(Points on the Master Pay Scale)</u>
	3 – 15 if appointed on/after 1.8.2007
(b) Clerical Assistant (CA)	1 – 10 if appointed before 1.4.2000 0 – 10 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 1 – 10 if appointed on/after 1.8.2007
34. Artisan	6 – 8 if appointed before 1.4.2000 5 – 8 if appointed on/after 1.4.2000
35. Driver	
(a) Special Driver	9 – 10 if appointed before 1.4.2000 8 – 10 if appointed on/after 1.4.2000
(b) Motor Driver	6 – 8 if appointed before 1.4.2000 5 – 8 if appointed on/after 1.4.2000
36. Cook	6 – 8 if appointed before 1.4.2000 5 – 8 if appointed on/after 1.4.2000
	<u>(Points on the Model Scale I)</u>
37. Workshop Attendant (WA)	4 – 8 if appointed before 1.4.2000 3 – 13 if appointed on/after 1.4.2000
38. Teacher Assistant (for Special Schools)	1 – 3 if appointed before 1.4.2000 0 – 8 if appointed on/after 1.4.2000
39. Watchman	4 – 8 if appointed before 1.4.2000 3 – 13 if appointed on/after 1.4.2000

*(updated on 1 September 2010)*

## Section 3

**Letter of Appointment or Contract of Service and Payment of Salaries on Appointment, Resignation, Retirement or Termination of Appointment****(A) Letter of Appointment or Contract of Service**

The letter of appointment or contract of service should specify:

1. the name of the school and of the employer, this being the Incorporated Management Committee;
2. the date from which the appointment is to have effect;
3. requirements, if any, relating to probation;
4. the conditions of service and, if applicable, any specific language proficiency requirements;
5. the salary to be paid on commencement of the appointment, and any salary scale relating to the post including the annual incremental date;
6. whether such teacher is to contribute to a provident fund; and if so, what such contribution shall be;
7. the entitlement of such teacher to paid sick leave, maternity leave or paternity leave; *(updated on 1 September 2016)*
8. conditions of termination of appointment and the minimum period of notice of termination of the contract to be given by either party wishing to terminate such contract as specified under Section 6 of this Compendium;
9. the conditions relating to payment of salary on the resignation or dismissal of such teacher as specified under Section 6 of this Compendium;
10. that such teacher should act in accordance with the terms of the Education Ordinance and of subsidiary legislation made under that Ordinance, of the Code of Aid and of such instructions as the Permanent Secretary may from time to time issue regarding the conduct of aided schools.

**(B) Payment of Salaries on Appointment, Resignation, Retirement or Termination of Appointment**

1. (a) A teacher with one academic year's service or more without break whose appointment terminates no earlier than the beginning of
  - (i) the major school holidays, i.e., Christmas, Chinese New Year and Easter Holidays will be paid to the end of the school holidays;
  - (ii) the Summer Vacation will be paid to the end of August, subject to completion of duties as assigned by the school during the period concerned.
- (b) A teacher with service of less than one academic year but more than 59 days whose appointment terminates no earlier than the beginning of

- (i) the major school holidays, i.e., Christmas, Chinese New Year and Easter Holidays will be paid to the end of the school holidays;
  - (ii) the Summer Vacation will be paid to the end of July.
- (c) A teacher with service of 59 days or less will be paid up to and including the last day of the performance of full duties.
- (d) A teacher who resigns from one aided school to take up a new appointment in another aided school on the commencement day of a new school year and without break in teaching service, other than such break as the Permanent Secretary may approve, will be paid by the school he leaves for the period up to and including the last day of performance of full duties in that school, and by the school to which he is newly appointed from the day following his last day of performance of full duties in the former school.
2. In a newly-opened aided school, the date of assumption of full duties should normally be deemed to be the date of commencement of classes. The Permanent Secretary may approve, for purposes of grant, the appointment of staff who are required for essential preliminary planning of new schools in advance of the date of commencement of classes, and in the case of reprovisioned schools, he may approve the continued payment of the salaries of staff of the original school should the completion of the building be delayed beyond the scheduled date.

## Section 4

**Qualifications for New Recruits**

The guides to appointments in respect of the following grades/ranks are shown in sections 4.1 to 4.44.

**Teaching Staff**

- 4.1 Principal I (Pr I)
- 4.2 Principal II (Pr II)
- 4.3 Principal Graduate Master/Mistress (PGM)
- 4.4 Senior Graduate Master/Mistress (SGM)
- 4.5 Graduate Master/Mistress (GM)
- 4.6 Headmaster/Headmistress I (HMI)
- 4.7 Headmaster/Headmistress II (HMII)
- 4.8 Senior Primary School Master/Mistress (SPSM)
- 4.9 Primary School Master/Mistress (PSM)
- 4.10 Primary School Master/Mistress (Student Guidance Teacher) (PSM(SGT))
- 4.11 Assistant Primary School Master/Mistress (APSM)
- 4.12 Principal Assistant Master/Mistress (PAM)
- 4.13 Senior Assistant Master/Mistress (SAM)
- 4.14 Assistant Master/Mistress (AM)
- 4.15 Assistant Master/Mistress (Student Guidance Teacher) (AM(SGT))
- 4.16 Assistant Master/Mistress (Workshop Teacher) (AM(WT))
- 4.17 Certificated Master/Mistress (CM)
- 4.18 Certificated Master/Mistress (Workshop Teacher) (CM(WT))
- 4.19 Teacher Assisting in Speech Therapy (TAST)
- 4.20 Mobility Instructor
- 4.21 Resource Teacher
- 4.22 Low-vision Training Teacher

*Aspiring Principals are required to attain Certification for Principalship in addition to complying with the appointment conditions in force at the time before their appointment to principalship.*

**Non-teaching Staff**

- 4.23 Laboratory Technician I, II, III (LT I, II, III)
- 4.24 Educational Psychologist I (EP I)
- 4.25 Educational Psychologist II (EP II)
- 4.26 Speech Therapist (ST)
- 4.27 Senior Physiotherapist (SPT), Physiotherapist I, II (PT I, II)
- 4.28 Senior Occupational Therapist (SOT), Occupational Therapist I, II (OT I,

- II)
- 4.29 Occupational Therapy Assistant (OTA)
  - 4.30 Special School Social Worker
  - 4.31 Warden
  - 4.32 Assistant Warden
  - 4.33 Boarding Service Master/Mistress I, II
  - 4.34 Registered Nurse (RN)
  - 4.35 Enrolled Nurse (EN)
  - 4.36 Braille Staff
  - 4.37 Houseparent-in-charge
  - 4.38 Houseparent/Programme Worker
  - 4.39 Assistant Clerical Officer (ACO)
  - 4.40 Clerical Assistant (CA)
  - 4.41 Artisan II
  - 4.42 Special Driver
  - 4.43 Motor Driver
  - 4.44 Teacher Assistant (for Special Schools)

Workshop Attendant, Watchman and Cook

For the appointment to the grades of workshop attendant, watchman and cook, no special qualifications are required.

Section 4.1**Guide to Appointment****Principal I (Pr I)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:(a) Promotion

Promotion rank for Principals II or Principal Graduate Masters/Mistresses or Senior Graduate Masters/Mistresses.

(b) Direct Appointment

Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.

Type of Work:Secondary Schools

Principal of a secondary school with 24 or more classes.

Special Schools

Principal of a special school operating Secondary 1-5 and with 24 or more equivalent full-streamed ordinary secondary classes.

Promotion Prospects:

N.A.

Any Other Remarks:

With effect from the 2002/03 school year, a school Principal appointed by direct appointment to a headship post in another aided school at the same substantive rank of his former headship post without a break in service is allowed to retain the salary pay point he received in the former post; if there is a break in service, he should be remunerated at the minimum point of the pay scale.

Section 4.2**Guide to Appointment****Principal II (Pr II)**

(For information: This document is not part of any agreement of service.)

- Appointment Requirements:
- (a) Promotion  
Promotion rank for Principal Graduate  
Masters/Mistresses or Senior Graduate  
Masters/Mistresses.
- (b) Direct Appointment  
Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.
- Type of Work:
- Secondary Schools  
Principal of a secondary school with 15 to 23 classes.
- Special Schools  
Principal of a special school operating secondary classes and with 15 to 23 equivalent full-streamed ordinary secondary classes.
- Promotion Prospects: Principal I
- Any Other Remarks: With effect from the 2002/03 school year, a school Principal appointed by direct appointment to a headship post in another aided school at the same substantive rank of his former headship post without a break in service is allowed to retain the salary pay point he received in the former post; if there is a break in service, he should be remunerated at the minimum point of the pay scale.

Section 4.3**Guide to Appointment****Principal Graduate Master/Mistress (PGM)**

(For information: This document is not part of any agreement of service.)

- Appointment Requirements:
- (a) Promotion  
Promotion rank for Senior Graduate Masters/Mistresses.
  - (b) Direct Appointment  
Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.
- Type of Work:
- Secondary Schools
- (a) Principal of a secondary school with 14 or fewer classes; or
  - (b) Deputy head of a secondary school with 15 or more classes in addition to class teaching up to Secondary 6.
- (updated on 1 April 2013)*
- Special Schools
- (a) Principal of a special school operating secondary classes and with 14 or fewer equivalent full-streamed ordinary secondary classes; or
  - (b) Deputy head of a special school operating secondary classes and with 15 or more equivalent full-streamed ordinary secondary classes.
- Promotion Prospects: Principal I/II
- With effect from the 2004/05 school year, aspiring principals are required to attain the Certification for Principalship, in addition to complying with the appointment conditions in force at the time, before they could be considered for appointment to principalship.  
*(updated on 1 September 2005)*
- Any Other Remarks: In the case of promotion to Principal II, as the salary scale of a Principal Graduate Master/Mistress overlaps that of a Principal II (MPS Point 40 – 44), the promotees' salary scale and incremental date will be determined as follows:
- (a) If their pay before promotion is less than the minimum of the pay scale of the new higher office by more than one point, they will enter at the



- minimum and their new incremental date will be determined by the date of their promotion;
- (b) If their pay before promotion is less than the minimum of the pay scale of the new higher office by not more than one point, they will enter at the minimum and retain their existing incremental date;
  - (c) If their pay before promotion is not less than the minimum of the pay scale of the new higher office and subject to the maximum point of the new scale not being exceeded, they will enter the new scale at the point which is next above their pay and retain their existing incremental date; and
  - (d) If the promotees are already receiving the maximum pay of their former office at the date of promotion, they will enter the new scale at the point next above their pay and their new incremental date will be determined by the date of promotion.
  - (e) With effect from the 2002/03 school year, a school Principal appointed by direct appointment to a headship post in another aided school at the same substantive rank of his/her former headship post without a break in service is allowed to retain the salary pay point he/she received in the former post; if there is a break in service, he/she should be remunerated at the minimum point of the pay scale.

Section 4.4**Guide to Appointment****Senior Graduate Master/Mistress (SGM)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Promotion/Re-grading
- (i) Promotion – Promotion rank for Graduate Masters/Mistresses.
  - (ii) Re-grading – A Principal Assistant Master/Mistress with a local first degree plus teacher training qualifications (or equivalent) is eligible for consideration for re-grading in his/her serving school as Senior Graduate Master/Mistress. *(updated on 1 September 2008)*
- (b) Direct Appointment  
Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.

Type of Work:Secondary Schools

- (a) In charge of an academic/cultural/practical subject up to HKDSE Examination level; or  
*(updated on 1 April 2013)*
- (b) Performing duties of special responsibility; or
- (c) Other related duties as considered appropriate in addition to class teaching up to Secondary 6 level in a secondary school. *(updated on 1 April 2013)*

Special Schools

- (a) In charge of an academic subject in the secondary section of a special school; or
- (b) Performing duties of special responsibility; or
- (c) Other related duties as considered appropriate in addition to class teaching up to Secondary 5 level in a special school.

Promotion Prospects:

Principal Graduate Master/Mistress, Principal II or Principal I

Senior Graduate Masters/Mistresses will be eligible for consideration for promotion to Principal Graduate Master/Mistress, Principal II or Principal I after they have had at least three years of acceptable secondary school experience in the post in a government or aided or Direct Subsidy Scheme secondary school (for the post in an aided secondary school) or the secondary section of an

aided special school (for the post in an aided special school) or, since 1 September 1990, a caput or assisted private school or a bought-place school bound by contract with proven ability to take charge of an academic/cultural/practical subject or to perform other duties of special responsibility and have undertaken training course(s), including training in secondary school administration/management, specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium. With effect from the 2004/05 school year, aspiring principals are required to attain the Certification for Principalship, in addition to complying with the appointment conditions in force at the time, before they could be considered for appointment to principalship. *(updated on 1 September 2016)*

Any Other Remarks:

- (a) In the case of promotion to Principal Graduate Master/Mistress, as the salary scale of a Senior Graduate Master/Mistress overlaps that of a Principal Graduate Master/Mistress (MPS Point 38 – 41), the promotees' salary scale and incremental date will be determined as follows:
- (i) if their pay before promotion is less than the minimum of the pay scale of the new higher office by more than one point, they will enter at the minimum and their new incremental date will be determined by the date of their promotion;
  - (ii) if their pay before promotion is less than the minimum of the pay scale of the new higher office by not more than one point, they will enter at the minimum and retain their existing incremental date;
  - (iii) if their pay before promotion is not less than the minimum of the pay scale of the new higher office and subject to the maximum point of the new scale not being exceeded, they will enter the new scale at the point which is next above their pay and retain their existing incremental date; and
  - (iv) if the promotees are already receiving the maximum pay of their former office at the date of promotion, they will enter the new scale at the point next above their pay and their new incremental date will be determined by the date of promotion.

- (b) The salary scale and incremental date of a Senior Graduate Master/Mistress re-graded from the rank of Principal Assistant Master/Mistress will be determined as follows:
- (i) if immediately before re-grading, his/her pay is less than the minimum of the pay scale of the new office, he/she will receive the minimum. The new incremental date will be determined by the date of re-grading;
  - (ii) if his/her pay is the same or more than the minimum and not more than the maximum of the pay scale of the new office, he/she will continue to receive his/her existing pay in the former post. The new incremental date still be determined by the date of re-grading;
  - (iii) if he/she is re-graded on his/her incremental date, for the purpose of these rules, his/her pay before re-grading will be taken to be the pay he/she would have received on that date had he/she not been re-graded; and
  - (iv) if the date of re-grading falls on or between the 1st and the 15th of the month, the incremental date will be taken to be the first day of that month. If the date of re-grading falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.

*(updated on 1 September 2008)*

Section 4.5**Guide to Appointment****Graduate Master/Mistress (GM)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:(a) New Recruitment

A degree from a local university, or equivalent (the degree means a Bachelor degree).

Note: Preference will be given to candidates with a Post-Graduate Certificate in Education or an equivalent qualification acceptable to the Permanent Secretary.

(b) Re-grading

A Certificate Master/Mistress, Assistant Master/Mistress or Senior Assistant Master/Mistress with a local first degree or equivalent is eligible for consideration for re-grading in his/her serving school as Graduate Master/Mistress. *(updated on 1 September 2008)*

Type of Work:Secondary Schools

- (a) Class teacher in a secondary school, and
- (b) Other related duties as considered appropriate.

Special Schools

- (a) Class teacher in the secondary section of a special school; or
- (b) Resource teacher for special programmes; and
- (c) Other related duties as considered appropriate.

Promotion Prospects:

## Senior Graduate Master/Mistress

Graduate Masters/Mistresses will be eligible for consideration for promotion to Senior Graduate Master/Mistress provided they have obtained a Post-Graduate Certificate in Education, or an equivalent qualification acceptable to the Permanent Secretary (and for special school, who have successfully completed a course of training in special education recognised by the Permanent Secretary); and have had five years of acceptable secondary school experience in a graduate post in a government or aided or Direct Subsidy Scheme or assisted private secondary school or, since 1 September 1990, in a caput or bought-place school bound by contract, and have clearly shown ability to take charge of an academic/cultural/practical subject or to perform other duties of special responsibility in a secondary school; and have undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management

Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

*(updated on 2 January 2014)*

Graduate Masters/Mistresses not possessing an appropriate Post-Graduate Certificate in Education or an equivalent qualification acceptable to the Permanent Secretary but appointed prior to 1 September 1978 will be eligible for consideration for promotion to Senior Graduate Masters/Mistresses provided that they have completed training as specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

Any Other Remarks:

(a) Untrained Graduate Masters/Mistresses will not be allowed to proceed beyond the salary bar specified below without acquiring an acceptable teacher training qualification:

(i) Bar at MPS point 27 for those appointed between 5 December 1980 and 31 August 1997 (both dates inclusive);

(ii) Bar at MPS point 22 for those appointed between 1 September 1997 and 31 March 2000 (both dates inclusive);

(iii) Bar at MPS point 17 for those appointed between 1 April 2000 and 31 July 2007 (both dates inclusive);

(iv) Bar at MPS point 22 for those appointed between 1 August 2007 and 30 September 2010 (both dates inclusive);

(v) Bar at MPS point 20 for those appointed on/after 1 October 2010.

With effect from 1 August 2007, the salary bar would be set at five pay points above the prevailing starting salary and would be adjusted automatically whenever there is a change in the starting salary in the future. A serving untrained Graduate Master/Mistress without a break in service is subject to the adjusted salary bar or the highest salary bar point he/she has ever experienced in the appointment as Graduate Master/Mistress, whichever is the higher.

*(updated on 1 September 2010)*

(b) Direct entrants with a Degree, but no Post-Graduate Certificate in Education or Teacher's Certificate or equivalent teacher training qualification acceptable

- to the Permanent Secretary, will enter at the minimum of the salary scale;
- (c) Direct entrants with a Degree plus an appropriate Post-Graduate Certificate in Education or Teacher's Certificate or an equivalent teacher training qualification acceptable to the Permanent Secretary, will enter at the third point in the salary scale;
  - (d) Entrants having teaching experience acceptable to the Permanent Secretary will be awarded increments in the salary scale;
  - (e) Serving Graduate Masters/Mistresses who acquire an appropriate Post-Graduate Certificate in Education or an equivalent teacher training qualification acceptable to the Permanent Secretary after pursuing a full-time or part-time course will be awarded two additional increments if they entered at the first point in accordance with paragraph (b) under Any Other Remarks or have not been previously awarded additional increments on the strength of such, provided that the maximum of the salary scale is not exceeded;
  - (f) With effect from 1 September 1995, holders of a non-local degree with an appropriate Post-Graduate Certificate in Education obtained from a local university will enter at the third point in the salary scale, irrespective of whether the non-local degree is equivalent to a local degree.
  - (g) With effect from 1 September 2003, an untrained teacher re-graded from a non-graduate rank to Graduate Master/Mistress, who subsequently acquires acceptable teacher training qualification, will:
    - (i) be eligible for the award of two additional increments if, other than through possession of recognised experience, he/she entered at the minimum point of the Graduate Master/Mistress pay scale prevailing at the time he/she was re-graded, provided that the maximum of the pay scale is not exceeded; or
    - (ii) be eligible for the award of one additional increment if, other than through possession of recognised experience, he/she entered at one point above the minimum point of the Graduate Master/Mistress pay scale prevailing at the time he/she was re-graded, provided that the maximum of the pay scale is not exceeded; or

- (iii) not be eligible for the award of any additional increment if, other than through possession of recognised experience, he/she entered at two or more points above the minimum point of the Graduate Master/Mistress pay scale prevailing at the time he/she was re-graded.

*(updated on 2 January 2014)*

- (h) The salary scale and incremental date of a Graduate Master/Mistress re-graded from the rank of Senior Assistant Master/Mistress, Assistant Master/Mistress or Certificated Master/Mistress will be determined as follows:

- (i) if immediately before re-grading, his/her pay is less than the minimum of the pay scale of the new office, he/she will receive the minimum. The new incremental date will be determined by the date of re-grading;
- (ii) if his/her pay is the same or more than the minimum and not more than the maximum of the pay scale of the new office, he/she will continue to receive his/her existing pay in the former post. The new incremental date will be determined by the date of re-grading;
- (iii) if he/she is re-graded on his/her incremental date, for the purpose of these rules, his/her pay before re-grading will be taken to be the pay he/she would have received on that date had he/she not been re-graded; and
- (iv) if the date of re-grading falls on or between the 1st and the 15th of the month, the incremental date will be taken to be the first day of that month. If the date of re-grading falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.

*(updated on 1 September 2008)*



Section 4.6**Guide to Appointment****Headmaster/Headmistress I (HMI)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Promotion/Re-grading
- (i) Promotion – Promotion rank for Headmasters/Headmistresses II.
  - (ii) Re-grading – A Principal Assistant Master/Mistress# serving in the nominating primary/primary special school with a recognised local first degree or equivalent is eligible for consideration for re-grading as Headmaster/Headmistress I.
- (b) Direct Appointment
- (i) Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.
  - (ii) Starting from the 2000/01 school year, new school Principals should be limited to candidates holding a recognised local first degree plus teacher training in primary education (and special education in case of special schools), or equivalent qualifications.

Type of Work:Primary Schools

Principal of a primary school with 24 or more classes.

Special Schools

Principal of a primary special school with 24 or more equivalent ordinary primary classes.

Promotion Prospects:

N.A.

- (a) The salary scale and incremental date of Headmaster/Headmistress I re-graded from the rank of Principal Assistant Master/Mistress will be determined as follows:
- (i) If immediately before re-grading, their pay is less than the minimum of the pay scale of the new office, they will receive the minimum. The new incremental date will be determined by the date of re-grading;
  - (ii) If their pay is the same or more than the minimum and not more than the maximum of

- the pay scale of the new office, they will receive the salary point which is equivalent to their existing substantive salary. The new incremental date will be determined by the date of re-grading;
- (iii) If they are re-graded on their incremental date, for the purpose of these rules, their pay before re-grading will be taken to be the pay they would have received on that date had they not been re-graded; and
  - (iv) If the date of re-grading falls on or between the 1st and the 15th day of the month, the incremental date will be taken to be the first day of that month. If the resultant date falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.
- (b) With effect from the 2002/03 school year, a school Principal appointed by direct appointment to a headship post in another aided school at the same substantive rank of his/her former headship post without a break in service is allowed to retain the salary pay point he/she received in the former post; if there is a break in service, he/she should be remunerated at the minimum point of the pay scale.

# The PAM rank will be phased out through natural wastage.

*(updated on 1 September 2008)*

Section 4.7**Guide to Appointment****Headmaster/Headmistress II (HMII)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Promotion/Re-grading
- (i) Promotion – Promotion rank for Senior Primary School Masters/Mistresses or Primary School Masters/Mistresses. *(updated on 1 September 2008)*
  - (ii) Re-grading – A Senior Assistant Master/Mistress# serving in the nominating primary/primary special school with a recognised local first degree or equivalent is eligible for consideration for re-grading as Headmaster/Headmistress II.
- (b) Direct Appointment
- (i) Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.
  - (ii) Starting from the 2000/01 school year, new school Principals should be limited to candidates holding a recognised local first degree plus teacher training in primary education (and special education in case of special schools), or equivalent qualifications.

Type of Work:Primary Schools

Principal of a primary school with 12 to 23 classes.

Special Schools

Principal of a primary special school with 12 to 23 equivalent ordinary primary classes.

Promotion Prospects:Headmaster/Headmistress I

Headmasters/Headmistresses II will be eligible for consideration for promotion to Headmaster/Headmistress I after they have served successfully as follows in a government or aided or Direct Subsidy Scheme primary school (for the post in an aided primary school) / primary special school (for the post in an aided special school) for at least 3 years:

*(updated on 1 September 2016)*

Either

- (i) as a Headmaster/Headmistress II; or
- (ii) as a Senior Assistant Master/Mistress and then as a Headmaster/Headmistress II.

Any Other Remarks:

- (a) In the case of promotion to Headmaster/Headmistress I, as the salary scale of a Headmaster/Headmistress II overlaps that of a Headmaster/Headmistress I (MPS Pt 38-41), the promotees' salary scale and incremental date will be determined as follows:
  - (i) If their pay before promotion is less than the minimum of the pay scale of the new higher office by more than one point, they will enter at the minimum and their new incremental date will be determined by the date of their promotion;
  - (ii) If their pay before promotion is less than the minimum of the pay scale of the new higher office by not more than one point, they will enter at the minimum and retain their existing incremental date;
  - (iii) If their pay before promotion is not less than the minimum of the pay scale of the new higher office and subject to the maximum point of the new scale not being exceeded, they will enter the new scale at the point which is next above their pay and retain their existing incremental date; and
  - (iv) If the promotees are already receiving the maximum pay of their former office at the date of promotion, they will enter the new scale at the point next above their pay and their new incremental date will be determined by the date of promotion.
- (b) The salary scale and incremental date of Headmaster/Headmistress II re-graded from the rank of Senior Assistant Master/Mistress will be determined as follows:
  - (i) If immediately before re-grading, their pay is less than the minimum of the pay scale of the new office, they will receive the minimum. The new incremental date will be determined by the date of re-grading;
  - (ii) If their pay is the same or more than the minimum and not more than the maximum of the pay scale of the new office, they will receive the salary point which is equivalent to

- their existing substantive salary. The new incremental date will be determined by the date of re-grading;
- (iii) If they are re-graded on their incremental date, for the purpose of these rules, their pay before re-grading will be taken to be the pay they would have received on that date had they not been re-graded; and
  - (iv) If the date of re-grading falls on or between the 1st and the 15th day of the month, the incremental date will be taken to be the first day of that month. If the resultant date falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.
- (c) With effect from the 2002/03 school year, a school Principal appointed by direct appointment to a headship post in another aided school at the same substantive rank of his/her former headship post without a break in service is allowed to retain the salary pay point he/she received in the former post; if there is a break in service, he/she should be remunerated at the minimum point of the pay scale for the rank.

#The SAM rank will be phased out through natural wastage.

*(updated on 1 September 2011)*

Section 4.8**Guide to Appointment****Senior Primary School Master/Mistress (SPSM) – as Principal or Deputy Head**

(For information: This document is not part of any agreement of service.)

<u>Appointment Requirements:</u>	<p>(a) <u>Promotion</u> Promotion rank for Primary School Master/Mistress and Assistant Master/Mistress with a local first degree or equivalent.</p> <p>(b) <u>Direct Appointment</u></p> <p>(i) Candidates should possess a local first degree plus teacher training in primary education, or equivalent qualifications (for special schools, and have successfully completed a course of training in special education recognised by the Permanent Secretary). They should also fulfill all the requirements set for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.</p> <p>(ii) Starting from the 2000/01 school year, new school Principals and deputy heads should be limited to candidates holding a local first degree plus teacher training in primary education (and special education in the case of special schools), or equivalent qualifications.</p>
<u>Type of Work:</u>	<p><u>Primary Schools</u> Either as the Principal of a primary school with 11 or less classes, or as the deputy head of a primary school with 12 or more classes.</p> <p><u>Special Schools</u> Either as the Principal of a primary special school with 11 equivalent ordinary primary classes or less, or as the deputy head of a primary special school or the primary section of a special school with 12 equivalent ordinary primary classes or more.</p>
<u>Promotion Prospects:</u>	<p>Headmaster/Headmistress II</p> <p>Senior Primary School Masters/Mistresses will be eligible for consideration for promotion to Headmaster/Headmistress II after they have served successfully as follows in a government or aided or Direct Subsidy Scheme primary school (for the post in an aided primary school) / primary special school or the primary</p>

section of a special school (for the post in an aided special school) for at least 5 years:

*(updated on 1 September 2016)*

Either

- (i) as a Senior Primary School Master/Mistress; or
- (ii) as an Assistant Master/Mistress or a Primary School Master/Mistress and then as a Senior Primary School Master/Mistress.

Any Other Remarks:

- (a) In the case of promotion to Headmaster / Headmistress II, as the salary scale of a Senior Primary School Master/Mistress overlaps that of a Headmaster/Headmistress II (M.P.S. Pt 35-39), the promotees' salary scale and incremental date will be determined as follows:

- (i) If their pay before promotion is less than the minimum of the pay scale of the new higher office, they will enter at the minimum and retain their existing incremental date; and
- (ii) If the promotees are already receiving the maximum pay of their former office at the date of promotion, they will enter the new scale at the point next above their pay and their new incremental date will be determined by the date of promotion.

- (b) With effect from 2004/05 school year, aspiring principals are required to attain the Certification for Principalship in addition to complying with the appointment conditions in force at the time before they could be considered for appointment to principalship.

*(updated on 1 September 2011)*

Section 4.9**Guide to Appointment****Primary School Master/Mistress (PSM) – as Senior Teacher**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Promotion/Re-grading
- (i) Promotion – Promotion rank for Assistant Primary School Masters/Mistresses.
  - (ii) Re-grading – An Assistant Master/Mistress [including Assistant Master/Mistress (Student Guidance Teacher)] serving in the nominating primary/primary special school or the primary section of a special school with a recognised local first degree or equivalent is eligible for consideration for re-grading as Primary School Master/Mistress.
- (b) Direct Appointment  
Candidates should possess a local first degree plus teacher training in primary education, or equivalent qualifications (and for special schools, have successfully completed a course of training in special education recognised by the Permanent Secretary). They should also fulfill all the requirements set for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.

Type of Work:Primary Schools

Senior teacher with duties in addition to class teaching.

Special Schools

Senior teacher with duties in addition to class teaching in the primary section of a special school.

Promotion Prospects:

Senior Primary School Master/Mistress or Headmaster/Headmistress II

- (a) Senior Primary School Master/Mistress

A Primary School Master/Mistress will be eligible for consideration for promotion to a Senior Primary School Master/Mistress after he/she has served successfully as a senior teacher in a government or aided or Direct Subsidy Scheme primary school (for the post of an aided primary school) / primary special school or the primary section of a special school (for the post of an aided special school) for



at least 2 years, and undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria / guiding principles as prescribed in Section 5 of this Compendium.

*(updated on 1 September 2016)*

(b) Headmaster/Headmistress II

A Primary School Master/Mistress will be eligible for consideration for promotion to a Headmaster/Headmistress II after he/she has served successfully as follows in a government or aided or Direct Subsidy Scheme primary school (for the post of an aided primary school) / primary special school or the primary section of a special school (for the post of an aided special school) for at least 5 years: *(updated on 1 September 2016)*

Either

- (i) as a Primary School Master/Mistress; or
- (ii) as an Assistant Master/Mistress and then as a Primary School Master/Mistress

With effect from the 2004/05 school year, aspiring principals are required to attain the Certification for Principalship in addition to complying with the appointment conditions in force at the time before they could be considered for appointment to principalship.

Any Other Remarks:

Primary School Masters/Mistresses re-graded from the rank of Assistant Master/Mistress will enter at the minimum of the Primary School Master/Mistress pay scale with their new incremental date determined by the date of their re-grading. If the date of re-grading falls on or between the 1st and the 15th day of the month, the incremental date will be taken to be the first day of that month. If the date of re-grading falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.

*(updated on 1 September 2008)*

Section 4.10**Guide to Appointment****Primary School Master/Mistress – as Student Guidance Teacher (SGT)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Re-grading  
A serving Assistant Master/Mistress (Student Guidance Teacher) with a local first degree or equivalent is eligible for consideration for re-grading as Primary School Master/Mistress (Student Guidance Teacher) under sponsor-based entitlement.
- (b) Direct Appointment
- (i) Candidates should possess a local first degree plus teacher training in primary education, or equivalent qualifications. They should also have completed successfully the necessary training in student guidance and should possess no less than five years' experience in government/aided/Direct Subsidy Scheme primary school(s), with at least two of which as Student Guidance Teachers. Necessary training refers to the Pre-service Training Course for Student Guidance Teachers conducted by the former Education Department, the former Education and Manpower Bureau or the Education Bureau, or the Certificate Course on Student Guidance for Teachers of Primary Schools conducted by a local tertiary institute or its equivalent.  
*(updated on 2 January 2014)*
- (ii) The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.

Type of Work:

In addition to performing duties in his/her serving primary school(s), a Primary School Master/Mistress (Student Guidance Teacher) is expected to assist his/her sponsoring body in the following areas:

- (a) Overall coordination of student guidance service and the implementation of the Comprehensive Student Guidance Service;
- (b) Co-ordination of staff development for Student Guidance Teachers;
- (c) Mobilisation of community resources in the delivery of student guidance service among its primary schools;

- (d) Overall evaluation of the student guidance service;
- (e) Identification and sharing of good practices among Student Guidance Teachers.

Promotion Prospects: N.A.

- Any Other Remarks:
- (a) The entitlement and appointment of these posts are considered separately under the same sponsoring body.
  - (b) A Primary School Master/Mistress (Student Guidance Teacher) re-graded from the rank of Assistant Master/Mistress (Student Guidance Teacher) will enter at the minimum of the Primary School Master/Mistress pay scale with his/her new incremental date determined by the date of re-grading. If the date of re-grading falls on or between the 1st and the 15th day of the month, the incremental date will be taken to be the first day of that month. If the date of re-grading falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.

*(updated on 1 September 2008)*

Section 4.11**Guide to Appointment****Assistant Primary School Master/Mistress (APSM)**

(For information: This document is not part of any agreement of service.)

- Appointment Requirements:
- (a) New Recruitment  
Candidates should possess a recognised local first degree plus teacher training in primary education, or equivalent qualifications.
  - (b) Re-grading  
A Certificated Master/Mistress serving in the nominating primary/primary special school or the primary section of a special school with a recognised local first degree or equivalent is eligible for consideration for re-grading as Assistant Primary School Master/Mistress.
- Type of Work: Mainly deployed as teacher of senior primary classes.
- Promotion Prospects: Primary School Master/Mistress
- Assistant Primary School Masters/Mistresses possessing a Post-graduate Diploma/Certificate in Education, or a Teacher's Certificate from a local College of Education/the Hong Kong Institute of Education, or equivalent (and for special schools, who have successfully completed a course of training in special education recognised by the Permanent Secretary) will be eligible for consideration for promotion to Primary School Master/Mistress after they have served successfully as follows in a government or aided or Direct Subsidy Scheme primary school (for the post in an aided primary school) /primary special school or the primary section of a special school (for the post in an aided special school) for at least 5 years and undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium: *(updated on 1 September 2016)*
- Either
- (i) as an Assistant Primary School Master/Mistress; or
  - (ii) as a Certificated Master/Mistress and then as an Assistant Primary School Master/Mistress.
- Any Other Remarks:
- (a) Untrained Assistant Primary School Masters/Mistresses will not be allowed to proceed beyond the salary bar as specified below without

acquiring an acceptable teacher training qualification:

- (i) Bar at MPS point 27 for those appointed before 1 April 2000;
- (ii) Bar at MPS point 22 for those appointed between 1 April 2000 and 30 September 2010 (both dates inclusive);
- (iii) Bar at MPS point 20 for those appointed on/after 1 October 2010

With effect from 1 August 2007, the salary bar would be set at five pay points above the prevailing starting salary and would be adjusted automatically whenever there is a change in the starting salary in the future. A serving untrained Assistant Primary School Master/Mistress without a break in service is subject to the adjusted salary bar or the highest salary bar point he/she has ever experienced in the appointment as Assistant Primary School Master/Mistress, whichever is the higher.

- (b) Candidates without a Post-graduate Diploma/Certificate in Education, or a Teacher's Certificate from a local College of Education/the Hong Kong Institute of Education, or equivalent teacher training qualification will enter at the minimum of the pay scale on appointment.
- (c) Candidates who also possess an appropriate Post-graduate Diploma/Certificate in Education, or a Teacher's Certificate from a local College of Education/the Hong Kong Institute of Education, or equivalent teacher training qualification will enter at the third point in the pay scale on appointment.
- (d) Starting from 21 February 2002, the arrangement for the salary bar of serving untrained teachers upon their re-grading from a non-graduate rank to the rank of Assistant Primary School Master/Mistress, is as follows:
  - (i) If the pay point of the teachers concerned on the appointment to the rank of Assistant Primary School Master/Mistress is below the prevailing salary bar of their new post, they can progress along the respective pay scale to the new salary bar point. Subject to the acquisition of acceptable teacher training qualification, they can proceed beyond the appropriate salary bar point to the maximum of the respective pay scale; and
  - (ii) If the pay point of the teachers concerned on

appointment to the rank of Assistant Primary School Master/Mistress is at or above the prevailing salary bar of their new post (due to, for example, the retention of their existing pay in the former non-graduate post under the special pay on appointment arrangements), their salary will be frozen at that pay point. Progression beyond the frozen pay point is subject to their acquisition of acceptable teacher training qualification, provided that the maximum of the respective pay scale is not exceeded.

- (e) Serving Assistant Primary School Masters/Mistresses who acquire a Post-graduate Diploma/Certificate in Education, or a Teacher's Certificate from a local College of Education/the Hong Kong Institute of Education, or equivalent teacher training qualification after pursuing a full-time or part-time course will be awarded two additional increments if they entered at the first point in accordance with paragraph (b) under Any Other Remarks or have not been previously awarded additional increments on the strength of such, provided that the maximum of the salary scale is not exceeded. However, with effect from 1 September 2003, untrained teachers re-graded from Certificated Master/Mistress to Assistant Primary School Master/Mistress, who subsequently acquire acceptable teacher training qualification, will:
- (i) be eligible for the award of two additional increments if, other than through possession of recognised experience, they entered at the minimum point of the Assistant Primary School Master/Mistress pay scale prevailing at the time they were re-graded, provided that the maximum of the pay scale is not exceeded; or
  - (ii) be eligible for the award of one additional increment if, other than through possession of recognised experience, they entered at one point above the minimum point of the Assistant Primary School Master/Mistress pay scale prevailing at the time they were re-graded, provided that the maximum of the pay scale is not exceeded; or
  - (iii) not be eligible for the award of any additional increment if, other than through possession of recognised experience, they entered at two or

more points above the minimum point of the Assistant Primary School Master/Mistress pay scale prevailing at the time they were re-graded.

*(updated on 2 January 2014)*

(f) The salary scale and incremental date of Assistant Primary School Masters/Mistresses re-graded from the rank of Certificated Master/Mistress will be determined as follows:

(i) If immediately before re-grading, their pay is less than the minimum of the pay scale of the new office, they will receive the minimum. The new incremental date will be determined by the date of re-grading.

(ii) If their pay is the same or more than the minimum and not more than the maximum of the pay scale of the new office, they will continue to receive their existing pay in the former post. The new incremental date will be determined by the date of re-grading;

(iii) If they are re-graded on their incremental date, for the purpose of these rules, their pay before re-grading will be taken to be the pay they would have received on that date had they not been re-graded; and

(iv) If the date of re-grading falls on or between the 1st and the 15th day of the month, the incremental date will be taken to be the first day of that month. If the date of re-grading falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.

*(updated on 1 September 2010)*

Section 4.12**Guide to Appointment****Principal Assistant Master/Mistress (PAM)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Promotion  
Promotion rank for Senior Assistant Masters/Mistresses. Please refer to *Any Other Remarks* below.
- (b) Direct Appointment  
Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.

Type of Work:Secondary Schools

- (a) Class teaching of academic subjects up to Secondary 5 level and / or of cultural / technical / practical subjects up to Secondary 6 level in a secondary school; and (*updated on 1 April 2013*)
- (b) Coordinating pastoral care and extra-curricular activities and attending to special needs of students in junior forms.

Primary Schools

Principal of a primary school with 24 or more classes.

Special Schools

- (a) Coordinating pastoral care and extra curricular activities and attending to special needs of students in junior forms in addition to teaching duties in the secondary section of a special school.
- (b) Performing duties of special responsibility in the capacity of deputy head of a special school operating a secondary section.

Promotion Prospects: N.A.

Any Other Remarks:Secondary Schools

Starting from the 2008/09 school year, Principal Assistant Masters/Mistresses with a recognised degree plus teacher training (or equivalent) may apply for re-grading to Senior Graduate Masters/Mistresses in his/her serving school to fill up new Senior Graduate Master/Mistress posts created under the enhanced graduate teacher ratio. Upon successful re-grading or natural wastage of a serving Principal Assistant Master/Mistress, the practice



of upgrading a Senior Assistant Master/Mistress post to a Principal Assistant Master/Mistress post for a secondary school with 24 or more classes will cease with immediate effect. If a serving Principal Assistant Master/Mistress does not apply for re-grading to Senior Graduate Master/Mistress, he/she can continue to be accommodated in his/her existing rank of Principal Assistant Master/Mistress holding against a Senior Graduate Master/Mistress post created under the graduate teacher ratio accordingly.

#### Primary Schools

Starting from the 2000/01 school year, no non-degree holders should be appointed as new school Principals. Serving Principals at Principal Assistant Master/Mistress rank who are non-degree holders will be accommodated until natural wastage.

#### Special Schools

Starting from the 2008/09 school year, Principal Assistant Masters/Mistresses with a recognised degree plus teacher training (or equivalent) may apply for re-grading to Senior Graduate Masters/Mistresses in his/her serving school to fill up new Senior Graduate Master/Mistress posts created under the enhanced graduate teacher ratio.

- (a) Upon successful re-grading or natural wastage of a serving Principal Assistant Master/Mistress, the practice of upgrading a Senior Assistant Master/Mistress post to a Principal Assistant Master/Mistress post will cease with immediate effect. The respective proportions of Senior Assistant Master/Mistress, Assistant Master/Mistress and Certificated Master/Mistress posts stipulated in this Code of Aid will not be affected by the cessation of this practice.
- (b) If a serving Principal Assistant Master/Mistress does not apply for re-grading to Senior Graduate Master/Mistress, he/she can continue to be accommodated in his/her existing rank of Principal Assistant Master/Mistress holding against a Senior Graduate Master/Mistress post created under the enhanced graduate teacher ratio accordingly.

Exceptions to the arrangement spelt out in (a) above are allowed during the two-year transition period from 1 September 2008 to 31 August 2010. If a Principal Assistant Master/Mistress post is vacated due to natural wastage or other reasons (excluding re-grading to Senior

Graduate Master/Mistress), the school may consider promoting a serving Senior Assistant Master/Mistress to fill the vacancy and a Senior Graduate Master/Mistress post created under the enhanced graduate teacher ratio should be held against accordingly. In case the Principal Assistant Master/Mistress incumbent is re-graded to Senior Graduate Master/Mistress during the transition period, the arrangement in (a) will apply.

*(updated on 1 September 2008)*

Section 4.13**Guide to Appointment****Senior Assistant Master/Mistress (SAM)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Promotion  
Promotion rank for Assistant Masters/Mistresses. Please refer to *Any Other Remarks* below.
- (b) Direct Appointment  
Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.

Type of Work:Secondary Schools

- (a) Class teaching of academic subjects up to Secondary 5 level and/or of cultural/technical/practical subjects up to Secondary 6 level in a secondary school; or  
(*updated on 1 April 2013*)
- (b) Performing duties of special responsibility in addition to class teaching in a secondary school.

Primary Schools

Principal of a primary school with 12 to 23 classes.

Special Schools

Class teaching up to Secondary 5 in the secondary section of a special school or performing duties of special responsibility.

Promotion Prospects: N.A.

Any Other Remarks:Secondary Schools

- (a) Starting from the 2008/09 school year, Principal Assistant Masters/Mistresses with a recognised degree plus teacher training (or equivalent) may apply for re-grading to Senior Graduate Masters/Mistresses in his/her serving school to fill up new Senior Graduate Master/Mistress posts created under the graduate teacher ratio. Upon successful re-grading or natural wastage of a serving Principal Assistant Master/Mistress, the practice of upgrading a Senior Assistant Master/Mistress post to a Principal Assistant Master/Mistress post for a secondary school with 24 or more classes will cease with immediate effect.

- (b) If a Principal Assistant Master/Mistress post is vacated upon natural wastage or other reasons (excluding re-grading to Senior Graduate Master/Mistress) during the two-year transition period from 1 September 2008 to 31 August 2010, the school is allowed to fill the vacancy by promoting a serving Senior Assistant Master/Mistress and a Senior Graduate Master/Mistress post should be held against accordingly. Senior Assistant Master/Mistress will be eligible for consideration for promotion to Principal Assistant Master/Mistress after they have served for at least two years in the post in a government or aided or Direct Subsidy Scheme secondary school or, since 1 September 1990, in a caput or private school or bought-place school bound by contract, and undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

*(updated on 2 January 2014)*

#### Primary Schools

- (a) Starting from the 2000/01 school year, no non-degree holders should be appointed as new school Principals. Serving Principals at SAM rank who are non-degree holders will be accommodated until natural wastage.
- (b) A serving Senior Assistant Master/Mistress with local first degree or equivalent qualifications is allowed to compete with Headmaster/Headmistress II for promotion to the next higher rank in the school or in schools operated by the same sponsoring body.

#### Special Schools

- (a) Starting from the 2008/09 school year, serving Principal Assistant Masters/Mistresses with a recognised degree plus teacher training (or equivalent) may apply for re-grading to Senior Graduate Masters/Mistresses in his/her serving school to fill up new Senior Graduate Master/Mistress posts created under the enhanced graduate teacher ratio. Upon successful re-grading or natural wastage of a serving Principal Assistant Master/Mistress, the practice of upgrading a Senior Assistant Master/Mistress post to a Principal

Assistant Master/Mistress post will cease with immediate effect.

- (b) If a Principal Assistant Master/Mistress post is vacated upon natural wastage or other reasons (excluding re-grading to Senior Graduate Master/Mistress) during the two-year transition period from 1 September 2008 to 31 August 2010, the school is allowed to fill the vacancy by promoting a serving Senior Assistant Master/Mistress and a Senior Graduate Master/Mistress post should be held against accordingly. In case the Principal Assistant Master/Mistress incumbent is re-graded to Senior Graduate Master/Mistress during the transition period, the arrangement in the preceding paragraph will apply. Senior Assistant Master/Mistress will be eligible for consideration for promotion to Principal Assistant Master/Mistress after they have served for at least two years in the post in an aided special school and undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

*(updated on 1 September 2008)*

Section 4.14**Guide to Appointment****Assistant Master/Mistress (AM) – as Senior Teacher**

(For information: This document is not part of any agreement of service.)

- Appointment Requirements:
- (a) Promotion  
Promotion rank for Certificated Masters/Mistresses.
  - (b) Direct Appointment  
Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.
- Type of Work:
- Secondary Schools  
Class teaching up to Secondary 4 level in a secondary school.
- Primary Schools  
Senior Teacher in a primary school with duties in addition to class teaching.
- Special Schools
- (a) Senior Teacher in the primary section of a special school with duties in addition to class teaching; or
  - (b) Class teaching up to Secondary 4 level in the secondary section of a special school.
- Promotion Prospects: Senior Assistant Master/Mistress or Senior Primary School Master/Mistress
- (a) Senior Assistant Master/Mistress  
Assistant Masters/Mistresses will be eligible for consideration for promotion to Senior Assistant Master/Mistress after they have demonstrated their ability to undertake more responsible duties by serving satisfactorily for:
    - Secondary Schools
    - (i) three years regularly teaching an academic subject at Secondary 5 Level in a government or aided or Direct Subsidy Scheme secondary school; or
    - (ii) two years performing duties of special responsibility in a government or aided or Direct Subsidy Scheme secondary school,
    - Special Schools
    - (i) three years regular teaching an academic subject

at Secondary 5 level in an aided special school;  
or

- (ii) two years performing duties of special responsibility in the secondary section of an aided special school;

and have undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

- (b) Senior Primary School Master/Mistress

Primary Schools and Special Schools

An Assistant Master/Mistress with a local first degree or equivalent will be eligible for consideration for promotion to Senior Primary School Master/Mistress after he/she has served successfully for at least 2 years as an Assistant Master/Mistress in a government or aided or Direct Subsidy Scheme primary school (for the post in an aided primary school) / primary special school or the primary section of a special school (for the post in an aided special school) and undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium. *(updated on 1 September 2016)*

*(updated on 2 January 2014)*

Section 4.15**Guide to Appointment****Assistant Master/Mistress (Student Guidance Teacher) (AM(SGT))**

(For information: This document is not part of any agreement of service.)

Appointment  
Requirements:

- (a) Acting  
The Incorporated Management Committee may appoint an Assistant Master/Mistress (Student Guidance Teacher) on acting capacity. Candidates should be experienced qualified primary school teachers who have no less than three years' experience serving in government/aided/Direct Subsidy Scheme primary school(s) and have completed the necessary training. Necessary training refers to the Pre-service Training Course for Student Guidance Teachers conducted by the former Education Department, the former Education and Manpower Bureau or the Education Bureau, or the Certificate Course on Student Guidance for Teachers of Primary Schools conducted by a local tertiary institute or its equivalent. The teacher would have to gain five years' experience, at least two of which as a Student Guidance Teacher, before being promoted.
- (b) Direct Appointment  
The Incorporated Management Committee may appoint a teacher with the necessary experience and training for direct appointment to Assistant Master/Mistress (Student Guidance Teacher). Candidates should be experienced qualified primary school teachers who have no less than five years' experience serving in government/aided/Direct Subsidy Scheme primary school(s), and at least two of which as Student Guidance Teachers. The candidate should also have completed the necessary training when the appointment is offered. Necessary training refers to the Pre-service Training Course for Student Guidance Teachers conducted by the former Education Department, the former Education and Manpower Bureau or the Education Bureau, or the Certificate Course on Student Guidance for Teachers of Primary Schools conducted by a local tertiary institute or its equivalent.



- Type of Work: An Assistant Master/Mistress (Student Guidance Teacher) helps to coordinate the service of a school-based guidance team and to implement the Comprehensive Student Guidance Service including formulating a student guidance policy, promoting the personal growth education, providing responsive service to students and supportive service to parents and teachers.
- Promotion Prospects: Please refer to *Any Other Remarks* below.
- Any Other Remarks:
- (a) A serving Assistant Master/Mistress (Student Guidance Teacher) with a local first degree or equivalent is eligible for consideration for re-grading to Primary School Master/Mistress under school-based entitlement or Primary School Master/Mistress (Student Guidance Teacher) under sponsor-based entitlement.
  - (b) An Assistant Master/Mistress (Student Guidance Teacher) under school-based entitlement with a local first degree or equivalent is eligible for consideration together with other eligible senior teachers in the school for promotion to Senior Primary School Master/Mistress after he/she has served successfully for at least 2 years as an Assistant Master/Mistress in a government or aided or Direct Subsidy Scheme primary school and undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

(updated on 2 January 2014)

Section 4.16**Guide to Appointment****Assistant Master/Mistress (Workshop Teacher) (AM(WT))**

(For information: This document is not part of any agreement of service.)

- Appointment Requirements:
- (a) Promotion  
Promotion rank for Certificated Masters/Mistresses (Workshop Teacher).
  - (b) Direct Appointment  
Candidates should have fulfilled all requirements for normal promotion to this rank. The decision of direct appointment of teachers to promotion rank must be supported by the majority of members of the Incorporated Management Committee and is fully justifiable.
- Type of Work:
- (a) Workshop instruction and workshop management which include ensuring of safety in the workshops, maintenance of tools and equipment, preparation of materials, submission of annual estimates and keeping record of inventory and consumables;
  - (b) Class teaching in a secondary school/special school with secondary classes; and
  - (c) Where necessary, other related duties as considered appropriate.
- Promotion Prospects: N.A.

Section 4.17**Guide to Appointment****Certificated Master/Mistress (CM)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Certificate in Primary/Secondary Education from the Hong Kong Institute of Education/Teacher's Certificate from a College of Education in Hong Kong obtained after a three-year full-time training course or a two-year full-time training course (acquired in or after 1982), or an equivalent qualification; or
  - (b) Technical Teacher's Certificate obtained after a three-year full-time technical teacher training course, or an equivalent qualification; or
  - (c) Higher Diploma/Certificate\*, or equivalent qualification, plus one year's relevant post-qualification working experience; or
  - (d) Diploma\* or equivalent qualification, plus either:
    - (i) one year's relevant post-qualification working experience and one year of full-time (or two years of part-time) technical teacher training; or
    - (ii) 2 years' relevant post-qualification working experience; or
  - (e) Secretarial or commercial certificate\*, or equivalent qualification, plus either:
    - (i) one year's relevant post-qualification working experience and one year of full-time (or two years of part-time) technical teacher training; or
    - (ii) 2 years' relevant post-qualification working experience; or
- \* Obtained from a local university or a technical institute.
- (f) A qualification other than (a) to (e) above, acceptable to the Permanent Secretary.

Type of Work:Secondary Schools

- (a) Class teaching in lower forms of a secondary school, and
- (b) Where necessary, other related duties as considered appropriate.

Primary Schools

- (a) Class teaching in an aided primary school; and
- (b) Other duties as the Principal of the school may require.

Special Schools

- (a) Class teacher in the primary classes or lower secondary classes of a special school; or
- (b) Resource teacher for special programmes; and
- (c) Where necessary, other related duties as considered appropriate.

Promotion Prospects: Assistant Master/Mistress

Certificated Masters/Mistresses possessing an appropriate Teacher's Certificate or an equivalent qualification (and for special schools, who have successfully completed a course of training in special education recognised by the Permanent Secretary) will be eligible for consideration for promotion to Assistant Master/Mistress if they have:

- (a) in a secondary/secondary special school or the secondary section of a special school:
  - (i) five years satisfactory and acceptable experience as a teacher in a government or aided or Direct Subsidy Scheme secondary school or secondary section of a special school or, since 1 January 1966 in an assisted private secondary school or, since 1 September 1990, in a caput or bought-place school bound by contract; or
  - (ii) five years satisfactory and acceptable experience as a teacher in a government or aided or Direct Subsidy Scheme secondary or primary school, or since 1 January 1966, in an assisted private secondary school or, since 1 September 1990, in a caput or bought-place school bound by contract, of which the last two years must be in the nominating aided secondary school/secondary section of the nominating special school; and
- (b) in a primary/primary special school or the primary section of a special school:  
five years satisfactory and acceptable experience as a teacher in a government or aided or Direct Subsidy Scheme primary school;

*(updated on 2 January 2014)*

and have undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

Certificated Masters/Mistresses not possessing teacher training or an equivalent qualification but appointed prior

to 1 January 1991 will be eligible for consideration for promotion to Assistant Master/Mistress provided that they have undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.

Any Other Remarks:

- (a) Untrained Certificated Master/Mistress will not be allowed to proceed beyond the salary bar as specified below without acquiring an acceptable teacher training qualification:
- (i) Bar at MPS point 19 for those appointed between 1 January 1991 and 31 March 2000 (both dates inclusive);
  - (ii) Bar at MPS point 17 for those appointed between 1 April 2000 and 31 July 2007 (both dates inclusive);
  - (iii) Bar at MPS point 19 for those appointed on/after 1 August 2007.

With effect from 1 August 2007, the salary bar would be set at five pay points above the prevailing starting salary and would be adjusted automatically whenever there is a change in the starting salary in the future. A serving untrained Certificated Master/Mistress without a break in service is subject to the adjusted salary bar or the highest salary bar point he/she has ever experienced in the appointment as Certificated Master/Mistress, whichever is the higher.

*(updated on 1 September 2010)*

- (b) Direct entrants who have completed two years of continuous full-time teacher training (acquired prior to 1982) at a College of Education/Hong Kong Technical Teachers' College will enter the scale at the sub-point.
- (c) Direct entrants with the qualifications under Appointment Requirements (d)(i) will enter the scale at the second point.
- (d) Direct entrants with acceptable qualifications under Appointment Requirements (f) will enter at a point, or sub-point, of the scale considered appropriate by the Permanent Secretary.
- (e) Direct entrants having approved teaching/relevant practical experience in excess of that required for appointment may be awarded increments in the basic scale at the discretion of the Permanent Secretary.

- (f) Serving Certificated Masters/Mistresses who are appointed under Appointment Requirements (c), (d)(ii) or (e)(ii) and who have successfully undertaken a two-year part-time technical teacher training course at the Hong Kong Institute of Education or a Technical Institute may be awarded an additional increment if they are not already at the top of the basic scale.
- (g) Serving Certificated Masters/Mistresses who are appointed under Appointment Requirements (f) at a sub-point of the scale without teacher training and who have successfully undertaken an appropriate In-service Course of Teacher Training or Post-Graduate Certificate in Education may be awarded an additional increment if they are not already at the top of the basic scale.
- (h) Appointment of Certificated Master/Mistress with qualifications acquired through the Non-graduate Teacher Qualifications Assessment (NGTQA)
  - (i) For appointment as Certificated Master/Mistress in an aided primary school/primary special school/primary section of a special school, a holder of the following qualifications acquired through the NGTQA is regarded as having a non-standard qualification acceptable to the Permanent Secretary:
    - Type 1 – An Assessment Certificate (Primary Level) issued by the former Education Department certifying the holder having passed Part I and Part II of the NGTQA; or
    - Type 2 – An Assessment Certificate (Primary Level) issued by the former Education Department certifying the holder having passed Part I, Part II and Part III of the NGTQA.

*(updated on 2 January 2014)*
  - (ii) Direct entrants with the above non-standard qualifications will enter at MPS point 12 if appointed before 1 April 2000 or after 31 July 2007. For those appointed between 1 April 2000 and 31 July 2007 (both dates inclusive), the MPS point is 10.
  - (iii) Holders of the above non-standard qualifications appointed under Type 1 will be allowed to proceed the salary bar specified in (a) above after having successfully completed the

In-service Course of Teacher Training. No additional increment will be awarded for the successful completion of the In-service Course of Teacher Training.

- (iv) Holders of the above non-standard qualification appointed under Type 2 will be allowed to proceed the salary bar specified in (a) above and be awarded an additional increment after having successfully completed a period of supervised teaching for at least one year in a primary school or a primary special school. No additional increment will be awarded to such teachers for subsequent completion of an In-service Course of Teacher Training.
- (v) Certificated Masters/Mistresses with the above status of qualified teacher awarded after passing the NGTQA and successful completion of In-service Course of Training for Teachers in Primary Schools or a period of supervised teaching for at least one year (and for special schools, who have successfully completed a course of training in special education recognised by the Permanent Secretary) will be eligible for consideration for promotion to Assistant Master/Mistress in primary/primary special school/primary section of a special school if they have five years satisfactory and acceptable experience as a teacher in a government or aided or Direct Subsidy Scheme primary school and have undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium.  
*(updated on 2 January 2014)*
- (i) With effect from 1 September 2006, untrained teachers with specified non-standard qualifications (such as Approved Post-secondary Secondary College diplomas) will not be accepted for new appointment or re-appointment as Certificated Master/Mistress after a break in service [unless for subjects in demand (e.g. technical / practical / vocational subjects). Priority should still be given to teachers with standard qualifications.]

*(updated on 1 September 2008)*

Section 4.18**Guide to Appointment****Certificated Master/Mistress (Workshop Teacher) (CM(WT))**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

- (a) Technical Teacher's Certificate obtained after a three-year full-time technical teacher training course, or an equivalent qualification; or
- (b) Higher Diploma/Certificate\*, or equivalent qualification, plus one year's relevant practical post-qualification experience; or
- (c) Ordinary/Technician Diploma\* or equivalent qualification, plus either:
  - (i) One year's relevant post-qualification practical experience and one year of full-time technical teacher training, or
  - (ii) 2 years' relevant post-qualification practical experience; or
- (d) Secretary or commercial certificate\*, or equivalent qualification, plus either:
  - (i) one year's relevant post-qualification practical experience and one year of full-time technical teacher training; or
  - (ii) 2 years' relevant post-qualification practical experience.
- (e) A qualification other than (a) to (d) above, acceptable to the Permanent Secretary.

\* Obtained from a local university or a technical institute.

Type of Work:

- (a) Workshop instruction and workshop management which include ensuring of safety in the workshop, maintenance of tools and equipment, preparation of materials, submission of annual estimates and keeping record of inventory and consumables;
- (b) Class teaching in a secondary school/special school with secondary classes;
- (c) Where necessary, other related duties as considered appropriate.

Promotion Prospects:

Assistant Master/Mistress (Workshop Teacher)  
 There is provision of one Assistant Master/Mistress (Workshop Teacher) post for every four workshops. Certificated Masters/Mistresses (Workshop Teacher) will be eligible for consideration for promotion to Assistant Master/Mistress (Workshop Teacher) if they have five years satisfactory and acceptable experience as a Certificated Master/Mistress (Workshop Teacher) or Workshop Instructor appointed before 1 September 1993



in a government or aided or Direct Subsidy Scheme secondary school/special school with secondary classes of which the last two years must be in the nominating government or aided or Direct Subsidy Scheme secondary/special schools and have undertaken training course(s) specified by the Permanent Secretary or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Section 5 of this Compendium and, in the case of special schools, have undertaken a course of training in special education recognised by the Permanent Secretary.

*(updated on 2 January 2014)*

Any Other Remarks:

- (a) Untrained Certificated Master/Mistress (Workshop Teacher) will not be allowed to proceed beyond the salary bar as specified below without acquiring an acceptable teacher training qualification:
- (i) Bar at MPS point 19 for those appointed between 1 January 1991 and 31 March 2000 (both dates inclusive);
  - (ii) Bar at MPS point 17 for those appointed between 1 April 2000 and 31 July 2007 (both dates inclusive);
  - (iii) Bar at MPS point 19 for those appointed on/after 1 August 2007.

With effect from 1 August 2007, the salary bar would be set at five pay points above the prevailing starting salary and would be adjusted automatically whenever there is a change in the starting salary in the future. A serving untrained Certificated Master/Mistress (Workshop Teacher) without a break in service is subject to the adjusted salary bar or the highest salary bar point he/she has ever experienced in the appointment as Certificated Master/Mistress (Workshop Teacher), whichever is the higher.

*(updated on 1 September 2010)*

- (b) Direct entrants who have completed two years of continuous full-time teacher training (acquired prior to 1982) at the Hong Kong Technical Teachers' College will enter the scale at the sub-point.
- (c) Direct entrants with the qualifications at Appointment Requirement (c)(i) will enter the scale at the second point.
- (d) Direct entrants with acceptable qualifications under Appointment Requirement (e) will be appointed to the point, or sub-point, of the scale considered

- appropriate by the Permanent Secretary.
- (e) Direct entrants having approved relevant teaching/practical experience in excess of that required for appointment may be awarded increments in the basic scale at the discretion of the Permanent Secretary.
  - (f) With effect from 1 September 2006, untrained teachers with specified non-standard qualifications (such as Approved Post-secondary Secondary College diplomas) will not be accepted for new appointment or re-appointment as Certificated Master/Mistress after a break in service [unless for subjects in demand (e.g. technical / practical / vocational subjects). Priority should still be given to teachers with standard qualifications.]

*(updated on 1 September 2008)*

Section 4.19**Guide to Appointment****Teacher Assisting in Speech Therapy (TAST)**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment as TASTs in schools for children with hearing impairment, candidates must:

- (a) meet the qualifications for appointment as a Certificated Master/Mistress;
- (b) be assessed to have normal hearing and be free from speech impediments; and
- (c) be fluent in Cantonese.

*(updated on 2 February 2015)*

**Type of Work:**

- (a) to provide informal assessment and individual and group therapy as prescribed by a speech therapist to school children with articulation defects and retarded speech and language development;
- (b) to work in close co-operation with speech therapists and classroom teachers on speech/language treatment programmes; and
- (c) to perform such other duties as may be required.

Section 4.20**Guide to Appointment****Mobility Instructor**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment as Mobility Instructors, candidates must

- (a) meet the qualifications for appointment as a Certificated Master/Mistress;
- (b) be fluent in Cantonese; and
- (c) have completed or be prepared to undergo a training course for mobility instructors recognised by the Permanent Secretary.

**Type of Work:**

- (a) to provide training in orientation and mobility instruction to students with visual impairment; and
- (b) to perform such other duties as may be required.

Section 4.21**Guide to Appointment****Resource Teacher**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

To be eligible for appointment as resource teachers in special schools, candidates must meet the following qualifications for appointment:

For children with visual impairment

Certificated Master/Mistress for teaching students with visual impairment who register with a school for the visually impaired for resource support but attend special schools or primary classes of ordinary schools.

Graduate Master/Mistress for teaching secondary students with visual impairment who register with a school for the visually impaired for resource support but attend ordinary schools.

For autistic children

Certificated Master/Mistress for teaching children with autistic disorder in the primary section of a special school for children with mild and/or moderate intellectual disability.

For supportive remedial service

Certificated Master/Mistress for the primary section of a special school for children with hearing impairment who are attending ordinary primary schools.

Graduate Master/Mistress for the secondary section of a special school for children with hearing impairment who are at junior secondary level in ordinary schools.

Type of Work:

(a) For children with visual impairment  
to provide remedial teaching and resource support to the visually-impaired studying in ordinary schools and special schools other than those for the visually impaired; and

For autistic children *(updated on 2 February 2015)*

to provide remedial support to autistic children assessed to have such a need in special schools for the mildly and/or schools for children with moderate intellectual disability; and

For supportive remedial service

to provide remedial support to children with hearing impairment admitted in ordinary schools; and

(b) to perform such other duties as may be required.

Section 4.22**Guide to Appointment****Low-vision Training Teacher**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment as low-vision training teachers, candidates must:

- (a) meet the qualifications for appointment as a Certificated Master/Mistress;
- (b) be fluent in Cantonese; and
- (c) have completed or be prepared to undergo a training course on low-vision.

**Type of Work:**

- (a) to provide low-vision training for children with visual impairment; and
- (b) to perform such other duties as may be required.

Section 4.23**Guide to Appointment****Laboratory Technician I, II and III (LT I, II, III)**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:****Laboratory Technician I**

This is a promotion post for Laboratory Technician II. Such posts will only be established, however, in secondary special schools with five or more laboratories or in a school for the children with hearing impairment with more than 17 classes, and at the discretion of the Permanent Secretary. *(updated on 2 February 2015)*

**Laboratory Technician II**

This is a promotion post for Laboratory Technician III.

**Direct Appointment of Laboratory Technician II**

Should there be a vacancy, it is permissible for the school to offer direct appointment of Laboratory Technician II to the appropriate applicant who is serving / has served as Laboratory Technician II in a government secondary school or in another aided school even under a different sponsor. In the case of laboratory technicians for the maintenance of audiological equipment in schools for the hearing impaired, candidates with the appropriate training and three years of relevant experience may also be considered for direct appointment as Laboratory Technician II.

*(updated on 1 September 2016)*

**Laboratory Technician III**

To be eligible for appointment to the post of Laboratory Technician III, a candidate must have:

- (a) Level 2 or above attained in five subjects, including English Language and two science education subjects (i.e. Physics, Chemistry, Biology or Combined Science) in the Hong Kong Diploma of Secondary Education Examination (HKDSEE), or equivalent; or
- (b) Level 2<sup>Note</sup> / Grade E or above attained in five subjects, including English Language and two science subjects (e.g. Physics, Chemistry or Biology) in the Hong Kong Certificate of Education Examination (HKCEE), or equivalent.

Note: For the purpose of appointment of Laboratory Technicians in aided schools, 'Grade C' and 'Grade E' in Chinese Language and English Language (Syllabus B) in

the HKCEE before 2007 are accepted administratively as comparable to ‘Level 3’ and ‘Level 2’ respectively in Chinese Language and English Language in the 2007 HKCEE and henceforth.

*(updated on 1 April 2013)*

Type of Work:

- (a) To take charge of the operation and maintenance of the laboratories and assist teachers in performing experiments in class;
- (b) Where necessary, other related duties as considered appropriate.

Promotion Prospects:

Laboratory Technician I

Laboratory Technicians II will be eligible for consideration for promotion to Laboratory Technician I provided that they have at least five years of satisfactory service as Laboratory Technicians II.

Laboratory Technician II

Laboratory Technicians III will be eligible for consideration for promotion to Laboratory Technician II on having:

- (a) (i) Secondary Schools  
completed three years' continuous and satisfactory service in a laboratory technician post in a government or aided secondary school or, since 1 September 1990, in a caput or assisted private school or a bought-place school bound by contract, of which the last six months must be in the nominating aided secondary school;
- (ii) Special Schools  
been confirmed to the permanent establishment and completed 3 years' satisfactory service;
- (b) served for one year on the 3rd point of the salary scale;
- (c) obtained an approved Laboratory Technician Certificate or equivalent; and
- (d) obtained a valid and approved First Aid Certificate, if the Certificate in (c) above does not contain first aid training as one of its course components.

Any Other Remarks:

- (a) The probationary period of a laboratory technician should normally be two years or on completion of an approved Laboratory Technician Certificate Course or an appropriate course of training, whichever is the longer.



- (b) The appointment of a laboratory technician may be terminable by the Incorporated Management Committee or the laboratory technician by giving one month's notice in writing if the laboratory technician is serving a period of probation or three months' notice in writing if the laboratory technician has satisfactorily completed a probationary period.
- (c) Relevant laboratory technician experience in the universities and polytechnics, and in a caput or an assisted private or a bought-place school bound by contract since 1 September 1990, shall be accepted as recognised experience for incremental purpose in aided schools.
- (d) The laboratory technician who has been recommended to attend an approved Laboratory Technician Certificate Course or an approved appropriate course of training is required to sign an undertaking with the school by which he agrees to serve in the school for at least one year after completion of the course.

*(updated on 1 September 2008)*

Section 4.24**Guide to Appointment****Educational Psychologist I (EP I)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:

Candidates should have:

- (a) a first degree in Psychology from a local university or equivalent;
- (b) a Master's Degree in Educational Psychology (Professional Practice) from a local university or equivalent;
- (c) a Post Graduate Certificate in Education from a local university or equivalent;
- (d) obtained full membership of the Division of Educational Psychology of the Hong Kong Psychological Society or an equivalent status in an internationally recognised professional organization of Educational Psychology (applicable to those appointed on or after 1 September 2012);
- (e) a minimum of 6 years' relevant post-degree experience of which at least 3 years should be as an Educational Psychologist;
- (f) good command of Cantonese and written Chinese; and
- (g) good command of spoken and written English.

Type of Work:

Educational Psychologists provide comprehensive services to schools at the following target levels:

- (a) Student support level
  - To provide assessment, counseling and guidance services for students;
  - To provide intervention or behavioural guidance programmes for students directly and/or in collaboration with school personnel such as teachers, school social workers and/or speech therapists, etc.; and
  - To promote home-school co-operation in child management and deliver parent training programmes in collaboration with school personnel.
- (b) Teacher support level
  - To support teachers in the early identification of at risk students as well as the planning and implementation of appropriate intervention measures for them;

- To advise teachers on measures to enhance learning and teaching effectiveness as well as behaviour support, including the formulation of individual education plans for the students;
  - To advise teachers and school social workers in planning and implementing school-based psycho-educational programmes for students;
  - To support teachers in school-based action research related to the domains of student support as well as learning and teaching; and
  - To conduct staff development training to equip school personnel with the necessary professional knowledge and skills to meet the personal, social and special educational needs of students.
- (c) School system level
- To support schools in developing whole-school policies to cater for student diversity;
  - To support schools in developing effective mechanism to meet the diverse educational needs of their students; and
  - To support schools in developing policy and mechanism on crisis management and to render crisis management service to schools whenever necessary.

Educational Psychologist I also leads the planning, execution, management and evaluation of the Educational Psychology Service as well as provides support to Educational Psychologist II, where appropriate.

Promotion Prospects: N.A.

- Any Other Remarks:
- (a) Holders of degrees other than those from a local university or equivalent may apply, but should attach copies of transcripts of studies to their applications.
  - (b) The candidate must be eligible for graduate membership of the Hong Kong Psychological Society or the British Psychological Society or equivalent. The Master's Degree in Educational Psychology (Professional Practice) obtained must be one which can prepare the candidate for independent professional work as an educational psychologist.
  - (c) The requirement for a candidate to obtain full membership of the Division of Educational Psychology of the Hong Kong Psychological

Society or an equivalent status in an internationally recognised professional organization of Educational Psychology in paragraph (d) under “Appointment Requirements” is also applicable to the existing educational psychologist incumbents who take up a new appointment in another school as Educational Psychologist I on or after 1 September 2012.

*(updated on 24 May 2012)*

Section 4.25**Guide to Appointment****Educational Psychologist II (EP II)**

(For information: This document is not part of any agreement of service.)

<u>Appointment Requirements:</u>	<p>Candidates should have:</p> <p>(a) a first degree in Psychology from a local university or equivalent;</p> <p>(b) a Master’s Degree in Educational Psychology (Professional Practice) from a local university or equivalent;</p> <p>(c) obtained full membership of the Division of Educational Psychology of the Hong Kong Psychological Society or an equivalent status in an internationally recognised professional organization of Educational Psychology or been eligible for such membership. Candidates so eligible shall obtain such full membership within nine months after appointment<sup>10</sup>. (This requirement is applicable to those appointed as Educational Psychologist II on or after 1 September 2012 and the existing educational psychologist incumbents who take up a new appointment in another school as Educational Psychologist II on or after 1 September 2012);</p> <p>(d) good command of Cantonese and written Chinese; and</p> <p>(e) good command of spoken and written English.</p>
<u>Type of Work:</u>	<p>Educational Psychologists provide comprehensive services to schools at the following target levels:</p> <p>(a) Student support level</p> <ul style="list-style-type: none"> <li>• To provide assessment, counseling and guidance services for students;</li> <li>• To provide intervention or behavioural guidance programmes for students directly and/or in collaboration with school personnel such as teachers, school social workers and/or speech therapists, etc.; and</li> <li>• To promote home-school co-operation in child management and deliver parent training programmes in collaboration with school personnel.</li> </ul>

<sup>10</sup> Schools should add a clause in the employment contracts for new appointees that if the appointees cannot obtain the above required full membership within nine months after the appointment, their contracts will be terminated.

- (b) Teacher support level
- To support teachers in the early identification of at risk students as well as the planning and implementation of appropriate intervention measures for them;
  - To advise teachers on measures to enhance learning and teaching effectiveness as well as behaviour support, including the formulation of individual education plans for the students;
  - To advise teachers and school social workers in planning and implementing school-based psycho-educational programmes for students;
  - To support teachers in school-based action research related to the domains of student support as well as learning and teaching; and
  - To conduct staff development training to equip school personnel with the necessary professional knowledge and skills to meet the personal, social and special educational needs of students.
- (c) School system level
- To support schools in developing whole-school policies to cater for student diversity;
  - To support schools in developing effective mechanism to meet the diverse educational needs of their students; and
  - To support schools in developing policy and mechanism on crisis management and to render crisis management service to schools whenever necessary.

Promotion Prospects: Educational Psychologist I

Educational Psychologists II will be eligible for consideration for promotion to Educational Psychologist I on having:

- (a) obtained a Post Graduate Certificate in Education from a local university or equivalent; and
- (b) obtained 6 years' relevant post-degree experience of which at least 3 years should be as an Educational Psychologist II; and
- (c) obtained full membership of the Division of Educational Psychology of the Hong Kong Psychological Society or an equivalent status in an

- internationally recognised professional organization of Educational Psychology; and
- (d) satisfactory service as Educational Psychologist II. School should take into account the work performance, professional expertise, and other personal attributes, such as leadership, commitment, interpersonal skills, judgment, planning and organization abilities, etc. of the candidate when considering promotion.  
*(Updated on 24 May 2013)*

Any Other Remarks:

- (a) Holders of degrees other than those from a local university or equivalent may apply, but should attach copies of transcripts of studies to their applications.
- (b) The candidate must be eligible for graduate membership of the Hong Kong Psychological Society or the British Psychological Society or equivalent. The Master's Degree in Educational Psychology (Professional Practice) obtained must be one which can prepare the candidate for independent professional work as an educational psychologist.

*(updated on 24 May 2012)*

Section 4.26**Guide to Appointment****Speech Therapist (ST)**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of Speech Therapist, a candidate must:

- (a) have a degree in Speech and Hearing Sciences from a local university, or equivalent;
- (b) have English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note]; and
- (c) be able to write fluent English and Chinese, and can speak fluent English and Cantonese.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.



Section 4.27**Guide to Appointment****Senior Physiotherapist (SPT), Physiotherapist I and II (PT I, II)**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:Senior Physiotherapist

Promotion rank for Physiotherapist I.

Physiotherapist I

Promotion rank for Physiotherapist II.

Physiotherapist II

To be eligible for appointment to the grade of Physiotherapist II, a candidate must:

- (a) (i) have a professional Degree/Diploma in Physiotherapy issued by the Hong Kong Polytechnic/Polytechnic University, or equivalent; or
- (ii) have a Certificate of Registration (Part Ia or Ib) and a valid Practising Certificate issued by the Physiotherapists Board, Hong Kong;
- (b) have English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note]; and
- (c) speak fluent Cantonese.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.

Promotion Prospects:Senior Physiotherapist

Physiotherapists I will be eligible for consideration for promotion to Senior Physiotherapist, if they have at least 5 years of satisfactory service as Physiotherapists I.

Physiotherapist I

Physiotherapists II will be eligible for consideration for promotion to Physiotherapist I, if they have at least two years of satisfactory service as Physiotherapists II.

Section 4.28**Guide to Appointment****Senior Occupational Therapist (SOT),  
Occupational Therapist I and II (OT I, II)**

(For information: This document is not part of any agreement of service.)

<u>Appointment Requirements:</u>	<p><u>Senior Occupational Therapist</u> Promotion rank for Occupational Therapist I.</p> <p><u>Occupational Therapist I</u> Promotion rank for Occupational Therapist II.</p> <p><u>Occupational Therapist II</u> To be eligible for appointment to the grade of Occupational Therapist II, a candidate must:</p> <p>(a) (i) have a professional Degree/Diploma in Occupational Therapy issued by the Hong Kong Polytechnic/ Polytechnic University, or equivalent;</p> <p>(ii) be registered in Hong Kong in Part I or II of the Register of Occupational Therapists under the Register of the Supplementary Medical professions Ordinance Chapter 359;</p> <p>(iii) have a valid Practising Certificate issued by the Occupational Therapists Board;</p> <p>(b) have English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note]; and</p> <p>(c) speak fluent Cantonese.</p> <p><u>Note:</u> The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.</p>
<u>Promotion Prospects:</u>	<p>Senior Occupational Therapist</p> <p>Occupational Therapists I will be eligible for consideration for promotion to Senior Occupational Therapist, if they have at least 3 years of satisfactory service as Occupational Therapists I.</p> <p>Occupational Therapist I</p> <p>Occupational Therapists II will be eligible for consideration for promotion to Occupational Therapist I, if they have at least two years of satisfactory service as Occupational Therapists II.</p>

Section 4.29**Guide to Appointment****Occupational Therapy Assistant (OTA)**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of Occupational Therapy Assistant; a candidate must:

- (a) have completed an apprenticeship or a course of study in an appropriate trade, or be able to furnish evidence that he has had at least 5 years' experience in an area of work acceptable to the Permanent Secretary, e.g.
  - (i) Carpentry  
General techniques, with knowledge of cabinet-making;
  - (ii) General  
Skills or activities which may be applied as treatment media, with knowledge of handicrafts;
  - (iii) Metal Work  
General techniques, with knowledge of electrical welding and use of bench latches;
  - (iv) Rattan-work  
With knowledge of light and heavy rattan-work, including furniture making;
- (b) preferably have teaching experience in the appropriate field; and
- (c) be able to speak fluent Cantonese and write Chinese.

Section 4.30**Guide to Appointment****Special School Social Worker**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of special school social worker ranked at the Assistant Social Work Officer/Senior Social Work Assistant level, a candidate must have:

- (a) registered under the Social Workers Registration Ordinance, Chapter 505;
- (b) English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note];
- (c) the ability to speak fluent Cantonese; and

**For Assistant Social Work Officer (ASWO)**

- (d) (i) a local degree in Social Science majoring in Social Work, or equivalent; or
- (ii) a local degree, or equivalent, and has successfully completed a one-year post-graduate course in Social Work at an approved institution; or
- (iii) a local degree, or equivalent, and has successfully completed an approved two-year post-graduate course in social study/social work; or
- (iv) a local degree, or equivalent, and a Master's Degree in Social Work obtained at an approved institution.

**For Senior Social Work Assistant (SSWA)**

- (e) (i) a Diploma in Social Work awarded by the Hong Kong Polytechnic/Polytechnic University, or equivalent; or
- (ii) a Certificate in Social Work awarded by the Academic Board of the Institute for Social Work Training, Hong Kong; or
- (iii) a Diploma in Social Work awarded by a recognised post-secondary college issued after the date of its registration, or equivalent;
- (f) five years' recognised post-qualification experience in social work.

**Note:** The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required

duties, appointment can be offered.

Section 4.31**Guide to Appointment****Warden**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of Warden ranked at the Social Work Officer/Assistant Social Work Officer/Chief Social Work Assistant/Senior Social Work Assistant level, a candidate must have:

- (a) registered under the Social Workers Registration Ordinance, Chapter 505;
- (b) English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note];
- (c) the ability to speak fluent Cantonese; and

**For Social Work Officer (SWO)**

- (d) at least five years' experience at the ASWO rank.
- (e) three years' recognised post-qualification experience in residential care (applicable to warden in secondary schools).

**For Assistant Social Work Officer (ASWO)**

- (f) (i) a local degree in Social Science majoring in Social Work, or equivalent; or
- (ii) a local degree, or equivalent, and has successfully completed a one-year post-graduate course in Social Work at an approved institution; or
- (iii) a local degree, or equivalent, and has successfully completed an approved two-year post-graduate course in social study/social work; or
- (iv) a local degree, or equivalent, and a Master's Degree in Social Work obtained at an approved institution;
- (g) three years' experience in residential care (applicable to warden in special schools).

**For Chief Social Work Assistant (CSWA)**

- (h) a recognised social work diploma or certificate in social work;
- (i) at least five years' experience at the SSWA rank.

**For Senior Social Work Assistant (SSWA)**

- (j) (i) a Diploma in Social Work awarded by the Hong Kong Polytechnic/Polytechnic University, or equivalent; or

- (ii) a Certificate in Social Work awarded by the Academic Board of the Institute for Social Work Training, Hong Kong; or
- (iii) a Diploma in Social Work awarded by a recognised post-secondary college issued after the date of its registration, or equivalent;
- (k) five years' recognised post-qualification experience in social work.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.

Section 4.32**Guide to Appointment****Assistant Warden**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of Assistant Warden ranked at the Assistant Social Work Officer/Senior Social Work Assistant/Social Work Assistant level, a candidate must have:

- (a) registered under the Social Workers Registration Ordinance, Chapter 505;
- (b) English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note];
- (c) the ability to speak fluent Cantonese; and

**For Assistant Social Work Officer (ASWO)**

- (d) (i) a local degree in Social Science majoring in Social Work, or equivalent; or
- (ii) a local degree, or equivalent, and has successfully completed a one-year post-graduate course in Social Work at an approved institution; or
- (iii) a local degree, or equivalent, and has successfully completed an approved two-year post-graduate course in social study/social work; or
- (iv) a local degree, or equivalent, and a Master's Degree in Social Work obtained at an approved institution;

**For Senior Social Work Assistant (SSWA)**

- (e) (i) a Diploma in Social Work awarded by the Hong Kong Polytechnic/Polytechnic University, or equivalent; or
- (ii) a Certificate in Social Work awarded by the Academic Board of the Institute for Social Work Training, Hong Kong; or
- (iii) a Diploma in Social Work awarded by a recognised post-secondary college issued after the date of its registration, or equivalent;
- (f) five years' recognised post-qualification experience in social work.

**For Social Work Assistant level (SWA)**

- (g) (i) a Diploma in Social Work awarded by the Hong Kong Polytechnic/Polytechnic



- University; or equivalent; or
- (iv) a Certificate in Social Work awarded by the Academic Board of the Institute for Social Work Training, Hong Kong; or
  - (iii) a Diploma in Social Work awarded by a registered post-secondary college issued after the date of its registration, or equivalent.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.

Promotion Prospects: Warden

Secondary Schools

Assistant Wardens at the Assistant Social Work Officer level for boarding sections with a capacity of 120 or more boarders may be considered for promotion to Warden at the Social Work Officer level if they have three years' recognised post-qualification experience.

Assistant Wardens at the Senior Social Work Assistant level for boarding sections with 60 – 120 boarders may be considered for promotion to Warden at the Chief Social Work Assistant level if they have five years' recognised post-qualification experience.

Special Schools

Assistant Wardens at the Senior Social Work Assistant level for a boarding section with a capacity of 50 boarders and above may be considered for promotion to Warden at the Chief Social Work Assistant level if they have at least five years' experience at the Senior Social Work Assistant rank.

Assistant Wardens at the Social Work Assistant level for a boarding section with a capacity of less than 50 boarders may be considered for promotion to Warden at the Senior Social Work Assistant level if they have five years' recognised post-qualification experience in social work.

Section 4.33**Guide to Appointment****Boarding Service Master/Mistress I, II**

(For information: This document is not part of any agreement of service.)

Appointment Requirements:Boarding Service Master/Mistress I

To be eligible for appointment to the grade of Boarding Service Master/Mistress I ranked at the Social Work Assistant level, a candidate must have:

- (a) registered under the Social Workers Registration Ordinance, Chapter 505;
- (b) English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note];
- (d) the ability to speak fluent Cantonese; and
- (d) (i) a Diploma in Social Work awarded by the Hong Kong Polytechnic/Polytechnic University; or equivalent; or
- (ii) a Certificate in Social Work awarded by the Academic Board of the Institute for Social Work Training, Hong Kong; or
- (iii) a Diploma in Social Work awarded by a registered post-secondary college issued after the date of its registration, or equivalent.

Boarding Service Master/Mistress II

To be eligible for appointment to the grade of Boarding Service Master/Mistress II ranked at the Welfare Worker level, a candidate must:

- (e) be at least 21 years of age;
- (f) have five subjects including English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note]; and
- (g) be able to write Chinese and speak fluent Cantonese.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.

Promotion Prospects:

Assistant Warden

Boarding Service Masters/Mistresses I with five years' recognised post-qualification experience may be considered for promotion to Assistant Warden at the Senior Social Work Assistant level for boarding sections with a capacity of 60 – 120 boarders. For boarding

sections with a capacity of less than 60 boarders, one of the Boarding Service Masters/Mistresses I may, with the approval of the Permanent Secretary, be assigned as Assistant Warden at the Social Work Assistant level and be granted a responsibility allowance equivalent to two additional increments above the substantive pay of the Assistant Warden on the Social Work Assistant scale.

Section 4.34**Guide to Appointment****Registered Nurse (RN)**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of School Nurse (Registered Nurse), a candidate must:

- (a) have the Certificate of Registration (Part I) issued by the Nursing Council of Hong Kong or equivalent;
- (b) have a valid Practising Certificate issued by the Nursing Council of Hong Kong;
- (c) have English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note]; and
- (d) be fluent in Cantonese.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.

Section 4.35**Guide to Appointment****Enrolled Nurse (EN)**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of School Nurse (Enrolled Nurse), a candidate must:

- (a) have the Certificate of Enrolment (Part I) issued by the Nursing Council of Hong Kong or equivalent; and
- (b) have a valid Practising Certificate issued by the Nursing Council of Hong Kong;
- (c) have a knowledge of both Chinese language and English language at Secondary 4 level; and
- (d) be fluent in Cantonese.

Section 4.36**Guide to Appointment****Braille Staff**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of Braille Staff, a candidate must:

- (a) have 5 subjects, including Chinese Language, English Language (Syllabus B) and Mathematics at Grade E or above in the Hong Kong Certificate of Education Examination; and
- (b) have completed an appropriate course of training in braille.

Section 4.37**Guide to Appointment****Houseparent-in-charge**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of Houseparent-in-charge, a candidate must have:

- (a) registered under the Social Workers Registration Ordinance, Chapter 505;
- (b)
  - (i) a Diploma in Social Work awarded by the Hong Kong Polytechnic/Polytechnic University; or equivalent; or
  - (ii) a Certificate in Social Work awarded by the Academic Board of the Institute for Social Work Training, Hong Kong; or
  - (iii) a Diploma in Social Work awarded by a registered post-secondary college issued after the date of its registration, or equivalent;
- (c) English Language (Syllabus B) and Chinese Language at Grade E or above in Hong Kong Certificate of Education Examination, or equivalent [Note]; and
- (d) the ability to speak fluent Cantonese.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.

Section 4.38**Guide to Appointment****Houseparent/Programme Worker**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of Houseparent/Programme Worker (ranked at the Social Work Assistant level), a candidate must have:

- (a) registered under the Social Workers Registration Ordinance, Chapter 505;
- (b)
  - (i) a Diploma in Social Work awarded by the Hong Kong Polytechnic/Polytechnic University; or equivalent; or
  - (ii) a Certificate in Social Work awarded by the Academic Board of the Institute for Social Work Training, Hong Kong; or
  - (iii) a Diploma in Social Work awarded by a registered post-secondary college issued after the date of its registration, or equivalent;
- (c) English Language (Syllabus B) and Chinese Language at Grade E or above in the Hong Kong Certificate of Education Examination, or equivalent [Note]; and
- (d) the ability to speak fluent Cantonese.

Note: The school may conduct the language proficiency test for those suitable candidates who do not possess the language qualifications. Provided that the school is satisfied with the candidates' language ability for carrying out the required duties, appointment can be offered.

**Promotion Prospects:**

Houseparents and Programme Workers with five years' recognised post-qualification experience may be considered for promotion to Assistant Warden at the Senior Social Work Assistant level for boarding sections with a capacity of 50 or more boarders. For boarding sections with a capacity of less than 50 boarders, one of the Houseparents or Programme Workers may be assigned as Assistant Warden at the Social Work Assistant level and be granted a responsibility allowance equivalent to the two additional increments above the substantive pay of the Assistant Warden on the Social Work Assistant scale.



Section 4.39**Guide to Appointment****Assistant Clerical Officer (ACO)**

(For information: This document is not part of any agreement of service.)

**Appointment Requirements:**

To be eligible for appointment to the grade of Assistant Clerical Officer paid out of the Salaries Grant, a candidate must have either:

- (a) Either 5 subjects, including English Language at ‘Level 2’ or above in the Hong Kong Diploma of Secondary Education Examination or 4 subjects, including English Language, one of which must be at ‘Level 2’ or above and the others at ‘Level 3’ or above or equivalent; or  
*(updated on 1 April 2013)*
- (b) 5 subjects, including English Language (Syllabus B) at Grade E or above in the Hong Kong Certificate of Education Examination or 4 subjects, including English Language (Syllabus B), one of which must be at Grade E or above and the others at Grade C or above; or
- (c) a Grade C or above in English Language (Syllabus A) in the Hong Kong Certificate of Education Examination, together with either 4 other subjects at Grade E or above or 3 other subjects at Grade C or above or equivalent; or
- (d) 5 subjects, including English, at Grade E or above in the Hong Kong Certificate of Education Examination (English) or 4 subjects, including English, one of which must be at Grade E or above and the other at Grade C or above (awarded before 1974); or
- (e) a Grade C or above in English in the Hong Kong Certificate of Education Examination (Chinese) together with either 4 other subjects at Grade E or above or 3 other subjects at Grade C or above (awarded before 1974); or
- (f) a Hong Kong English School Certificate (awarded before 1968) with a pass in English; or
- (g) a Hong Kong Chinese School Certificate (awarded before 1968) with a credit in English.

Note: For the purpose of appointment of clerical staff in aided schools, ‘Grade C’ and ‘Grade E’ in Chinese Language and English Language (Syllabus B) in previous HKCEE are accepted administratively as comparable to ‘Level 3’ and ‘Level 2’ respectively in Chinese Language and English Language in the HKCEE 2007 and after.

*(updated on 1 September 2009)*

Section 4.40**Guide to Appointment****Clerical Assistant (CA)**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of Clerical Assistant paid out of the Salaries Grant, a candidate must:

- (a) have completed Secondary 4 (all subjects) in a registered school; and
- (b) be fluent in Cantonese and have a good working knowledge of English.

Section 4.41**Guide to Appointment****Artisan II**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of Artisan II, a candidate must:

- (a) have knowledge and ability to work as a physiotherapy attendant; and
- (b) be fluent in Cantonese and be able to write Chinese and have some knowledge of English.

Section 4.42**Guide to Appointment****Special Driver**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of Special Driver, a candidate must:

- (a) have an appropriate valid driving licence to drive a registered school bus with 30 or more seats; and
- (b) have acceptable driving experience, preferably not less than 5 years.

Section 4.43**Guide to Appointment****Motor Driver**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of Motor Driver, a candidate must:

- (a) have an appropriate valid driving licence; and
- (b) have acceptable driving experience, preferably not less than 5 years.

Section 4.44**Guide to Appointment****Teacher Assistant (for Special Schools)**

(For information: This document is not part of any agreement of service.)

**Appointment  
Requirements:**

To be eligible for appointment to the grade of Teacher Assistant, a candidate must:

- (a) have completed Secondary 5 (all subjects) in a registered school ; and
- (b) be fluent in Cantonese.

## Section 5

**Conditions for Promotion in Aided Schools**1. Common conditions

All promotions are subject to the following common conditions as appropriate:

- (a) With the exception of the ranks of Laboratory Technician III and II and Educational Psychologist II and I which have a combined establishment, a vacancy must exist in the higher rank to which a candidate is recommended for promotion.
- (b) All eligible candidates must be assessed by a board the Incorporated Management Committee appointed for the selection exercise. The selection board should recommend a suitable candidate, if available, for the consideration and approval of the Incorporated Management Committee. However, the approval of the Permanent Secretary is required for the promotion and acting appointment to the post of Principal. For such cases, the application must be endorsed by the Incorporated Management Committee before submission to the Permanent Secretary for consideration.
- (c) Requirements for appointment and promotion to the next higher rank for respective grades of staff are contained in the guides to appointments in Section 4 of this Compendium.

2. Training requirements for promotion of teachers

To be eligible for substantive promotion to a higher rank, the candidate must have undertaken training course(s) as stated in Attachment A of this Section, or other equivalent training course(s) acceptable to the Incorporated Management Committee based on the criteria/guiding principles as prescribed in Attachment A mentioned above. Those who have met all other promotion requirements except the specified training may be allowed to act in the promotion posts. The teachers may be confirmed to the promotion ranks with retrospective effect from the date of the approved acting appointment provided that they complete/acquire the specified training in the same academic year. If a teacher acting in the promotion post fails to successfully complete/acquire the required training within the prescribed period and with no acceptable reasons, the Incorporated Management Committee should make an alternative appointment for the promotion post.

3. Other requirements for promotion/direct appointment to the English Panel Chair Post (in secondary schools) and the additional post of Senior Teacher of English (in primary schools)

- (a) To be eligible for consideration for promotion/direct appointment to the post of additional Senior Teacher of English (STE) in primary schools/eligible special schools, a teacher should fulfil the appointment requirements laid down in the guides to appointments for Primary School Master/Mistress (PSM) and Assistant Master/Mistress (AM) in Section 4 of this Compendium.

- (b) A teacher appointed as an English Panel Chair (EPC) in a secondary school/eligible special school, or as a STE in a primary school/eligible special school should have attained an average proficiency at Level 4 of the English Language Proficiency Requirement (LP4) which means that he has met both of the following criteria:
- (i) attained at least Level 3 in all the five papers in the Language Proficiency Requirement for English teachers. Specifically, he has to attain '3' or above in Reading and Listening. For Writing, Speaking and Classroom Language Assessment (CLA), the teacher has to attain, in one sitting, '3' or above in all the scales of the respective papers; AND
  - (ii) attained at Level 4 or above for three papers at least. For Writing, Speaking and CLA, Level 4 is deemed to have been attained if more than half of the scales of the respective papers are scored, in one sitting, at '4' or above (i.e. having attained Level 4 in three or more scales in Writing and CLA and four or more scales in Speaking).
- (c) A teacher will not be affected by the LP4 requirement if:
- (i) he had already taken up an EPC post on or before 18.10.2001; or he was an existing STE appointed before 1.9.2001; or
  - (ii) he had already taken up an EPC post and was deployed to take up an EPC post, or was an existing STE on transfer to take up an existing STE post, without break in service in another school under the same sponsoring body within the aided school sector on or before 18.10.2001; or
  - (iii) he was given an offer of promotion/direct appointment on or before 18.10.2001 to an EPC post, or to an existing STE post, which was to take effect in the 2001/02 school year.
- (d) However, whenever an EPC/a STE post is vacated, the school should accord priority to LP4 qualified candidates in filling the post. Should a suitable LP4 qualified candidate not be available, the school may employ a teacher who has met the basic Language Proficiency Requirement. EPCs/STEs not affected by the LP4 requirement are encouraged to acquire the LP4 qualification through the Language Proficiency Assessment for Teachers or through training or through a combination of both.
4. Other requirements for promotion/direct appointment to Principalship  
With effect from the 2004/05 school year, aspiring Principals are required to attain Certification for Principalship in addition to complying with the appointment conditions in force at the time before their appointment to principalship.

Note: Teaching experience in schools under the Direct Subsidy Scheme will be recognised for promotion purpose.



Section 5/ Attachment A  
(updated on 2 February 2015)

### Training Requirements for Promotion of Teachers

To be eligible for substantive promotion to a higher rank of a grade, a candidate must have undertaken training specified by the Permanent Secretary or other acceptable training as approved by the Incorporated Management Committee based on the criteria/guiding principles provided in paragraph 3 below.

1. Training requirements for promotion of teachers in aided secondary schools/secondary section of special schools

**(a) Non-graduate Grade**

Level	Refresher Training	Management Training
Certificated Master/Mistress (CM) to Assistant Master/Mistress (AM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Nil
Assistant Master/Mistress (AM) to Senior Assistant Master/Mistress (SAM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Basic Course for School Administrators in Secondary Schools run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Leadership Development Programme for Middle Leaders of Secondary Schools run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years

**(b) Graduate Grade**

Level	Refresher Training	Management Training
Graduate Master/Mistress (GM) to Senior Graduate Master/Mistress (SGM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Nil

Level	Refresher Training	Management Training
Senior Graduate Master/Mistress (SGM) to Principal Graduate Master/Mistress (PGM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Educational Administration and Management Course for Senior School Administrators in Secondary Schools run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Leadership Development Programme for Middle Leaders of Secondary Schools run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years
Senior Graduate Master/Mistress (SGM) to Principal Graduate Master/Mistress (PGM)*	Certification for Principalship within the previous 5 years	
Senior Graduate Master/Mistress (SGM) or Principal Graduate Master/Mistress (PGM) to Principal II/I	Certification for Principalship within the previous 5 years	
Principal Graduate Master/Mistress (PGM)* to Principal II/I	Nil	
Principal II to Principal I	Nil	

\* Secondary school head at Principal Graduate Master/Mistress (PGM) rank

## 2. Training requirements for promotion of teachers in aided primary schools/primary section of special schools

### *(a) Non-graduate Grade*

Level	Refresher Training	Management Training
Certificated Master/Mistress (CM) to Assistant Master/Mistress (AM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Nil

Level	Refresher Training	Management Training
Assistant Master/Mistress (AM) to Senior Primary School Master/Mistress (SPSM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Leadership Development Programme for Middle Leaders of Primary Schools run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years
Assistant Master/Mistress (AM)* to Senior Assistant Master/Mistress (SAM)	Nil	
Senior Assistant Master/Mistress (SAM) to Principal Assistant/Mistress (PAM)	Nil	

\* Primary school head at Assistant Master/Mistress (AM) rank

**(b) Graduate Grade**

Level	Refresher Training	Management Training
Assistant Primary School Master/Mistress (APSM) to Primary School Master/Mistress (PSM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Nil
Primary School Master/Mistress (PSM) to Senior Primary School Master/Mistress (SPSM)	Professional Development Course run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years	Leadership Development Programme for Middle Leaders of Primary Schools run by tertiary institutions undertaken within the previous 10 years, <u>or</u> Other acceptable training undertaken within the previous 10 years
Primary School Master/Mistress (PSM) to Senior Primary School Master/Mistress (SPSM)*	Certification for Principalship within the previous 5 years	

Level	Refresher Training	Management Training
Primary School Master/Mistress (PSM) or Senior Primary School Master/Mistress (SPSM) to Headmaster/Headmistress II (HM II)	Certification for Principalship within the previous 5 years	
Senior Primary School Master/Mistress (SPSM)* to Headmaster/Headmistress II (HMII)	Nil	
Headmaster/Headmistress II (HMII) to Headmaster/Headmistress I (HMI)	Nil	

\* Primary school head at Senior Primary School Master/Mistress (SPSM) rank

Note 1 The requirement for refresher training at tertiary institutions will be waived for teachers who have completed a Teacher's Certificate or a Post-graduate Certificate/Diploma in Education course within the previous 5 years.

Note 2 Requirement for special education teachers is the same as that for ordinary teachers.

Note 3 The minimum numbers of contact hours for refresher training course and management training course are 90 hours and 40 hours respectively.

Note 4 Starting from the 2011/12 school year, teachers promoted to the SPSM rank should fulfil both the refresher training and the school management training.

### 3. Other acceptable training courses

The Incorporated Management Committee may approve other course(s) undertaken by candidate as acceptable/equivalent to the training course(s) specified above based on the criteria/guiding principles as follows:

#### (a) ***Other Acceptable Refresher Training***

The training consists of course(s) that provide(s) opportunities for teachers to update their professional knowledge on modern methods and approaches related to teaching/learning and student support. The knowledge gained can facilitate them in better carrying out their duties in the school. The minimum number of contact hours is 90. The course(s) is/are offered by EDB or local tertiary institutions.

#### (b) ***Other Acceptable Management Training***

The training consists of course(s) that provide(s) opportunities for teachers

to study various school management or education administration issues. The knowledge gained can enable the teachers to contribute to the effective and efficient operation of the school. The minimum number of contact hours is 40. The course(s) is/are offered by EDB or local tertiary institutions.

Note: For aggregation of courses, no less than 50% of minimum contact hours (i.e. 45 hours for refresher training and 20 hours for management courses) should be accumulated through the courses with duration of not less than 3 days (18 contact hours) and the rest are from courses with duration of not less than half day (3 contact hours).

## Section 6

### Conditions and Procedures for Termination of Service or Dismissal of Teachers and Specialist Staff

#### 1. Termination of employment contract by notice or payment in lieu of notice

A contract of employment may be terminated by due notice or salary in lieu of notice. The length of notice or the amount of salary in lieu of notice to be given by the Incorporated Management Committee (IMC) or the teachers<sup>11</sup>/specialist staff concerned is shown below:

<i>Time of termination</i>	<i>Length of notice</i>	<i>Amount of salary in lieu of notice</i>	<i>Remarks</i>
Within the first month of probation	Not required	Not required	—
After the first month of probation	1 month	<u>For IMC</u> – An amount equivalent to the amount of salary for the notice period	<ul style="list-style-type: none"> <li>• The IMC may waive the payment of salary in lieu of notice in accordance with section 13.5(e) of the COA for Aided Schools</li> <li>• The IMC should not charge any payment of salary in lieu of notice to government funds</li> <li>• The notice period should not include maternity leave or annual leave</li> </ul>
After probation	3 months	<u>For the staff member concerned</u> – One month's salary or an amount equivalent to the amount of salary for the notice period, whichever is the less	

In respect of termination/ dismissal of teachers/ specialist staff, schools have to follow the procedures stipulated in paragraphs 2 and 3 below.

*(updated on 2 February 2015)*

#### 2. Procedures for dismissal of teachers/specialist staff employed on/after the date of the Code of Aid for Aided Schools becoming effective<sup>12</sup>

(a) The procedures in this section apply to teachers/specialist staff employed by a school on/after the date of the Code of Aid for Aided Schools becoming effective and do not apply to those employed before this date.

<sup>11</sup> Teachers stated herein refer to 'qualified teachers' as defined in the Code of Aid for Aided Schools. For 'unqualified teachers', their employment is terminable by the giving of one month's notice or salary in lieu of notice in an amount equivalent to the amount of salary for the notice period, either by the Incorporated Management Committee or the teacher concerned.

<sup>12</sup> The Code of Aid for Aided Schools will become effective for implementation by the aided IMC schools commencing the beginning of the school year subsequent to the incorporation of the IMCs.

(b) If a member of the staff in caption is found by the IMC to be performing his duties in an unsatisfactory manner (including personality, character and philosophy of education), and showing no improvement in his work after being duly advised, the following measures may be applied:

(i) For teacher/specialist staff member during the probationary period

The IMC may terminate the employment of the staff member concerned by giving him a sufficient period of notice in accordance with paragraph 1 above.

*(updated on 1 September 2011)*

(ii) For teacher/specialist staff member after probation

- The staff member concerned should be given a written warning that his work is unsatisfactory. This should be recorded in the school files and a copy of the written warning should be forwarded to the Permanent Secretary for information and/or follow-up action where necessary.
- If no improvement in the work of the staff member concerned is noticeable after an appropriate period, normally not less than one month, a second written warning embodying relevant criticisms should be given. This should be recorded in the school files and a copy of the written warning should be forwarded to the Permanent Secretary for information and/or follow-up action where necessary.

*(updated on 1 April 2013)*

- If the staff member concerned after receiving the second warning letter still shows no improvement after an appropriate period, normally not less than one month, the IMC may dismiss him or not to renew his contract after the date of expiry. The IMC should inform the Permanent Secretary.
- The staff member concerned must be given a sufficient period of notice of termination of employment in accordance with paragraph 1 above.

3. Dismissal of teachers/specialist staff employed before the Code of Aid for Aided Schools becoming effective

The IMC is reminded to follow, in respect of termination/dismissal of teachers/specialist staff employed before the Code of Aid for Aided Schools becoming effective, the “Procedures to be followed in the case of dismissal or termination of appointment of a teacher” (which is also applicable to specialist staff of special school) as stipulated in relevant Appendices of the 3 sets of COAs, namely Code of Aid for Primary Schools, Code of Aid for Secondary Schools and Code of Aid for Special Schools.

*(updated on 1 September 2011)*

## Section 7A

**Leave Entitlement****1. Sick Leave****Teaching Staff**

- (a) Full-time monthly-paid teachers including temporary monthly-paid teachers may be granted up to 28 days paid sick leave in their first year of service in aided schools. On completion of each succeeding year of service in aided schools a further 48 days will be granted. Paid sick leave can be accumulated up to a maximum of 168 days. The calculation of leave entitlement for part-time monthly-paid staff should be the same as the full-time monthly paid staff. However, with effect from 1 September 2006, a teacher with a break in service of more than 1 year will forfeit his sick leave balance.
- (b) Daily-rated supply teachers who have worked under a continuous contract for not less than 4 weeks are eligible for sickness allowance at the rate of two paid sickness days for each completed month of employment in accordance with the Employment Ordinance.
- (c) Sick leave exceeding two days should be supported by a valid medical certificate issued by a registered medical practitioner, a registered dentist or a registered Chinese medicine practitioner\*.
- (d) No-pay sick leave may be granted if a member of staff's leave balance/entitlement has been exhausted.

***Note:*** *Laboratory technicians and specialist staff will enjoy such benefits as teachers with regard to sick leave, except that laboratory technicians or specialists with a break in service of more than 45 days will forfeit their sick leave balance.*

\* The arrangement for the recognition of sick leave certificates issued by registered Chinese medical practitioners for sick leave with effect from 1 December 2006 is not applicable to sick leave for injury on duty/occupational disease unless and until the Employees' Compensation Ordinance is amended to this effect.

**Non-teaching Staff**

- (a) Non-teaching staff (other than laboratory technicians and specialist staff) paid out of the ***Salaries Grant*** in an aided school may be granted ***full paid*** sick leave subject to all other provisions stipulated in the Employment Ordinance in respect of sick leave.
- (b) No-pay sick leave may be granted if a member of staff's leave balance/entitlement has been exhausted.

**2. Maternity Leave**

- (a) Female staff who have completed 40 weeks of resident service prior to the commencement of maternity leave may be granted 10 weeks ***full-pay***



maternity leave whereas those employed under a continuous contract but with less than 40 weeks of resident service may be granted maternity leave ***without pay***. The calculation of leave entitlement for part-time monthly-paid staff should be the same as the full-time monthly-paid staff.

- (b) Other conditions of maternity leave should be subject to the provisions of the Employment Ordinance.
- (c) When more absence is recommended by a registered medical practitioner or a registered Chinese medical practitioner, additional maternity leave may be granted as no-pay leave to bring the total absence up to 6 months. Further leave without pay on the same terms may be granted.
- (d) Female teachers/specialist staff/laboratory technicians will also be eligible for full pay for any part of the maternity leave which falls within a major school holiday, i.e. Christmas, Chinese New Year, Easter and Summer Vacation if –
  - (i) their maternity leave exceeds 10 weeks and the excess portion of maternity leave falls wholly or partly within a major school holiday; and
  - (ii) they are employed under a continuous contract but have less than 40 weeks' resident service to qualify for full pay maternity leave and whose maternity leave falls wholly or partly within a major school holiday.
- (e) Maternity leave is not counted as sick leave.
- (f) A female staff is not entitled to maternity leave whilst absent from duty for other reasons.

### 3. **Annual Leave**

#### Teaching Staff

For the sake of smooth operation and operational need of a school, the annual leave of teachers is subsumed under the major school holidays, which are 90 days a year including public holidays and are primarily holidays for pupils. Teachers may also enjoy these school holidays but they may be required to carry out extra-curricular duties or assist in performing school administrative duties during these holidays at the schools' discretion.

#### Non-teaching Staff

- (a) Non-teaching staff paid out of the ***Salaries Grant*** appointed on/after 1 June 2000, who do not enjoy school holidays, may be granted paid leave on an annual basis, preferably during major school holidays subject to mutual agreement between the school and the staff, as follows:

*(updated on 1 April 2013)*

Salary point (Master Pay Scale)	Less than <u>10 years of service</u>	10 years of service <u>and over</u>
0 – 13 or equivalent and Model Scale I	14 days	18 days
14 and above	18 days	22 days

- (b) For non-teaching staff paid out of the *Salaries Grant* offered appointments before 1 June 2000\*, their entitlement to annual leave with pay is as follows:

<u>Post</u>	<u>Paid leave entitlement per annum</u>	
Laboratory technicians and specialist staff	Not less than 22 days irrespective of number of years of service	
Others	Not more than 10 years' service	14 days
	More than 10 years' service	22 days

\* Staff members should be regarded as appointed before 1 June 2000 so long as –

- (i) they remain in their present rank or get promoted to a higher rank in the same grade in their school; or
- (ii) they are deployed to the same rank from one aided school to another under the same sponsoring body; or
- (iii) they transfer to the same rank without a break in service within the aided school sector. Transfer within a period of 45 days will not be taken as break in service.

- (c) No replacement will be granted for non-teaching staff on such leave.

(updated on 1 April 2013)

#### 4. Special Tuberculosis Leave

##### Teaching Staff

- (a) Teachers who are suffering from tuberculosis may be granted special tuberculosis leave with full pay with the support of a valid medical certificate issued by a registered medical practitioner or a registered Chinese medical practitioner\* on the following terms:
- (i) those with more than one but less than four years of service may be granted up to three months leave on full pay;
  - (ii) those with four or more but less than eight years of service may be granted up to six months leave on full pay;
  - (iii) those with eight or more than eight years of service may be granted up to six months leave on full pay plus two weeks additional sick leave in respect of each additional year of service over eight years up to a

maximum of twelve months leave on full pay.

Service under all these provisions means service deemed to be continuous by the Permanent Secretary.

- (b) Upon exhaustion of special tuberculosis leave balance and sick leave balance, the staff may be granted no-pay special tuberculosis leave.

\* The arrangement for the recognition of sick leave certificates issued by registered Chinese medical practitioners for sick leave with effect from 1 December 2006 is not applicable to sick leave for injury on duty/occupational disease unless and until the Employees' Compensation Ordinance is amended to this effect.

***Note: Laboratory technicians and specialist staff will enjoy such benefits as teachers with regard to special tuberculosis leave.***

#### **5. Paternity Leave**

Staff with not less than 40 weeks' continuous service immediately before taking the paternity leave are eligible for full-pay paternity leave up to 5 working days. Schools are required to follow the administration arrangements of paternity leave as set out in the prevailing circular available on the Education Bureau homepage.

*(updated on 1 September 2016)*

#### **6. Study Leave**

##### Teaching Staff

Teachers who are selected by the Permanent Secretary for a course of training or attend a course of training approved by the Permanent Secretary in advance may continue to receive full salary for the approved period of study leave.

***Note: Laboratory technicians and specialist staff will enjoy such benefits as teachers with regard to study leave.***

#### **7. Leave for Special Events**

##### Teaching Staff

Teachers may be granted leave of not more than 14 days per academic year (i) to represent HKSAR in national or international conferences or events such as the Asian Games and the Olympic Games, (ii) upon being invited, to present paper or speak at national or international conferences or seminars in connection with education, or (iii) to participate in training and camping exercises of the Civil Aid Service, Auxiliary Medical Service or Auxiliary Police Force. Sufficient grounds and justifications should be produced to support the grant of paid leave.

#### **8. Special Leave**

##### Teaching Staff

Normally special leave with pay will not be granted to teachers on account of personal affairs during the term. However, in exceptional cases, teachers may be granted special leave with pay for a maximum of 2 days per academic year on grounds of urgent private affairs of grave importance.

**9. Leave for Juror or witness service**

The Incorporated Management Committee may grant paid leave to those selected to serve as jurors and those required to appear in court as witnesses.

**10. Rules for counting the last day of no-pay leave and relevant arrangements**

- (a) When the last day of no-pay leave is followed by a Sunday or a gazetted public holiday, such Sunday or gazetted public holiday will be regarded as an extension of the period of no-pay leave.
- (b) When the last day of no-pay leave is followed by the major school holidays, i.e. Christmas, Chinese New Year, Easter and Summer Vacation, payment of salary will resume on the day the staff member concerned reports to school for duty, provided that it is neither a Sunday nor a gazetted public holiday.
- (c) When the last day of no-pay leave is followed by a school holiday, other than the major school holidays, payment of salary will resume on the day following the last day of such no-pay leave provided that it is neither a Sunday nor a gazetted public holiday.
- (d) Where, however, no-pay leave has been granted as no-pay maternity, sick, or special tuberculosis leave, payment of salary will resume on the day following the last day of such no-pay leave, notwithstanding that the day following the last day of such no-pay leave may be a Sunday or a gazetted public holiday.

## Section 7B

**Conditions for Employment of Short-term Supply Staff**

1. The Incorporated Management Committee may approve the employment of short-term supply staff on daily pay basis to substitute for various staff, whose salaries are covered under the Salaries Grant, as follows –

<b>Type of staff</b>	<b>Condition for employment of supply staff</b>
<b><i>Teacher</i></b>	For a teacher who is on approved leave for less than 90 days <sup>13</sup> .
<b><i>Non-teaching Staff</i></b>	
Laboratory Technician	For a laboratory technician who is on approved leave for three consecutive calendar days or more.
Nurse (in school section)	For a nurse who is on approved sick leave, maternity leave or no-pay leave <u>for one or more days</u> , or to fill any unfilled vacancies provided that the school has made every effort to fill such vacancies.
Nurse (in boarding section)	For the respective staff member who is on approved sick leave, maternity leave or no-pay leave for <u>more than two days</u> , or to fill any unfilled vacancies provided that the school has made every effort to fill such vacancies.
Boarding Service Master/Mistress II	
Houseparent	
Cook	
Motor driver/Special driver	For the staff member who is on approved sick leave, maternity leave or no-pay leave for one or more days, or to fill any unfilled vacancies provided that the school has made every effort to fill such vacancies.
Clerk (in primary school or the primary school section of special school)	For the clerk who is on approved sick leave or maternity leave for not less than 14 days provided that the school has <u>only one clerk</u> who is paid out of the Salaries Grant.
Teacher Assistant	For a teacher assistant who is on approved sick leave or maternity leave for not less than 14 days.
Artisan	No supply staff
Workshop Attendant	
Watchman	

2. Employment of supply teachers and laboratory technicians

- (i) A supply teacher to be employed should be of the same grade as, or of a lower grade than, the teacher for whom he is substituting, except that a

<sup>13</sup> With the introduction of the Teacher Relief Grant (TRG), schools will be provided a recurrent cash grant calculated on approved formula for the employment of daily-rated supply teachers, where necessary, to substitute teachers on leave for less than 30 days. However, schools may continue to apply for reimbursement for employment of daily-rated supply teachers for teachers on maternity leave, sick leave and other approved leaves lasting for 30 days or more and temporary replacement on monthly terms for leave periods of 90 days or more. Schools should refer to Section 12 of the Compendium and the Supplement to School Administration Guide and related circulars for further details of the administrative arrangements and usage of the TRG.

non-graduate may be engaged to replace an unqualified teacher.

- (ii) For supply laboratory technicians, they will be paid the daily rate of a non-graduate teacher, if they hold an approved Laboratory Technician Certificate or equivalent, otherwise the daily rate of an unqualified teacher should be paid.

3. Employment of relief workers

For boarding sections which are fully operational all year round, the Incorporated Management Committee may also approve the employment of relief workers on a daily rate basis to substitute for nurses, boarding service masters/mistresses II, houseparents and cooks on annual leave if their leave cannot be staggered. Prior approval of such leave must be obtained from the Permanent Secretary.

4. Qualification for appointment of supply staff on daily basis

The qualification required for appointment of all supply staff, if applicable, should be in accordance with those stipulated in Section 4.

5. Service of supply staff

Service as supply staff on a daily pay basis is not counted for the purpose of increment or regarded as service for any other purposes.

6. Daily rates of supply staff

The daily rates of pay of supply staff should be determined by the Permanent Secretary and announced through circulars from time to time.

## Section 8

**Allowances**

(This Section should be read in conjunction with Section 4.)

**A. Responsibility Allowance****1. Responsibility allowance for Principals and deputy heads of primary schools/primary special schools**

- (a) A responsibility allowance will be payable to Principals of primary/primary special schools at the rank of Assistant Master/Mistress\* at the rate of one increment above their substantive pay while serving in this capacity.
- (b) A responsibility allowance will also be payable to Assistant Masters/Mistresses who serve as deputy heads of primary schools with 12 or more classes in addition to undertaking special duties as a Senior Teacher, or in the case of primary special schools, with 12 or more equivalent ordinary primary classes, at a rate equivalent to 75% of one increment above their substantive pay while serving in this capacity. The responsibility allowance should cease immediately upon the promotion/appointment of a teacher to the Senior Primary School Master/Mistress rank for deputy heads. In any case, the responsibility allowance for deputy heads will cease will effect from 2010/11 school year.
- (c) Over-ranked non-graduate Principals will not be eligible for the Responsibility Allowance.

\* No non-degree holder should be appointed as new primary/primary special school principal. Serving Principals at AM, SAM and PAM rank who are non-degree holders will be phased out through natural wastage.

*(updated on 1 September 2008)*

**2. Boarding Responsibility Allowance for Principals of secondary schools/special schools with an approved boarding section**

The responsibility allowance will be payable to the Principal of a secondary school/special school with an approved boarding section on condition that he should not be paid other job-related allowances, namely, the responsibility allowance for taking up headship post and the Special Education Allowance. The allowance should be equivalent to 15% of the mid-point of the salary scale for Senior Social Work Assistant.

**3. Boarding Responsibility Allowance for boarding staff**

A responsibility allowance at the rate of two increments above their substantive pay will be payable to the following boarding staff:

- (a) warden of secondary schools with an approved boarding section with 60 to 120 boarders at Chief Social Work Assistant or Assistant Social Work Officer rank;

- (b) assistant warden; and
- (c) houseparent-in-charge

at Social Work Assistant rank of secondary schools/special schools with an approved boarding section.

**B. Acting Allowance**

1. For secondary schools or secondary section of special schools, a full-time PGM/SGM/GM or SAM who has been recommended and approved to take up the **functional duties** of a higher office in the rank of Pr.I/Pr.II/PGM/SGM or PAM as appropriate on an acting basis for a qualifying period of not less than 30 calendar days will be entitled to draw an acting allowance for the period concerned as stated in paragraph 3 and 4 below.
2. For primary schools or primary section of special schools, a full-time SAM/AM/CM or HMII/SPSM/PSM/APSM who has been recommended and approved to take up the **functional duties** of a higher office in the rank of PAM/SAM/AM or HMI/HMII/SPSM/PSM as appropriate on an acting basis for a qualifying period of not less than 30 calendar days will be entitled to draw an acting allowance for the period concerned as stated in paragraph 3 and 4 below. *(updated on 1 September 2008)*
3. In the case of acting-up with replacement (this involves acting in a **functional post** which carries a higher maximum salary point than that of the teacher's substantive rank) – 90% of the difference between the teacher's substantive salary and the minimum salary of the higher rank in which he/she is acting; or at a rate equivalent to 90% of the increment next on the rank-scale of the acting post above the level of the teacher's substantive salary if it is the same or more than the minimum salary of the acting post. The rate will be revised to 100% of the difference after the first 180 calendar days of acting (Note (i)).  
*(updated on 1 April 2013)*
4. In the case of doubling-up without replacement provided (this involves acting in a headship post which carries a higher maximum salary point than that of the teacher's substantive rank in addition to undertaking his/her own duties) – 23% of the minimum salary of the higher rank or 100% of the difference in pay between the teacher's substantive salary and the minimum salary of the higher rank in which he/she is acting, whichever is the more (Note (i)).  
*(updated on 1 April 2013)*
5. Notes on award of acting allowance:
  - (a) The minimum 30-calendar-day qualifying period should include intervening Sundays and public holidays, and Sundays and public holidays immediately preceding and following the acting period. However, Sundays and public holidays immediately preceding and following the acting period will not be included in calculating the



acting allowance.

- (b) School holidays can be counted as qualifying period and attract acting allowances provided that the teachers concerned are required to perform duties of the acting posts during the holidays. Such qualifying period should be recognised and properly recorded by school.
- (c) The qualifying period may include up to a maximum of 3 consecutive days' leave or absence in total (excluding sick leave and absence for authorised training and duty) taken during the acting period. Leave and absence in excess of 3 consecutive days will not be counted as part of the qualifying period.
- (d) Leave exceeding 3 consecutive working days involves the forfeiture of acting allowance for the whole period of the acting staff's leave (i.e. leave and intervening public holidays and Sundays).

*(updated on 1 April 2013)*

- (e) When a teacher acts in different ranks consecutively, each acting appointment should be counted individually and separately and cannot be aggregated for the purpose of meeting the minimum qualifying period for acting allowances.
- (f) A teacher should only draw one acting allowance at any one time and schools should not make concurrent multiple acting appointments.
- (g) Acting appointments can be made on operational grounds even if no acting allowance is payable.
- (h) Acting allowances will be treated as salary for provident fund purposes.  
*(updated on 1 April 2013)*
- (i) The rate of acting allowance takes effect on 1 September 2004.  
*(updated on 1 April 2013)*

In addition to notes (a) – (i) above, primary and primary special schools should also note the following point:

- (j) Leave exceeding 30 days or leave necessitating the grant of another teacher to act as the Principal or deputy head for the whole or part of his leave involves the forfeiture of the responsibility allowance for the whole period of leave.

### C. Special Education Allowance

The Special Education Allowance (SEA) will be payable to teaching staff who are engaged in special education duties and have completed the recognised special education training as follows:

1. The SEA has ceased to be payable to new recruits and existing teaching staff who have not yet commenced their recognised special education training in the 2002/03 school year. This is applicable to all teaching staff of intensive remedial teaching programmes, integrated education

programmes and aided special schools (abbreviated as teaching staff of special education hereunder). *(updated on 1 September 2008)*

2. For the existing teaching staff of special education, who are in receipt of the SEA or pursuing their studies in recognised special education courses, the following arrangements will apply:
    - (a) Teaching staff of special education, including Principal I in the aided sector, who are in receipt of the SEA will retain an SEA of one salary point above their substantive salary, provided that the sum of their substantive salary and the SEA should not exceed their maximum pay point on their respective pay scale regardless of their existing pay point, except in the circumstances specified in sub-paragraph (b) below.
    - (b) Teaching staff of special education who have already reached the maximum pay point in the 2002/03 school year will be allowed to retain an SEA of one salary point above the maximum pay point.
    - (c) Teaching staff of special education who have been pursuing their studies in recognised special education courses in the 2002/03 school year are, in principle, allowed to be paid an SEA of one salary point above their substantive salary with effect from September of the following school year on successful completion of the recognised special education courses, provided that they remain as teaching staff of special education. However, the sum of their substantive salaries and the SEA should not exceed their maximum pay point on their respective pay scales.
    - (d) Teaching staff of special schools who are in receipt of other responsibility allowance are not allowed to retain the SEA with effect from 1 September 2003.
  3. The above arrangements will also be applicable to the existing teaching staff of special education on transfer to another aided school performing the duties as a teacher in a special education programme or to another aided special school without a break in service, provided that the posts they fill
    - (a) have been created in the 2002/03 school year, or
    - (b) are created after the 2002/03 school year due to expansion of classes or with explicit permission of the Education Bureau for the post-holders to retain their SEA.
  4. All teaching staff of practical schools and skills opportunity schools who are in receipt of SEA will cease to receive SEA upon full mainstreaming of their school.
- D. All allowances stated in this Section are subject to review by the Permanent Secretary from time to time when necessary, and will be treated as salary for provident fund purpose.

## Section 8/ Attachment A

**Special Education Programmes in Ordinary Aided Secondary/Primary Schools**

1. In ordinary aided secondary schools, special education programme is conducted as Integrated Education Programme.
2. Details of the special education programme conducted in ordinary aided primary schools are as follows: –

Size of Programme	<ol style="list-style-type: none"> <li>(a) The number of students in a special education programme (currently known as Intensive Remedial Teaching Programme) for children with learning difficulties is 8 – 15, except with the written permission of the Permanent Secretary;</li> <li>(b) The Permanent Secretary may from time to time approve the ratio of students per programme in respect of such category of students in need of special educational provision, as may seem to him necessary.</li> </ol>
Ratio of Teachers per Programme	The approved ratio of teachers to programme in an ordinary primary school is 1 teacher per programme. These teachers will form part of the staff establishment of the school.
Class Grant	<ol style="list-style-type: none"> <li>(a) A Class Grant is made in respect of the Intensive Remedial Teaching Programme and is paid monthly in advance.</li> <li>(b) Items of expenditure which may be charged to the Class Grant account are identical to those class-based items chargeable to the School and Class Grant.</li> </ol>

Note: Apart from the above details, special education programme in aided primary schools should be operated in accordance with the Code of Aid for Aided Schools.

*(updated on 1 September 2009)*

## Section 9

**Administration Grant for Aided Secondary Schools**

1. The Administration Grant is provided for aided secondary schools to employ administrative and janitor staff to meet their specific needs. The Incorporated Management Committee should be responsible for the appointment, dismissal, salaries and terms of service of all staff employed with the Administration Grant in accordance with all employment related rules and regulations under relevant ordinances. Expenditure on cleaning services of the school premises by contract may also be chargeable to the Administration Grant. The amount of grant is normally assessed on a per class basis at the rate, which is adjusted annually in accordance with the movement of the Composite Consumer Price Index, as announced in the relevant circular issued by the Permanent Secretary.
2. Calculation of administrative staff grant element and janitor staff grant element in the Administration Grant per class is based on the notional posts in a standard aided secondary school with 29 classes as follows –

## (a) Administrative Staff

<u>Post</u>	<u>No.</u>
Secretary	1
Clerical Officer	1
Assistant Clerical Officer	1
Typist	1
Clerical Assistant	1
	<hr style="width: 100%; border: 0.5px solid black;"/> 5

## (b) Janitor Staff

<u>Post</u>	<u>No.</u>
Office Assistant	1
Workshop/Laboratory Attendant	3
Workman II	9
	<hr style="width: 100%; border: 0.5px solid black;"/> 13

3. The janitor staff grant element payable to a secondary school may be calculated individually on an operating class basis or on a classroom equivalent basis according to the janitor staff requirement for the school in relation to the number of classrooms, special rooms, laboratories and workshops.

## Section 10

**Administration Grant/Revised Administration Grant for Aided Primary, Special Schools and Boarding Section of Aided Secondary Schools**

1. The Administration Grant or Revised Administration Grant is provided for aided primary, special schools and the boarding section of aided secondary schools for the employment of clerical and janitor staff to meet their specific needs as follows –
  - (a) Administration Grant

For a school that has elected to receive the Administration Grant, the salaries for the clerical and janitor staff employed will be paid out of the Administration Grant. The Incorporated Management Committee should be responsible for the appointment, dismissal, salaries and terms of service of these non-teaching staff in accordance with all employment related rules and regulations under relevant ordinances.
  - (b) Revised Administration Grant

For a school that has elected to receive the Revised Administration Grant, the salaries of the janitor staff will be paid through the Revised Administration Grant, while the approved salaries of the clerical staff will be paid through the Salaries Grant as provided under Section 10.1 of the Code of Aid for Aided Schools. The Incorporated Management Committee should be responsible for the appointment, dismissal, salaries and terms of service of the janitor staff in accordance with all employment related rules and regulations under relevant ordinances.
2. Schools are given an option to choose between the two Grants. Schools that opt for the Revised Administration Grant may opt for the Administration Grant if they so prefer. However, the option once exercised in favour of the Administration Grant is final and irrevocable.
3. Both the Administration Grant and the Revised Administration Grant can be used for procuring ancillary services (e.g. the cleaning of the school premises) by contract.
4. The clerical and janitor staff entitlements as shown at Section 1B for aided primary schools and Section 1C for special schools, with rates set with reference to the mid-point salary of an entitled clerical post and the maximum point salary of the janitor post at the September 1999 level, are used as the basis for calculating the amount of the Administration Grant, or Revised Administration Grant where appropriate. The rates are adjusted annually in accordance with the movement of the Composite Consumer Price Index and will be announced in the relevant circular issued by the Permanent Secretary.
5. A school that opts for the Revised Administration Grant will be required to follow the guide to appointment for clerical staff shown at Section 4.

## Section 11

**Expanded Operating Expenses Block Grant (EOEBG)**1. Purpose

The EOEBG aims at providing IMC schools with more financial autonomy in the deployment of funds for educational purposes.

2. Features

- (a) The EOEBG is provided to aided schools in the school year following their establishment of the IMCs. More non-salary recurrent grants that are formerly outside the Operating Expenses Block Grant (OEBG) are included in the EOEBG. The full list of constituent grants under the EOEBG is set out in the EOEBG User Guide. The EOEBG includes virtually all non-salary recurrent grants to aided schools, except those which are ad-hoc in nature, those which are currently under review, and those which are paid for very specific purpose on a reimbursement basis. The demarcation between the General Domain and Special Domain adopted in the OEBG is removed in the EOEBG, with the exception of some specified grants e.g. Capacity Enhancement Grant (CEG). The EOEBG is provided as one block grant and schools are free to deploy the funding flexibly.
- (b) Similar to the OEBG, schools may use the surplus under the EOEBG on items chargeable to other Education Bureau (EDB) subsidies outside the EOEBG. In addition, schools may use the surplus to top up non-recurrent expenses for projects approved/funded by the EDB. However, schools should not take out a large amount of surplus under the EOEBG to top-up a single project, which might affect the opportunity for students to enjoy other educational resources they are entitled to. Subject to certain limits, schools may also use the surplus to top up recurrent expenses arising from other government-funded projects, furniture and equipment and other facilities or educational services acquired through private donations or other fund-raising schemes.
- (c) The computation and annual adjustment of provision of the EOEBG are simplified and based mostly on the number of approved classes, except for some school specific grants. School specific grants are grants that are of special nature and only applicable to selected schools with special circumstances. They will continue to be determined separately in accordance with the prevailing criteria applicable to each of these grants.

3. Ambit

The EOEBG covers ambits of all its constituent grants. It can be used for purposes related to teaching and learning, operation and development of the schools. For example, schools may use the EOEBG to cover expenditure incurred from operating cost such as telephone and electricity charges of the schools, procurement of consumables and teaching aid, conduct of educational programmes for their students, hiring of staff outside permanent staff establishment, procurement of stores, furniture and equipment, cleansing,

security and other necessary services. It can also be deployed to finance professional development for their staff and other educational purposes endorsed by the IMCs. For employment of staff, all expenditure related to salaries, leave entitlement and statutory benefits such as Mandatory Provident Fund (MPF), Long Service Payment and Severance Payment can also be covered by the EOEBG. *(updated on 1 September 2016)*

4. Principles and rules on usages

(a) In exercising the flexibility in the use of resources, schools are required to consider carefully the interests of both students and staff. The annual provision of government subvention should be sufficient for schools to cover all operating expenditure. Schools should have sound financial planning and good budgeting in utilising government funding in order to meet the needs of current students as well as school development and various policy priorities. Schools are reminded to establish effective financial management processes in order to deploy their resources in a cost-effective and timely manner and to ensure that expenditures incurred are reasonable and necessary for educational purposes. While schools may retain up to 12 months' provision under the EOEBG, they are not expected to keep too much surplus without specific purposes. Starting from the 2012/13 school year, schools may use the surplus of the EOEBG for the payment of statutory holidays/annual leave arising from the following types of specific no-pay leave<sup>14</sup> for their staff remunerated under Salaries Grant: *(updated on 1 September 2016)*

- (i) no-pay sick/maternity/special tuberculosis leave (referred to as no-pay sick leave);
- (ii) no-pay study leave for attending education-related courses;
- (iii) no-pay leave granted due to poor health condition with medical documentary proof; and
- (iv) no-pay leave granted for alleviating the redundancy problem of an individual school/schools under the same Sponsor (prior confirmation from the School Development Officer concerned is required).

For no-pay leave other than the above listed, schools should take own responsibility to fulfill all statutory requirements including meeting any possible expenditure out of non-government funds.

*(updated on 1 April 2013)*

(b) Schools must not use the provision to procure services or materials merely to drill students for assessments. Expenditures on celebration, entertainment, flower baskets, fruit baskets, wreaths and all other similar items for ceremonial activities or tributes to other schools should be kept to the absolute minimum. When procuring furniture and equipment items,

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<sup>14</sup> Prevailing procedures should be followed in approving no-pay leave to staff in schools. Schools should retain all supporting documents for payment arising from the above specific no-pay leave for record and inspection, if required.  
*(updated on 1 April 2013)*

schools should observe the principles of prudence and propriety in the management of resources and have proper checks and balances to safeguard the use of funds in view of their future development. In addition, schools must ensure that any recurrent consequences arising from exercising funding flexibility will be absorbed within the EOEBG or met by schools' own funds.

*(updated on 1 September 2011)*

- (c) In utilising the funding flexibility of the EOEBG, schools are requested to take notice of the following:
- (i) Schools should ensure that the total spending should be kept within the amount of provision and avoid deficits as far as possible. Any deficits arising should be borne by the school's own funds.
  - (ii) Subsidy will continue to be provided for Provident Fund/MPF contributions in respect of janitors, clerical and other supporting staff employed within the provision allocated for Administration Grant/Revised Administration Grant<sup>15</sup>.
  - (iii) Surplus under the EOEBG can be used to top up no more than:
    - ◆ 50% of recurrent cost arising from government-funded projects e.g. maintenance fee for computers bought with the Quality Education Fund; and
    - ◆ 25% of recurrent cost arising from furniture and equipment and other facilities or educational service acquired through private donations or other fund-raising schemes e.g. expenses on toner for printers from private donations.

In this connection, schools are required to establish proper procedures, objective criteria and clear approving authority for transferring the surplus out of the EOEBG.

- (d) If schools deploy the school specific grants such as CEG or Administration Grant/Revised Administration Grant or provision of baseline reference under the EOEBG to employ staff, they should set aside part of these grants/provision of baseline reference for the payment of Severance Payment/Long Service Payment<sup>16</sup> as outstanding commitment. In case the funds are insufficient to settle the payment, schools may deploy surplus under the EOEBG to cover the deficit. Schools should keep a separate ledger for the Severance Payment/Long Service Payment and work out the amount payable to each staff concerned on their cessation of service.

<sup>15</sup> Including Administration Grant for Additional Clerical Assistant for aided secondary schools.  
*(updated on 1 September 2016)*

<sup>16</sup> Separate subsidies are provided to aided primary, aided secondary and special schools to pay the Long Service Payment for non-teaching staff employed under Administration Grant/Revised Administration Grant. Aided primary and special schools may also claim reimbursement of the Severance Payment for these staff following the prevailing procedures. As for aided secondary schools, the Severance Payment of the non-teaching staff should be paid through Administration Grant, which is not reimbursable.



- (e) Schools are reminded that non-education related expenditures as listed below are not allowed to be charged to the EOEBG:
- (i) entertainment expenses such as lunch/dinner for staff not related to discharge of duties<sup>17</sup>;
  - (ii) fringe benefits/welfare for staff, including housing benefits, provision of food or food allowance, medical expenses, travelling expenses<sup>18</sup>, etc.;
  - (iii) loans to staff or third parties;
  - (iv) administrative and management expenses, including salaries of staff, of the headquarters or other service units of the school sponsoring body;
  - (v) donations; and
  - (vi) any other items announced via circular/circular memorandum issued by the EDB from time to time.

In the event that expenditure is found improperly charged to the EOEBG, the EDB shall request the school concerned to explain the anomalies. In the absence of acceptable explanation, the school should make good such expenditure by charging it to its own funds. *(updated on 1 September 2016)*

#### 5. Option for developing schools

For aided schools that are newly operated or in the midst of their development stage and have yet to attain the full range of levels of classes, they may opt for the method for the new schools or continue to adopt the method for the existing schools when they establish their IMCs. The option is irrevocable.

#### 6. Accounting arrangements

Schools are required to keep a separate ledger to clearly record all the income and expenditure chargeable to the EOEBG. While the demarcation of the

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<sup>17</sup> As a guiding principle, entertainment expenses such as lunch/dinner for staff should not be charged to the EOEBG or any school funds account. However, under school-based management, the IMC may approve expenses on entertainment according to the needs and policy priorities of the school on condition that the expenditures incurred are reasonable and necessary for educational purposes and met in a cost-effective manner. In this connection, the expenses in respect of breakfasts/lunches/dinners incurred by school staff in relation to their discharge of duties in major school functions such as School Anniversary Dinner, Parent Teacher Association Annual Dinner, etc. can be charged to the EOEBG. Schools are required to avoid lavishness and to make conscientious decision in providing such expenses. The limits of such expenses per occasion and per head are \$150 for breakfast, \$350 for lunch and \$450 for dinner with service charge and tips included. The IMC is required to provide full justifications if the expenses exceed these limits.

<sup>18</sup> The IMC may approve travelling expenses for teachers escorting students in study tours in relation to their discharge of duties on condition that the expenses incurred are reasonable, necessary for educational purposes and met in a cost-effective manner. The expenses can be charged to the EOEBG. Schools should critically assess the necessity of providing related expenses and allocate appropriate resources according to their needs and policy priorities. They are reminded to follow established processes in approving such expenses.

General Domain and Special Domain is removed, schools are advised to take into consideration that schools may be required to report on the expenditure specified for programmes under certain school specific grants, like the CEG. As such, schools are also advised to keep separate sub-ledger for all school specific grants so as to facilitate reporting requirements, where necessary.

7. Surplus retention

Schools may retain a maximum amount of surplus of up to 12 months' provision of the EOEBG for the current year (excluding funds set aside as outstanding commitment for the payment of Severance Payment/Long Service Payment for staff as mentioned in paragraph 4(d) above). The Permanent Secretary may under exceptional circumstances agree that individual schools can retain surplus in excess of this level.

8. Accountability

- (a) The implementation of the EOEBG gives schools greater autonomy in the deployment of resources and, in turn, the delivery of education to their students. The quid pro quo to such autonomy is that schools have to be more transparent and accountable to the community for their performance and the use of funds. Schools must establish an accountability framework under which there are sufficient checks and balances to guard against any untoward developments. Two of the key elements of a proper accountability framework are schools' internal self-regulation and external monitoring. Self-regulation takes place through annual planning, budgeting, regular financial reporting and review by the schools themselves. *(updated on 1 September 2016)*
- (b) For external monitoring, schools are required to disclose financial information properly in their Annual School Plan and the annual School Report, which are to be uploaded onto the website of the schools. In addition, the IMCs are also required to submit to the EDB their annual accounts including the information as required by the EDB, which will have been audited by a certified public accountant (practising) as defined in the Professional Accountants Ordinance (Cap. 50).
- (c) An IMC of a school is responsible for the proper management, administration and operation of the school. It handles funds and assets received from the Government in the capacity of a trustee. Therefore, it is obliged to hold accountable for any improper use of public resources.

For further details, please refer to the reference materials on EOEBG uploaded onto the EDB website (<http://www.edb.gov.hk> → School Administration and Management → Financial Management → General Finance → Reference Materials on E/OEBG and CFEG) and the relevant circular.

*(updated on 1 April 2013)*

## Section 12

**Teacher Relief Grant (TRG)**1. Purpose

The TRG aims at simplifying the administrative procedure for appointing supply teachers to replace teachers on leave and providing flexibility for schools to opt to obtain a cash grant by freezing up to 10% of their teaching establishment in aided schools established with IMCs. Schools will have enhanced financial support and autonomy in planning their manpower deployment, organising staff professional development and student learning activities, and employing staff of various disciplines.

2. Features

- (a) An annual recurrent cash grant under the TRG is provided to each IMC school to cover approved leave of eligible teachers. With the TRG, schools are no longer required to apply for reimbursement of supply teachers for teachers on leave lasting for less than 30 days. Schools are allowed to claim reimbursement from the EDB for appointing supply teachers for regular teachers on maternity leave, sick leave and other approved leave lasting for 30 days or more. For leave of 30 to 89 days, daily-rated supply teachers can be reimbursed. For leave of 90 days or more, monthly term temporary replacements can be reimbursed.
- (b) With the consent of the IMC, majority of teachers and parents in advance, schools may opt to obtain a cash grant by freezing up to 10% of their approved teaching establishment with enhanced rates of computation. In this connection, the existing arrangement of Substitute Teacher Grant (STG) is replaced by the TRG for IMC schools.

3. Ambit

Schools can use the TRG to appoint temporary supply teachers or teaching-related staff. They can also have full flexibility in using the TRG to procure education-related services or employ other staff like social workers, educational psychologists, professional tutors for career-oriented studies, etc. to meet their school-based needs and requirements of the various new initiatives, including the new academic structure for senior secondary education. If the TRG is used for employment of staff, expenditures like salaries, contribution to Mandatory Provident Fund, and any statutory benefits conferred by the Employment Ordinance should be met by the TRG.

4. Principles and rules on usages

Similar to the EOEBG, schools should ensure that the expenditure incurred is reasonable and necessary for educational purposes and consider carefully the interests of students and staff. Schools should ensure that the total spending be kept within the amount of provision and avoid deficits as far as possible. Schools may use the surplus under the EOEBG to top up the TRG in case of

deficit. If there is still unsettled deficit, it has to be borne by the school's own funds.

*(updated on 1 April 2013)*

#### 5. Accounting arrangement

- (a) The annual recurrent cash grant is provided on a quarterly basis in September, November, February and May. The optional cash grant is released to schools on a claim basis and payments are also on a quarterly basis.
- (b) For reimbursement of daily-rated supply teachers to replace regular teachers on maternity leave, sick leave and other approved leave lasting for 30 days to 89 days, schools should use the claim form (EDB Form No. 110) available at the EDB website (<http://www.edb.gov.hk> → School Administration and Management → Financial Management → General Finance → TRG for Schools with an Incorporated Management Committee). For appointment of temporary teachers for regular teachers taking leave of 90 days or more on monthly term, schools should submit appointment form available at the EDB website (<http://www.edb.gov.hk> → Teachers Related → Appointment & Related Matters → Appointment Matters).
- (c) Schools wishing to apply for the optional cash grant for freezing teaching posts should use the claim form available at the EDB website (<http://www.edb.gov.hk> → School Administration and Management → Financial Management → General Finance → TRG for Schools with an Incorporated Management Committee).

*(updated on 1 April 2013)*

#### 6. Surplus retention

- (a) Schools will be allowed to accumulate surplus up to three times the annual provision of the TRG in the year in which the grant is provided.
- (b) Surplus of the TRG cannot be transferred out and cannot be used for purposes outside of the TRG. The TRG reserve must be kept separately for control and audit purpose. Transfer between the reserve accounts of the EOEBG and TRG as to bypass the permitted surplus level for each account is strictly prohibited.

#### 7. Accountability

- (a) Schools receiving the TRG should include in their School Report the use of the TRG with reference to their own situation and school-based targets. Schools should keep a separate ledger account to record all income and expenditure chargeable to the TRG.
- (b) The IMC of a school is obliged to hold accountable for any improper use of the public resources including the TRG.

- (c) IMC schools are reminded to follow the rules and regulations on procurement procedures as stipulated in EDBC No. 4/2013 if they utilise TRG for the procurement of education-related services.

*(updated on 30 April 2013)*

For further details, please refer to the reference materials on TRG uploaded onto the EDB website at <http://www.edb.gov.hk> → School Administration and Management → Financial Management → General Finance → TRG for Schools with an Incorporated Management Committee.

*(updated on 1 April 2013)*

## Section 13

**Non-Recurrent Grants****A. Non-recurrent subsidy for furniture and equipment items not covered under Expanded Operating Expenses Block Grant (EOEBG)**

1. Separate non-recurrent subsidy may be provided for furniture and equipment (F&E) items not covered under EOEBG for –
  - (a) School Administration and Management System;
  - (b) replacing standard F&E items lost in natural disaster, burglary, theft, fire etc;
  - (c) reprovisioning or redevelopment of and extension to an existing school administered under the terms of this Code of Aid; and
  - (d) new initiatives.
2. Application for provision of the above non-recurrent subsidy will be announced through circular from time to time.
3. Schools will be notified individually in writing by the responsible Section of the Education Bureau of the grant(s) that has/have been approved, the amount of provision and the due date for requesting the payment/reimbursement of the subsidy. Schools should then proceed with the procurement exercise as soon as possible in accordance with the “Guidelines on Procurement Procedures in Aided Schools” as detailed in the School Administration Guide and relevant circulars / circular memorandums in force.
4. Schools should note the following in respect of payment of non-recurrent F&E subsidy:
  - (a) where there is any subsequent reduction in tender price (e.g. through offer of discount for prompt payment) or the approved tender is for any reason cancelled, the school should inform the EDB immediately in writing of the appropriate amount of subsidy to be refunded. The amount will be offset from other subsidies payable to the school;
  - (b) where the award of the approved tender/quotation would result in the approved estimate being exceeded, the school should meet the difference between the cumulative expenditure and the approved estimate; and
  - (c) payment will be subject to availability of funds. In the event that funds in the relevant vote are exhausted in the latter part of each financial year, e.g. from January to March, payment may be postponed until the next financial year.

Note: For payment of non-recurrent furniture and equipment subsidy to aided schools, schools are required to follow the procedures in the respective prevailing circular(s) / circular memorandum(s) in force.

5. Schools should ensure that the income and expenditure of all approved non-recurrent subsidy should be properly recorded in the appropriate account books with all receipts and invoices in respect of the purchases being kept in the school for audit inspection purposes. The F&E items purchased should also be recorded in the Fixed Assets Register.

*(updated on 1 September 2016)*

**B. Major repairs and projects of \$30 million and below**

1. Requests for subsidy towards the cost of items in respect of internal/ external/ structural repair works costing \$8,000 (for secondary schools)/\$3,000 (for primary and special schools) or above must be submitted to the EDB via the appropriate channel as detailed in the call circular issued annually to schools. The completed applications should reach the EDB not later than the specified date.
2. In making their application of works, schools will have to specify the location and details of works to be done without giving the estimated costs and state the reasons why the work requests are needed. Applications from schools will be processed in accordance with the procedures for major repairs in respect of estate and non-estate aided schools as detailed in the School Administration Guide.
3. Subject to the availability of funds, the EDB will inform schools of the approved projects.
4. Schools should note that
  - (a) For Estate Schools
    - (i) All approved repair works will be carried out by maintenance term contractors supervised by the term consultants appointed by the EDB.
    - (ii) For items involving works in a non-school portion, the school should state clearly when submitting the application. Normally, the term consultants will not be responsible for any works on non-school portion which is separately identifiable from the school portion. The term consultants will only undertake works in a non-school portion when it is inseparable from the school portion at which approved repair works are to be carried out. Prior to commencement of works in the non-school portion, the Incorporated Management Committee of the school is required to agree in writing the scope of work and to pay the necessary costs with an on cost at prevailing rate charged for the works in the non-school portion.
    - (iii) The Incorporated Management Committees, as building tenants, should be responsible for the safety and soundness of their buildings. The term consultant appointed by the EDB, acting in its role as works agent, would be responsible only for the

sufficiency of the actual repair work projects undertaken by them.

(b) For non-estate schools

- (i) For approved projects costing \$2 million or below, the term consultants appointed by the EDB will approach individual schools direct to discuss the details and arrange for the works programme. For approved projects of estimated cost exceeding \$2 million each, the professional officers of the Architectural Services Department (ArchSD) will then approach individual schools to arrange for the works programme.
- (ii) For items involving works in a non-school portion, the school should state clearly when submitting the application. Normally, the term consultants/ ArchSD will not be responsible for any works on non-school portion which is separately identifiable from the school portion. The ArchSD will only undertake works in a non-school portion when it is inseparable from the school portion at which approved repair works are to be carried out. Prior to commencement of works in the non-school portion, the Incorporated Management Committee of the school is required to agree in writing the scope of work and to pay the necessary costs with an on cost at prevailing rate charged for the works in the non-school portion.

(iii) Deed of Covenant

Where capital works exceeding \$0.5 million is to be carried out in school buildings erected on private land, the trustees or legal representatives of the sponsor must execute under seal and register by Memorial in the Lands Department a Deed of Covenant which shall contain such provisions as the Permanent Secretary may require, and shall in particular provide the following –

- ◆ That the premises will be used solely for approved educational purposes or other purposes approved by the Permanent Secretary.
- ◆ That the school will be managed in accordance with the Education Ordinance and its subsidiary legislation and the Code of Aid for Aided Schools.
- ◆ That if the trustees or legal representatives of the sponsor should at any time desire to be released from the foregoing obligations, or if for any reason the school ceases to be accepted by the Permanent Secretary as an aided school, the trustees or legal representatives of the sponsor may be required to repay the whole amount of grant to the Government or an equitable proportion of such grant as assessed by the Government.



- ◆ That in the event of any breach or non-performance of any of the terms, covenants and conditions contained in the Deed of covenant, it shall be lawful for the Government to re-enter upon the lot and the school without the payment of any compensation whatsoever.

*(updated on 1 September 2016)*

C. Grant for Capital Cost for Building (for projects exceeding \$30 million)

1. Subject to funding and policy, the Permanent Secretary may approve non-recurrent grant towards the capital cost for the extension or redevelopment of existing school premises.
2. The application for the grant for capital cost for building by the Incorporated Management Committee (the Applicant) should give full justification for the proposal, including the proposed scope, the estimated cost, and the amount the Applicant will contribute. In addition, the Applicant must state in its application whether it intends to carry out the project by private contract under government subvention. The Applicant should state whether a grant of site is required from the Government or whether the proposed project is to be built on land already available. For a proposed project on private land, the Applicant should check with the relevant District Lands Office that the lease conditions of the land will permit the proposed development. A statement regarding the land title, signed by the trustee or the legal representative of the grantee should be forwarded with the proposal to the Permanent Secretary for consideration. This statement should show the location, lot number of the areas to be used. All expenditure prior to notification in writing by the Permanent Secretary of the approval of the non-recurrent grant will be the sole liability of the Applicant.
3. Consideration and approval for non-recurrent grant are subject to the conditions set out by the Permanent Secretary. Funding consideration is subject to resource allocation and the Finance Committee of the Legislative Council. The proposed project should be carried out in accordance with the requirements of the prevailing subvention policy and conditions set out by the Permanent Secretary.
4. Non-subvented portion if required by the Applicant may be included in the project subject to approval by the Permanent Secretary even when the full cost required, including consultancy and construction, etc., for the non-subvented portion is borne by the Applicant. Such non-subvented portion and the related cost will not be eligible for recurrent or non-recurrent subsidy from the Government.
5. Subject to justification for the proposal, the Permanent Secretary will issue a project definition statement to the Works Agent for feasibility study and follow up action. The Permanent Secretary will issue the project definition statement direct to the Applicant opted to carry out the project under private contract. Under this self-delivery mode, the Applicant will

- be responsible for preparing a Technical Feasibility Statement for submission to the EDB for comment and approval.
6. Upon written approval of the Technical Feasibility Statement and confirmation to proceed with the pre-tender works, the Applicant can obtain technical and fee proposals for architectural and associated consultancy services and quantity surveying consultancy services. Only registered consultants should be invited for tender and the invitation documents should be forwarded to the Permanent Secretary for comment.
  7. The Applicant should submit recommendations for appointment of consultants to the Permanent Secretary for approval on the recommendations of the ArchSD. The technical proposal and fee proposal are to be kept distinctly separated. Any opening of fee proposals prior to the EDB/ArchSD examination of the technical marking will immediately invalidate the tender or disqualify the tender from subvention. The recommended technical and fee proposals should not be accepted until written approval is given by the Permanent Secretary. The Applicant should also submit tender documents for various pre-tender works like site investigation for approval before commissioning the contracts.
  8. The Applicant should only proceed into the post-contract stage upon the written notification of the Finance Committee's funding approval. Prior to issue of tender for construction work, the Applicant should forward a list of proposed tenderers together with the draft tender documents for ArchSD's comment and approval by the Permanent Secretary.
  9. For post-contract works, a minimum of ten tenderers should be invited to tender. The Applicant should require the tenderers to deposit their tenders into the Public Works Tender Board (PWTB) Tender Box. In this regard, the Applicant should give advance notice to the Secretary of the PWTB of the works and the tender closing date. The tender closing date and time must be set at noon on a Friday not being a public holiday. Upon receipt of tenders, the Applicant will be informed by PWTB for collection of tenders.
  10. The Applicant should submit the tender recommendation to the EDB for approval. It should be noted that without exceptionally valid justifications, the Applicant is required to accept the lowest complying tenders. The Applicant must not accept any tender unless there is prior approval from the Permanent Secretary. The school shall be liable for all the consequences of accepting tenders in excess of the approved project estimates without prior approval from the EDB.
  11. Any financial commitment accepted without the prior approval of the Permanent Secretary shall be the sole responsibility of the sponsor. After the Permanent Secretary has given approval for the recommended tender, the Applicant may arrange for the signing of the contract and the commencement of construction work in accordance with the terms of the contract. A copy of the signed contract should be submitted to the EDB

for record.

12. When a project is not fully financed through the capital subvention, the school should use up its agreed contribution or any other payment arrangement as referred to in the Letter of Approval (excluding contribution to provide furniture and equipment, if applicable) before requesting payment of the subvention. If the total tender price is higher than the estimated construction cost of the school as referred to in the Letter of Approval, the school should also absorb the difference according to the payment arrangement as stated in the Letter of Approval.
13. Where the new building or extension is to be erected on private land, the trustees or legal representatives of the sponsor must execute under seal and register by Memorial in the Lands Department a Deed of Covenant which shall contain such provisions as the Permanent Secretary may require, and shall in particular provide the following:
  - (a) That the premises will be used solely for approved educational purposes or other purposes approved by the Permanent Secretary.
  - (b) That the school will be managed in accordance with the Education Ordinance and its subsidiary legislation and the Code of Aid.
  - (c) That if the sponsor should at any time desire to be released from the foregoing obligations, or if for any reason the school ceases to be accepted by the Permanent Secretary as an aided school, the sponsor may be required to repay the whole amount of grant to Government or an equitable proportion of such grant as assessed by the Government.
  - (d) That in the event of any breach or non-performance of any of the terms, covenants and conditions contained in the Deed of Covenant, it shall be lawful for the Government to re-enter upon the lot and the school without the payment of any compensation whatsoever.
14. Payment of capital subvention to a school is subject to the conditions stated in the Letter of Approval issued by the Permanent Secretary to the school receiving the subvention. Interim payment of building grant may be requested after the agreed contribution of the school towards the building cost has been fully expended. Requests for payment by the Applicant must be supported by properly receipted bills and where an architect is employed, by the architect's certificate to the effect that the work for which payment is claimed, has been satisfactorily completed. Where circumstances justify e.g. the original receipts, invoices or certificates submitted are found not acceptable, the Permanent Secretary could cease to make payment of subvention to the school and the school shall repay partly or fully the subvention received if required by the Permanent Secretary.
15. The final submission of original invoices and receipts for works should be made to the Permanent Secretary within the Period of Final Measurement as stated in the building contract (usually 12 months from the date of practical completion of the project). Under normal circumstances, the

account of the project should be closed as soon as possible and in any event within three years from the handover of the completed school building.

16. Current consultancy guidelines mandate Bills of Quantities. It should also be noted that all materials and workmanship for any works must be in accordance with the latest edition of the “General Specification for Buildings” published by the ArchSD.
17. For projects of \$30 million and below, please refer to part B of this section.

The above serves the purpose of a general guide which will be revised from time to time in accordance with the prevailing policy and practice.

*(updated on 1 September 2016)*