

English Enhancement Scheme (EES) & Refined English Enhancement Scheme (REES)
Sharing of Experiences in Procurement of Professional Services
21 & 22 February 2011

Record of Questions & Answers

General Questions on EES and REES

Q: Is it a must to include cross-curricular English elements in the REES?

1 A: To tie in better with the fine-tuned MOI arrangements taking effect from the 2010/11 school year, individual schools continuing with their EES projects may need to revisit their existing school-based measures and make appropriate refinements, and schools which have not applied for the EES or may have completed their EES projects will also merit the provision of some incentive to further enhance their English language environment for developing their whole-school language policy including the diversified MOI arrangements. Schools should make use of the funding of the Refined EES to enhance their capacity to raise students' English standard as well as to ensure that there will be sustainable effects after the scheme. When mapping out the measures, schools should focus on specific student groups or development areas. These include in-depth collaboration between English language and non-language subject teachers to promote a cross-curricular curriculum to enhance the learning of English and/ or develop effective modes in English language teaching, preparing students for the smooth transition between different stages of learning the English language, addressing students' diversities in learning English, enhancing students' confidence, motivation and ability in using English, strengthening the ability of English language teachers and/or non-language subject teachers in using English, formulating and developing the whole-school language policy to the effect that the whole school will participate in enhancing the opportunities for students to be exposed to English, etc.

In other words, the measures proposed by schools for the REES are school-based. Depending on the school-based needs as identified by individual schools, schools can propose measures on English only and/ or cross-curricular elements between English and non-language subjects.

[Reference: Paragraph 2,3,5 and 9 of Education Bureau Circular Memorandum No. 139/2010]

| | |
|---|---|
| | <p>Q: Are there any specific conditions for schools to opt Plan A or Plan B when devising their proposed school-based measures for the REES?</p> |
| 2 | <p>A: Plan A is applicable to schools which (i) have never joined the EES; (ii) have completed the EES; or (iii) will continue to implement the remaining measures of the EES separately from the application for the Refined EES.</p> <p>Plan B is applicable to schools which intend to integrate the approved measure(s) and funding under the EES into the application for the Refined EES.</p> <p>[Reference: Annex 2 of Education Bureau Circular Memorandum No. 139/2010]</p> |
| | <p>Q: Can the EDB share what measures that the first batch of REES applications have been approved of and the reasons for the approval/ disapproval of some measures?</p> |
| 3 | <p>A: In the first batch applications of the REES, only 20 odd schools applied. Their measures may not be representative enough for a sharing. For any enquiries on the REES, schools are encouraged to contact their school in-charge officers of the EES for advice specific to their own schools. For schools which have not taken part in the EES, they can refer to Education Bureau Circular Memorandum No. 139/2010 for directing their enquiries.</p> |
| | <p>Q: Should schools make use of the approved funding of the REES to hire service providers? Can schools employ an additional teacher to develop school-based curriculum?</p> |
| 4 | <p>A: Schools should take into consideration their own situation including the MOI arrangements, the ability of students and the capacity and capability of teachers to propose measures and devise plans on whole-school language policy to continue to strengthen their capacity of teaching and learning English and in English. There are no restrictions on which types of measures to be proposed, but rather schools should justify the measures they propose to be meeting the needs of their schools and are of sustainable effects upon the funding of the scheme coming to an end.</p> |

| | |
|---|---|
| 5 | <p>Q: Do the schools applying for the REES need to submit the quotation or tender documents together with the application form before the deadline of the REES application (31 March 2011)?</p> |
| | <p>A: Schools should submit either the completed Application Form A or Form B as applicable. As the amount of funding approved will be dependent on the proposal for any school, it is not appropriate to make commitments with any service providers or start the tendering procedure before approval from the EDB is granted.</p> |
| 6 | <p>Q: How do schools cover the extra expenses on granting an increment to the additional teacher under the REES?</p> <p>A: The two schemes are time-limited with the total amount of grants approved at the time of approval. During the project period, it is expected that there may be fluctuations of various pricings. If there is surplus generated from some approved measures which have been completed with the output targets pledged being met, schools may reallocate this surplus to cover the measure/s which is/are with deficit, such as the salary of additional teachers approved under the schemes. Any internal virement between the Budget items should only be between the approved items of the Budget and must not exceed 5% of the approved cashflow for that particular school year within the Project Period. If the amount of the proposed reallocation between the budget items exceeds 5%, schools should obtain the prior written approval of the Government (clauses 4.7 and 4.8 of the Performance Contract of the EES referred).</p> |
| 7 | <p>Q: Can schools make use of the funding under the REES to conduct small classes or remedial classes?</p> <p>A: The funding of the REES is not intended to enable teachers to teach smaller classes, and that remedial teaching has been taken care of by other funding under the Code of Aid. Despite this, if a school still contemplates small class or remedial teaching under the REES, the school must justify how this kind of arrangement will facilitate the students to learn English better or learn in English and how the positive effects can be sustained when this time-limited funding comes to an end.</p> |

Q: How can schools have better understanding of the performance of different service providers before issuing the invitation for tenders?

8 A: Many service providers actually publish their information on websites and send promotion pamphlets/ leaflets to schools. It is always worthwhile to study this information, but not to rely solely on it. Schools can contact the service providers direct to learn more about their services or even invite them to do presentations on their services. One way which always lends useful reference is to ask the service providers to provide a list of the schools they have served and then approach the teachers of these schools to find out more.

Preparation for Tender/ Quotation

Q: If a school cannot find an appropriate service provider to implement an approved measure under the REES, can the school arrange other means, such as old students, to provide the services and make use of the funding approved for this measure to pay this old student, such as expenses on his transportation?

9 A: When schools procure services in implementing the approved measures under the EES or REES, they should follow strictly the procedures set out in the relevant circulars to ensure transparency and fairness of the exercise. In respect of hire of any service providers or individual persons, schools are reminded to avoid conflict of interest. For the details of the procedures for procurement of services, different kinds of schools may refer to the following accordingly:

Circulars on stores and procurement matters (for government Schools only)

Education Bureau Circular No. 15/2007 (for action of aided schools and information of DSS schools)

Education Bureau Circular No. 4/2010 (for DSS schools)

If the hire of service provider is not feasible for a certain measure and that the school plans to resort to other means, such as hire of an individual person, to implement the measure, the school should write to Review and Planning Section of the EDB, which is the subject section for handling EES and REES, to inform of the proposed revision and the reason/s for it.

| | |
|----|---|
| 10 | <p>Q: Can schools place the proposed purchasing orders of the same kind of items, such as books, from different subject departments at one go when they obtain quotations so as to get a better offer?</p> |
| | <p>A: If the timing of purchase among the different subject departments is close to each other, schools can arrange one bulk purchase in order to get a better offer but the service provider must state clearly the charge for each individual item so the exact expenditure incurred to EES and REES can be duly reflected in the Expenditure Reports participating schools are required to submit annually.</p> |
| 11 | <p>Q: Do schools need to specify clearly the minimum years of relevant working experience of the instructors to be considered in the tender specification?</p> |
| 12 | <p>A: Like any other requirements, if schools think this is an essential requirement to ensure the quality of the service, they should include it in the tender specification and mark this as an ‘essential requirement’ for assessing the tender returns. In sum, schools have room to decide what requirements should be included in the specifications of the tender to ensure that they will have the type and quality of service they require.</p> <p>Q: Should government schools only hire the service providers from the latest successful Purchasing Card (PCard) merchants?</p> <p>A: For government schools, purchasing cards should be used as the normal means to procure low value stores and services not exceeding the value of \$50,000. When inviting quotations, the latest successful PCard merchant should always be invited to quote subject to satisfactory performance. Government schools making the purchases not using PCards should obtain prior written approval from the respective school heads on a case-by-case basis with sound justifications, having regard to overall cost effectiveness of individual case.</p> |

| | |
|----|---|
| 13 | <p>Q: Do schools need to specify the details of contract renewal in a contract signed between school and service provider?</p> <p>A: For government schools, they may list the details of the contract renewal arrangements in the Contract and seek the approval from the Permanent Secretary for Education before the extension of contract takes effect. For aided schools, they may extend the period of contract with the endorsement of the SMC/ IMC after obtaining the agreement of the service provider. Please note that each contract renewal should be treated as a new service and need to follow the prescribed procurement procedures according to the procurement guidelines [<i>For aided schools EDB Circular No.15/2007</i>].</p> <p>To avoid any administrative inconvenience, schools may consider putting a longer contract period in the tender specifications to guard against any unexpected delay in the delivery of the service, such as the service provider and the school unable to reach a mutually convenient time for the conduct of the contracted programmes in a certain school year.</p> |
| 14 | <p>Q: Can schools sign a contract with the appropriate service provider by stages within the same school year to monitor the performance of the service provider to ensure that it performs to standard and complies with the terms of the contract?</p> <p>A: Schools should not split an order as a way to circumvent approval requirement or quotation / tendering procedures. Schools should take the performance of service providers as well as students' interests into consideration to decide whether the above arrangements are to be made. Schools are reminded that they should follow strictly the procedures for procurement of services when they need to hire professional services.</p> <p>However, issuing separate invitations for quotations/ tenders within the same school year is normal if the services to be procured are of different natures, e.g. activities for students after school and professional development programmes for teachers.</p> <p>To protect the interest of schools, schools can insert the clause of payment by instalment according to the progress of the service in the contract with the service provider.</p> |

| | |
|---|--|
| | <p>Q: What are the proper procedures to conduct quotation/ tender clarification after receiving the service proposals from service providers?</p> |
| 15 | <p>A: To smooth the procedures for procurement exercise, schools should determine the criteria for evaluation of tenders before tenders are invited and include an outline of the evaluation criteria in the tender documents to assist prospective tenderers to prepare their tenders. Any other requirements which will be applied in deciding the suitability of tenders must also be indicated in the tender documents. Schools should also specify in the tender documents that tenderers are requested to make clarification if necessary. The tender/ quotation may not be considered if the information in the quotation/ tender proposal is incomplete. During the whole process of the tendering exercise, the procurement principle of maintaining open and fair competition should be strictly observed. All tenderers should be provided with sufficient and equal knowledge of the tender requirements and specifications of the stores / equipment / services through the tender documents and, if necessary, oral briefings. No one tenderer should get more information or more notice about the tender over the others before the selection of the tender.</p> |
| <p><i>Tender/ Quotation Evaluation/ Approval</i></p> | |
| | <p>Q: Can the teacher who is responsible for evaluating and recommending quotations or contractors participate in the work of the Tender Approving Committee (TAC)?</p> |
| 16 | <p>A: A fair, open and transparent system of tendering and procurement procedures should have been upheld at all times to ensure favouritism, corruption and malpractices are effectively checked and guarded against. If the teacher responsible for evaluating and recommending quotations or contractors has already provided clear and sufficient justifications for the TAC's consideration, he/she does not need to get involved in the work of the TAC to ensure the segregation of duties.</p> |

| | |
|----|---|
| | <p>Q: Can late tenderer be considered and approved if it is the lowest offer to specifications and it can provide the best services to the school?</p> |
| 17 | <p>A: For <u>aided schools</u>, in principle, late tenders/ quotations should not be considered unless only one supplier has been invited to tender. Late tenders/ quotations should not be opened and their covers should be clearly marked “LATE TENDER/ QUOTATION, RECEIVED BY THE TENDER/ QUOTATION OPENING AND VETTING COMMITTEE ON _____” and initialed by all members of the Tender Opening Committee before referring them to the TAC to decide on their validity. But for <u>government schools</u>, any late tender/quotation should not be opened even only one supplier is invited to bid for the service. Any late tender/ quotation should be date-stamped and initialed on the envelope containing the late tender/ quotation to certify their late submission.</p> |
| 18 | <p>Q: Can the TAC approve the tender which is not the lowest offer to specification? What justifications would the EDB accept if the lowest offer was turned down?</p> <p>A: Normally the lowest offer to specifications shall be selected. If this is not the case, sound justifications for rejecting the lower offers should be provided.</p> |
| 19 | <p>Q: If there is only one tender bid for a service contract upon tender closing date, are schools obliged to purchase the service offered by it?</p> <p>A: If the tender received conforms fully to the tender specifications and the terms and conditions laid down in the tender documents, schools can purchase the service according to the procedures set out in the relevant circulars; otherwise, schools are advised to re-tender with revised specifications, terms and conditions, where applicable. In case schools cannot find an appropriate service provider to implement an EES/REES measure within the approved implementation time-line, they can submit a written request to Review and Planning Section of the EDB with reasons to seek approval for deferral.</p> |

Education Bureau
March 2011