

Checklist on Common Administrative Issues in Aided Schools

Points to note:

1. The common administrative issues listed below are only for the general reference of aided schools. For the details of the issues and any other issue not included below, staff of aided schools should consult their respective Senior School Development Officers.
2. The updated parts are marked in red.

Index

(I) Staffing Issues
(A) Appointment
1. <u>Appointment of teaching staff (excluding school head and certain types of staff as specified in Codes of Aid)</u>
2. <u>Appointment of school head/principal</u> [Note: Schools should read this item in conjunction with item 19 of this checklist.]
3. <u>Direct appointment of teachers and other staff to promotion ranks</u> [Note: For aided primary schools under a sponsoring body with more than one aided primary school, confirmation with EDB on the available promotion teaching vacancies is required.]
4. <u>Appointment of substitute teachers (daily-rated supply and monthly-paid temporary teachers)</u> (excluding temporary Native-speaking English Teachers (NETs))
5. <u>Appointment and re-appointment of Native-speaking English Teachers (NETs) under the Enhanced NET Scheme in Secondary Schools and the NET Scheme in Primary Schools</u>
6. <u>Appointment of temporary Native-speaking English Teachers (NETs)</u>

- | |
|---|
| 7. <u>Appointment of English and Putonghua teachers (in relation to the Language Proficiency Requirement for teachers of English/ Putonghua)</u> |
| 8. <u>Appointment of English and Chinese teachers (in relation to the Recommendations of SCOLAR on Language Teacher Education and Qualifications)</u> |
| 9. <u>Appointment of Educational Psychologists</u> |
| 10. <u>Employment of temporary replacements of Educational Psychologists</u> |
| 11. <u>Appointment of Assistant Social Work Officers</u> |
| 12. <u>Employment of temporary replacement of Assistant Social Work Officers</u> |
| 13. <u>Direct appointment of Laboratory Technician II</u> |
| 14. <u>Appointment of School Executive Officers</u> |
| 15. <u>Appointment of clerical and janitor staff</u> |
| 16. <u>Optimising the Use of Teaching Manpower Resources</u> |
| (B) Acting Appointment, Regrading and Promotion |
| 17. <u>Acting appointment to fill vacant posts for substantive appointment</u> |
| 18. <u>Acting appointment for administrative convenience to approved functional posts which are left vacant for not less than 30 consecutive calendar days (excluding the school head post)</u> |
| 19. <u>Regrading to graduate teaching posts</u> |
| 20. <u>Promotion to school head</u>
[Note: Schools should read this item in conjunction with item 2 of this checklist.] |
| 21. <u>Promotion to senior teaching posts other than school head</u> |
| 22. <u>Promotion of Educational Psychologists</u> |

23. <u>Promotion of Laboratory Technicians</u>
24. <u>Acceptance of training courses for promotion purpose</u>
(C) Leave for Teachers (including School Heads)
25. <u>Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave</u>
26. <u>Paid special leave (maximum 2 days per school year)</u>
27. <u>Paid leave for serving as jurors or witnesses</u>
28. <u>Paid leave for special events as specified (maximum 14 days per school year)</u>
29. <u>No-pay leave (excluding no-pay sick/ maternity/ special tuberculosis leave)</u>
30. <u>Paid study leave which has not been endorsed by EDB in advance</u>
31. <u>Other types of leaves which are not specified above</u>
(D) Leave for Laboratory Technicians, Specialist Staff and School Executive Officers
32. <u>Paid annual leave</u>
33. <u>Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave</u>
34. <u>Paid leave for serving as jurors or witnesses</u>
35. <u>Paid study leave which has not been endorsed by EDB in advance</u>
(E) Leave for other Non-teaching Staff
36. <u>Various types of leave in accordance with the Employment Ordinance, Codes of Aid and guidelines issued by the EDB from time to time</u>

37. Annual leave for other non-teaching staff in special schools such as house-parents, nurses, cooks and the like if their leave cannot be staggered

(F) Teaching Staff Management

38. Deployment of redundant teachers/ over-ranked school heads/ redundant senior teachers/ excess graduate teachers

39. Suspension of teachers from normal duties

40. Termination of service / Non-renewal of contracts

41. Summary dismissal

42. Withholding salary increment due to unsatisfactory performance

43. Staff required to step down to a lower rank for reasons other than reduction of classes

(G) Remuneration Matter

44. Assessing salaries for teaching and non-teaching staff according to the salary scales as laid down in the Codes of Aid

45. Approving responsibility / acting allowance, and special education allowance for teachers

46. Rectification of overpayment or underpayment of salaries to teachers

47. Handling Long Service Payment/ Severance Payment for school staff

48. Permission on taking teaching experience earned outside Hong Kong for incremental credit on appointment

49. Permission on retention of existing salary for stepped-down teaching staff

50. Keeping teachers' Provident Fund Account open

51. Payment of Salary for August (for teachers with less than one academic year of service)

(H) Resignation and Retirement
52. <u>Staff tendering resignation or due for retirement</u>
53. <u>Waiver of salary payment in lieu of notice upon resignation of teaching staff</u>
54. <u>Extension of service of principals, teachers, Educational Psychologists, Assistant Social Work Officers, Laboratory Technicians and School Executive Officers after the end of the school year in which they reach the age of sixty</u>
(I) Others
55. <u>Teaching staff taking up paid or no-pay outside duties</u>
56. <u>Staff injured on duty</u>
(II) School Administration Issues
(A) School Premises and Facilities
57. <u>Change of room use without structural alteration</u>
58. <u>Conversion work with structural alteration</u>
59. <u>Use of school premises other than approved activities of the school</u>
60. <u>Capital subvention for major repairs/emergency repairs</u>
(B) Other General Items
61. <u>Uploading the endorsed Capacity Enhancement Grant Plan, School Development Plan, Annual School Plan (including the annexes of 3-year plan(s) for Diversity Learning Grant (DLG)) and School Report (including the annex of a programme evaluation report of Gifted Education Programme funded by DLG) to the school website</u>
62. <u>Class structure and expansion of school by operating additional classes</u>

63. <u>Disposal of records of books of accounts of permanent nature</u>
64. <u>Rent, Government Rent and Rates reimbursement actually paid for school purposes</u>
65. <u>Submission of holiday list in the form of school calendar and time-tables</u>
66. <u>Submission of leave record of teaching staff annually for endorsement</u>
(III) Financial Issues
(A) Procurement Activities
67. <u>Inviting, vetting and approving quotations/tenders</u>
68. <u>Appointment of different persons to handle the opening and vetting of written quotations/tenders as well as approval of tenders</u>
69. <u>Insufficient number of suppliers invited</u>
70. <u>Sub-contracting to third party by the supplier/contractor</u>
(B) Trading Operation
71. <u>Conducting trading operations</u>
72. <u>Acceptance of donations or advantages from trading operators/ suppliers</u>
73. <u>Sale of textbooks on school premises</u>
74. <u>Delegation of trading operations to Parent-Teacher Association (PTA) or School Sponsoring Body (SSB)</u>
(C) School Income
75. <u>Fund-raising activities under the conditions specified by EDB</u>
76. <u>Hire of accommodation</u>

77. <u>Collection of fees and charges (other than boarding fee and subscription/ tong fai) exceeding the approved ceiling as stipulated by EDB for educational use</u>
78. <u>Collection of subscription/ tong fai</u>
79. <u>Collection of boarding fees</u>
80. <u>Acceptance of advantages and donations</u>
81. <u>Acceptance of donation which may incur recurrent government expenditure</u>
(D) Government Subvention
82. <u>Transfer of Special Domain surpluses to Administration Grant/ Revised Administration Grant for meeting contractual obligation to the continued employment of janitor / clerical staff</u>
(IV) Student Issues
83. <u>Admission of students (other than allocation of places in Primary 1, Secondary 1 and Secondary 4) and upholding students' right to education</u>
84. <u>Promotion of students</u>
85. <u>Suspension of students</u>
86. <u>Expulsion of students at senior secondary level with full justification acceptable to the Permanent Secretary for Education</u>
87. <u>Expulsion of students aged under 15 years at or below junior secondary level</u>
88. <u>Maximum rate of repetition</u>
89. <u>Pupils taking more than seven years to complete six-year primary course</u>

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
(I) Staffing Issues			
(A) Appointment			
1. Appointment of teaching staff (excluding school head and certain types of staff as specified in Codes of Aid)	School	School	EO S42 , S44 , S45 , S46 , S47 , S48 , S49 , S50 , S51 , S52 ER R68 , R69 , R70 , R76(1) , R77 , R78 COA S19 , S49-S56 , App 2A , App 2/Att A1-A2 , App 3 , App 4/Att C-I , App 5 para 4 , App 8 [P]; S19 , S48-S56 , App 2 , App 2/Att A , App 2/Att B , App 3 , App 4 , App 4/Att C-I , App 8 , App 9 para 4-6 [S]; S53-S61 , App 2 , App 2/Att B , App 2/Att C , App 3 , App 4 , App 4/ Att A-J [excluding Att A-C, F(ii), G(ii) and H(iii)] , App 6 [Sp]; S13.1(c) & S13.2(a) [A]; S1 & S4 [Comp] SAG S7.1 para 1, 2 & 4 , S7.2.1 , S7.3-S7.4 , App 3 & 4 of Chap 7 GSA Relevant sections as applicable (Pri) (Sec) Cir EDBC No. 5/2005 , 10/2015 , 16/2017 , 11/2019 (para 8) EDBCM No. 179/2011 , 133/2018

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
			WSite On appointment http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html On All-graduate teaching force policy: https://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts/index.html [P] https://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts-sec/index.html [S]
2. Appointment of school head/principal [Note: Schools should read this item in conjunction with item 19 of this checklist.]	EDB	EDB	EO S53, S54, S55, S56, S57, S57A COA S50(a)(i), App 2A(B)(a), App 2/Att A1-2, App 3, App 4/Att A-C [P]; S49(a)(i), App2, App3, App4/Att A-C, App 9 para 1(b). [S]; S54(a)(i), App 2/Att A, App 3, App 4/Att A-C, F(ii), G(ii), H(iii) [Sp]; S13.2(a) [A] SAG S7.1 para 3e, S7.2.1 para 3, S7.3.2, App 1 of Chap 7 GSA Relevant sections as applicable (Pri) (Sec) Cir EDBC No. 31/2002, 5/2005, 2/2019, 3/2019, 4/2019, 6/2016

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			WSite	EDBCM No. 16/2017, 179/2011 http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html
3. Direct appointment of teachers and other staff to promotion ranks [Note: For aided primary schools under a sponsoring body with more than one aided primary school, confirmation with EDB on the available promotion teaching vacancies is required.]	EDB	School	COA	S50(a)(ii), S60, App 5I(1) [P]; S49(a)(ii), S59, App 9 para 1(b) [S]; S54(a)(ii), S65, App 5A1(b) [Sp]; S13.3(e) [A]
			SAG	S7.1 para 3e
			^S SAG	App D
			GSA	Relevant sections as applicable (Pri) (Sec)
			Cir	EDBC No. 30/2000 (para 2 & 6), 11/2019 (para 15)
			WSite	EDBCM No. 16/2017, 179/2011 http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html
4. Appointment of substitute teachers (daily-rated supply teachers and monthly-paid temporary teachers) (excluding temporary Native-speaking English Teachers (NETs))	School	School	COA	S31-32 [P]; S32-33 [S]; S35-36 [Sp]; S13.11 [A]; S7B para1, 2 & 4-6, S12 [Comp]
			SAG	S7.2.1 para 4 , S7.4, App 3 & 4 of Chap 7 (Relevant paras as appropriate)

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			GSA Cir WSite	Relevant sections as applicable (Pri) (Sec) <u>EDBC No. 60/1999</u> <u>EDBCM No. 179/2011, 125/2018</u> https://www.edb.gov.hk/en/teacher/appointments-related/supply-teachers/index.html
5. Appointment and re-appointment of Native-speaking English Teachers (NETs) under the Enhanced NET Scheme in Secondary Schools and the NET Scheme in Primary Schools	School	School	Cir WSite	<u>EDBC No. 7/2013</u> (for primary schools), <u>8/2013</u> (for secondary schools); <u>EDBCM No. 44/2019</u> (for primary schools), <u>45/2019</u> (for secondary schools), <u>16/2017, 179/2011</u> http://www.edb.gov.hk/en/curriculum-development/resource-support/net/index.html
6. Appointment of temporary Native-speaking English Teachers (NETs)	EDB	EDB	COA SAG GSA Cir WSite	<u>S50(a)</u> [P]; <u>S49(a)</u> [S]; <u>S54(a)(vi)</u> [Sp]; <u>S13.2(a)</u> [A] <u>S7.1 para 3e</u> Relevant sections as applicable (Pri) (Sec) <u>EDBCM No. 179/2011</u> http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/net-scheme/net-appointment-matters.html/data/sch-admin/admin/about-sch-staff/net-scheme/net-appointment-matters.html

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
			<ul style="list-style-type: none"> ● Appointment of Temporary NET (<u>Primary Schools</u>) (<u>Secondary Schools</u>)
7. Appointment of English and Putonghua teachers (in relation to the Language Proficiency Requirement for English/ Putonghua teachers)	School	School	SAG S7.4.2 para 5b Cir EDBCM No.106/2009, 112/2019 (to be updated annually) WSite http://www.edb.gov.hk/lpr
8. Appointment of English and Chinese teachers (in relation to the Recommendations of SCOLAR on Language Teacher Education and Qualifications)	School	School	SAG S7.4.2 para 5c Cir EDBCM No. 54/2004, 106/2009 WSite http://www.edb.gov.hk/sr
9. Appointment of Educational Psychologists	School	School	COA S19, S49-53, App 2A, App 3, App 4/Att J and K [P] ; S19, S48-52, App 2, App 3, App 4/Att J and K [S] ; S20, S27, S53-57, S60-63, App 2 para 7, App 3, App 4/Att J [Sp] S13.2 [A] ; S4.22-4.23 [Comp] SAG S7.2.3 para 9, S7.4.2 Para 4, App 2 of Chap 7 GSA Relevant sections as applicable (<u>Pri</u>) (<u>Sec</u>) Cir EDBC No. 5/2005, 179/2011, 10/2015 WSite http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
10. Employment of temporary replacements of Educational Psychologists	School	School	COA	S32(c) [P]; S33(c) [S]; S37(a) [Sp]; S13.11(b) [A]
11. Appointment of Assistant Social Work Officers	School	School	COA SAG GSA Cir WSite	S19 , S49-53 , 58 , App 2A , App3 , App 5/ Att L [P], S20 , S53-57 , S60-63 , App 2(para 3) , App 3 , App 4 C1 [Sp]; S13.2 [A]; S4.24 [Comp] S7.4.2 Para 4 & 5(e), App 2 of Chap 7 Relevant sections as applicable (Pri) EDBC No. 5/2005 , 179/2011 , 10/2015 , 36/2018 http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html
12. Employment of temporary replacements of Assistant Social Work Officers	School	School	COA	S32(c) [P] S13.11(b) [A]; S37(a) [Sp]
13. Direct appointment of Laboratory Technician II	School	School	COA GSA Cir	App 5 para 6 [S]; App 6 para 6 [Sp]; S4.21 [Comp] Relevant sections as applicable (Sec) EDBC No. 12/2016 EDBCM No. 179/2011 , 77/2019
14. Appointment of School Executive Officers	School	School	COA	S19 , S49-50 , S52-53 , 58 , App 2A , App3 , App 4/ Att N [P]

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
			<p>S19, S48-49, S51-52, S55-56, App 2, App 3, App 4/Att M [S] S20, S53-54, S56-57 [Sp] SAG S7.1 para1, 2 & 5, S7.2.3 para1 & 2, S 7.4.2 para 4 Cir EDBC No. 5/2005, 10/2015 EDBCM No. 179/2011, 37/2019 WSite https://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/staff-entitlement-aided-schools/index.html</p>
15. Appointment of clerical and janitor staff	School	School	<p>COA S20, S33, App 2B & App 4/ Att 0 [P]; S34, App 14/Att A [S]; S21, App 2, App 4 [Sp]; S13.10 [A] SAG S7.1 para 1&2, S7.2.3 Cir EDBC No. 5/2005, 10/2015 EDBCM No.179/2011 WSite http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/appointment/index.html</p>
16. Optimising the Use of Teaching Manpower Resources	School	School	<p>Cir EDBC No. 10/2017</p>
(B) Acting Appointment, Regrading and Promotion			
17. Acting appointment to fill vacant posts for substantive appointment	School	School	<p>COA S62, App 3C, App 5 para I(1)&(3) [P]; S62, App 3 para 2, App 9 para 1(b), 3 & 10 [S]; S67, App 3IID, App 5A1(b), App 5B [Sp];</p>

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
			<p>SAG <u>S5 para 1(b) & 2, S8B [Comp]</u></p> <p>Cir <u>S7.2.4, App 5 of Chap 7</u></p> <p><u>EDBC No. 30/2000, 8/2004</u></p>
18. Acting appointment for administrative convenience to approved functional posts which are left vacant for not less than 30 consecutive calendar days (excluding the school head post)	School	School	<p>COA <u>S62, App 3(C) [P];</u></p> <p><u>S62, App 3 para 2 [S];</u></p> <p><u>S67(b), App 3IID [Sp];</u></p> <p><u>S13.4 [A];</u></p> <p><u>S8B [Comp]</u></p> <p>SAG <u>S7.2.4, App 5 of Chap 7</u></p> <p>Cir <u>EDBC No. 30/2000, 8/2004, 11/2019 para 14</u></p>
19. Regrading to graduate teaching posts	School	School	<p>COA <u>S60 [P];</u></p> <p><u>S59 [S];</u></p> <p><u>S65 [Sp];</u></p> <p><u>S13.3(a)-(d) [A]</u></p> <p>SAG <u>S7.2.2, App 6 of Chap 7</u></p> <p>Cir <u>EDBC No. 11/2019 (para 9-12)</u></p> <p>WSite <u>http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts/index.html</u> (for primary schools)</p> <p><u>http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/graduate-teacher-posts-sec/index.html</u> (for secondary school)</p>

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
20. Promotion to school head [Note: Schools should read this item in conjunction with item 2 of this checklist.]	EDB	EDB	COA S60(a), App 4/Att A-C, D1&H1 [P]; S59(a), App 4 / A - D [S]; S65(a), App 4/ Att A, B, C, D, F(ii) G(ii), H(ii) & H(iii) [Sp]; S13.3(a) [A] S4.1-4.3, S4.6-4.8 [Comp] SAG S7.2.4, S7.3.1, S7.3.2 Cir EDBC No. 30/2000, 31/2002, 2/2019, 3/2019, 4/2019, 6/2016
21. Promotion to senior teaching posts other than school head	School	School	COA S60-61, App 4/Att C-D2, App 5 [P]; S59-60, App 4/Att C-D, App 4/Att F-H, App 9 [S]; S65-66, App 4/ Att C, D, F, G(i), H & App 5A [Sp]; S13.3(a)-(d) [A]; S5 [Comp] SAG S7.2.4 para 1 & 3, S7.3.1, S7.3.2, App 5 of Chap 7 Cir EDBC No. 30/2000, 11/2019 (para 14) WSite http://www.edb.gov.hk/en/teacher/qualification-training-development/development/training-requirements-teacher-promotion-in-aided-sch.html
22. Promotion of Educational Psychologists	School	School	COA S61, App 4/Att K, App 5 [P]; S60, App 4/Att K, App 9 [S], S66, App 4/Att J (ii), App 5 (A) 1 (a) [Sp] S4.23, S5 [Comp]

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			SAG	S7.2
			GSA	Relevant sections as applicable (<u>Pri</u>) (<u>Sec</u>)
			Cir	EDBC No. 30/2000
23. Promotion of Laboratory Technicians	School	School	COA	App 2/Att C para 4(a) , App 9 para 1, 8 & 9 [S] ; App 4B , App 5A1, A3(l) & (m) , App 6 [Sp] ; S4.21 [Comp]
			SAG	S7.2.4 para 1 , App 5 of Chap 7
			GSA	Relevant sections as applicable (<u>Sec</u>)
			Cir	EDBC No. 12/2016 EDBCM No. 77/2019
24. Acceptance of training courses for promotion purpose	EDB	School	COA	App 6 para I(3) [P] ; App 9 para 3 [S] ; App 5A 1(c) (d) [Sp] ; S5 para 2, S5/Att A [Comp]
			WSite	http://www.edb.gov.hk/en/teacher/qualification-training-development/development/training-requirements-teacher-promotion-in-aided-sch.html
(C) Leave for Teachers (including School Heads)				
25. Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave	School	School	COA	S26-30 & 35, App 9 & 10 [P] ; S25-29 & 31, App 11 & 12 [S] ; S28-32 & 34, App 10 & 11 [Sp] ;

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
26. Paid special leave (maximum 2 days per school year)	School	School	<p>S13.9 [A]; S7A [Comp] SAG S7.5.3, App 7, 9 & 10 of Chap 7 ^SSAG App H Cir EDBC No. 1/2006, 16/2015, 16/2018</p>
27. Paid leave for serving as jurors or witnesses	School	School	
28. Paid leave for special events as specified (maximum 14 days per school year)	School	School	
29. No-pay leave (excluding no-pay sick/ maternity/ special tuberculosis leave)	EDB	School [Note: Schools under IMC should notify EDB of the no-pay leave granted and seek EDB's approval for keeping the relevant teacher's Grant/ Subsidized Schools Provident Fund account open and adjustment of salary incremental date (if necessary).]	
30. Paid study leave which has not been endorsed by EDB in advance	EDB	EDB	
31. Other types of leaves which are not specified above	EDB	EDB	

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
(D) Leave for Laboratory Technicians, Specialist Staff and School Executive Officers			
32. Paid annual leave	School	School	COA S26-28, S34 & 35, App 9-11D [P];
33. Paid or no-pay sick leave, maternity leave, special tuberculosis leave, paid study leave endorsed by EDB in advance and paid paternity leave	School	School	S25-27, S30-31, App 11-13D [S]; S28-S30, App 10-12, S33&S34 [Sp]; S13.9 [A]; S7A [Comp]
34. Paid leave for serving as jurors or witnesses	School	School	S7A [Comp]
35. Paid study leave which has not been endorsed by EDB in advance	EDB	EDB	SAG S7.5.3, App 7, 9 & 10 of Chap 7 ^S SAG App H Cir EDBC No. 1/2006, 16/2015, 16/2018
(E) Leave for other Non-teaching Staff			
36. Various types of leave in accordance with the Employment Ordinance, Codes of Aid and guidelines issued by EDB from time to time	School	School	COA S34, App 11E-12 [P]; S33, App 10, App 11 & App 12 [Sp]; S13.9 [A]; S7A [Comp] SAG S7.5.3 para 3b, App 7, 9 & 10 of Chap 7 ^S SAG App H Cir EDBC No. 1/2006, 16/2015, 16/2018
37. Annual leave for other non-teaching staff in special schools such as house-parents, nurses, cooks and the like if their leave cannot be staggered	School	School	COA S33, S39(b), App 12 [Sp]; S7A para 3 [Comp] SAG S7.5.3 para 3b, App 8-9 of Chap 7 ^S SAG App H

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(F) Teaching Staff Management				
38. Deployment of redundant teachers/ over-ranked school heads/ redundant senior teachers/ excess graduate teachers	School	School	EO COA ^S SAG Cir	<u>S40AG</u> <u>S13.6 [A]</u> <u>App E</u> <u>EDBCM No. 50/2019 (for primary schools), 77/2019 (for secondary and special schools)</u>
39. Suspension of teachers from normal duties	School	School	COA SAG	<u>S57(f) [P]</u> ; <u>S57(f) [S]</u> ; <u>S62(f) [Sp]</u> ; <u>S13.5(d) [A]</u> <u>S7.8.3</u>
40. Termination of service / Non-renewal of contracts	School	School	ER COA SAG	<u>R76(2)</u> <u>S57(a)-(e), App 6-8 [P]</u> ; <u>S57(a)-(e), App 6-8 [S]</u> ; <u>S62(a)-(e), App 7-9 [Sp]</u> ; <u>S13.5(a)-(b) [A]</u> ; <u>S6 [Comp]</u> <u>S7.2.1 para 2J, S7.5.1, S7.8.3, S7.10 para 1-2</u>
41. Summary dismissal	School	School	ER COA	<u>R76(2)</u> <u>S57(g), App 7-8 [P]</u> ; <u>S57(g), App 6-7 [S]</u> ; <u>S62(g), App 7-8 [Sp]</u> ; <u>S13.5(c) [A]</u> ;

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			SAG	<u>S6</u> [Comp] <u>S7.2.1 para 2J</u> , <u>S7.5.1</u> , <u>S7.8.3</u> , <u>S7.10 para 2</u>
42. Withholding salary increment due to unsatisfactory performance	EDB	School	COA SAG ^S SAG	<u>S24(b)</u> [P]; <u>S23(b)</u> [S]; <u>S25(b)</u> [Sp]; <u>S10.1(b)</u> [A] <u>S7.8.3</u> <u>App A</u>
43. Staff required to step down to a lower rank for reasons other than reduction of classes	EDB	School	COA ^S SAG	<u>S13.7</u> [A] <u>App F</u>
(G) Remuneration Matter				
44. Assessing salaries for teaching and non-teaching staff according to the salary scales as laid down in the Codes of Aid	School	School	ER COA SAG GSA Cir	<u>R78</u> [Applicable to teaching staff only] <u>S22</u> , <u>S50(b)</u> , <u>App 3(A)</u> [P]; <u>S21</u> , <u>S49(b)</u> , <u>App 3 para 1</u> [S]; <u>S23</u> , <u>S54(b)</u> , <u>App 3I</u> [Sp]; <u>S10.1(a)</u> , <u>S13.1(g)</u> , <u>S13.2(b)</u> [A]; <u>S2</u> [Comp] <u>S7.2.1 para 2g</u> , <u>S7.2.3 para 1</u> <u>App 6A-App 6D</u> (for secondary schools) <u>App 6A-App 6D</u> (for primary schools) (Other relevant sections as applicable) <u>EDBC No. 5/2005</u> (para 2), <u>8/2010</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
45. Approving responsibility / acting allowance, and special education allowance for teachers	School	School	COA Cir	<u>S22</u> , <u>App 3(C)-(D)</u> , <u>App 4/Att A</u> [P]; <u>S21</u> , <u>App 3 para 2</u> , <u>App 3/Att A</u> [S]; <u>S23</u> , <u>App 3 II</u> [Sp]; <u>S10.1(a)</u> [A]; <u>S8</u> [Comp] <u>EDBC No. 8/2004, 12/2007</u>
46. Rectification of overpayment or underpayment of salaries to teachers	School	School	COA Cir	<u>S19(b) [P]</u> [S]; <u>S20(b)</u> [Sp]; <u>S13.2(b) & (c)</u> [A] <u>EDBC No. 5/2005 (para 11), 8/2010</u>
47. Handling Long Service Payment/ Severance Payment for school staff	School	School	COA SAG Cir	<u>S11 para 3&4</u> [Comp] <u>S7.5.5</u> <u>EDBCM No. 150/2019 (para 4)</u>
48. Permission on taking teaching experience earned outside Hong Kong for incremental credit on appointment	EDB	EDB	COA GSA	<u>S25</u> [P]; <u>S24</u> [S]; <u>S26</u> [Sp]; <u>S10.1(d)</u> [A] App 3, Part A, para 5 (<u>Pri</u>) (Sec)
49. Permission on retention of existing salary for stepped-down teaching staff	EDB	EDB	COA Cir	<u>S13.7(c)</u> [A] <u>EDBCM No. 50/2019</u> (for primary schools), <u>77/2019</u> (for secondary and special schools)

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
50. Keeping teachers' Provident Fund Account open	EDB	EDB	GSPFR SSPFR SAG WSite Cir	<u>S13(3)</u> <u>S13(3)</u> <u>App H para 6</u> (i) <u>Provident Fund</u> (ii) <u>Form EDB72</u> <u>EDBC No. 1/2006</u> (Annex : para 5(b) & 6)
51. Payment of Salary for August (for teachers with less than one academic year of service)	EDB	EDB	COA	<u>App 9 para 1(d) [P]</u> ; <u>App 8 para 1(d) [S]</u> ; <u>App 9 para 1(d) [Sp]</u> ; <u>S3 para (B)1(d) [Comp]</u>
(H) Resignation and Retirement				
52. Staff tendering resignation or due for retirement	School	School	COA SAG	<u>S57(a)-(d), S58, S59 [P]</u> ; <u>S57(a)-(d)&(h), S58 [S]</u> ; <u>S62(a)-(d), S64 [Sp]</u> ; <u>S13.1(c), 13.5(a), (f) & (g) [A]</u> ; <u>S3 para(B)1, S6 [Comp]</u> <u>S7.10 para 1 & 2</u>
53. Waiver of salary payment in lieu of notice upon resignation of teaching staff	School	School	COA SAG	<u>S57(e) [P]</u> ; <u>S57 (e) [S]</u> ; <u>S62(e) [Sp]</u> ; <u>S13.5(e) [A]</u> ; <u>S6 para1 [Comp]</u> <u>S7.10 para 1a & 2</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
54. Extension of service of principals, teachers, Educational Psychologists, Assistant Social Work Officers, Laboratory Technicians and School Executive Officers after the end of the school year in which they reach the age of sixty	EDB	EDB	EO COA SAG Cir	<u>S58A, S58B</u> <u>S59</u> [P]; <u>S58</u> [S]; <u>S64</u> [Sp]; <u>S13.2(a), S13.8</u> [A] <u>S7.10</u> <u>EDBCM No. 176/2018</u> (to be updated annually)
(I) Others				
55. Teaching staff taking up paid or no-pay outside duties	School	School	COA SAG	<u>S63</u> [P]; <u>S63</u> [S]; <u>S68</u> [Sp]; <u>S13.13</u> [A] <u>S7.4.4 para 3f, S7.4.4 para 4c, S7.8.2 para 3, App 7 para 7 of Chap 7</u>
56. Staff injured on duty	School	School	SAG	<u>S7.5.2 para 2</u>
(II) School Administration Issues				
(A) School Premises and Facilities				
57. Change of room use without structural alteration	School	School	COA SAG	<u>S16.3</u> [A] <u>S8.6.2, App 6 & 7 of Chap 8</u>
58. Conversion work with structural alteration	EDB	EDB	EO ER	<u>S19, S20</u> <u>R10</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			SAG Cir	<u>S8.6.1</u> <u>EDBC No. 3/2002</u>
59. Use of school premises other than approved activities of the school	EDB	EDB	COA SAG	<u>S48(a) [P]</u> ; <u>S47(a) [S]</u> ; <u>S52(a) [Sp]</u> ; <u>S16.1 [A]</u> <u>S8.2.1 para 1</u>
60. Capital subvention for major repairs/emergency repairs	EDB	EDB	COA SAG WSite	<u>S39(a), App 18 [P]</u> ; <u>S39(a), App 17 [S]</u> ; <u>S45(a), App 17 [Sp]</u> ; <u>S11.1, S16.2 [A]</u> ; <u>S13B [Comp]</u> <u>S6.2.1 para 3c, S8.5.2, S8.5.3</u> <u>School Maintenance Automated Rapport Terminal (SMART) system</u> <u>Procedure for Major Repairs (Non-Estate Aided Schools)</u> <u>Procedure for Major Repairs (Estate Aided Schools)</u>
(B) Other General Items				
61. Uploading the endorsed Capacity Enhancement Grant Plan, School Development Plan, Annual School Plan	School	School	COA SAG	<u>S17.1 [A]</u> <u>S5.3.4</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(including the annexes of 3-year plan(s) for Diversity Learning Grant (DLG)) and School Report (including the annex of a programme evaluation report of Gifted Education Programme funded by DLG) to the school website			Cir	EDBCM No. 1/2018 [Adapted Applied Learning Courses] , 147/2017 [Applied Learning Courses] , 58/2018 [Other Languages and Other Programmes] , 150/2019
			WSite	http://www.edb.gov.hk/en/sch-admin/sch-quality-assurance/sse/sse.html http://www.edb.gov.hk/en/sch-admin/fin-management/subsidy-info/ref-capacity-enhancement-grant/index.html http://334.edb.hkedcity.net/EN/DLG.php
62. Class structure and expansion of school by operating additional classes	EDB	EDB	COA	S12 [PI] ; S12 [SI] ; S11 [Sp] ; S7.3 [A]
			Cir	EDBCM No. 196/2018 (for primary schools), 68/2019 (for secondary schools)
63. Disposal of records of books of accounts of permanent nature	EDB	EDB	COA	S66(b) [P] ; S66(b) [S] ; S71(b) [Sp]
			SAG	S6.8
64. Rent, Government Rent and Rates reimbursement actually paid for school purposes	EDB	EDB	COA	S38 [P] ; S37 [S] ; S43 [Sp] ;

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			SAG Cir	<u>S10.2(b)(ii)</u> [A] <u>S6.2.1 para 2d</u> <u>EDBC No. 14/2007</u>
65. Submission of holiday list in the form of school calendar	EDB	EDB	ER COA SAG Cir	<u>R79, R80, R81, R82, R83, R92</u> App1, para 19. 22-23, 25-26 [P] [S]; App1, para 18, 21-22, 24 & 26 [Sp]; <u>S15.3</u> [A] <u>Appendix of Chap 2</u> <u>EDBC No. 7/2005</u> <u>EDBCM No. 167/2019</u>
66. Submission of leave record of teaching staff annually for endorsement	EDB	EDB	COA SAG ^s SAG Cir	<u>S35(a)</u> [P]; <u>S31(a)</u> [S]; <u>S34(a)</u> [Sp]; <u>S13.9(e)</u> [A] <u>S7.5.3 para 2</u> <u>App H</u> <u>EDBC No. 1/2006</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
(III) Financial Issues ^{Note}				
(A) Procurement Activities				
67. Inviting, vetting and approving quotations/tenders	School	School	SAG Cir	<u>S6.4.2 para 2b</u> <u>EDBC No. 4/2013</u>
68. Appointment of different persons to handle the opening and vetting of written quotations/tenders as well as approval of tenders	School	School	COA SAG Cir	<u>S14.6 [A]</u> <u>S6.4.2 para 2j & k</u> <u>EDBC No. 4/2013</u>
69. Insufficient number of suppliers invited	School	School	SAG Cir	<u>S6.4.2 para 2e</u> <u>EDBC No. 4/2013</u>
70. Sub-contracting to third party by the supplier/contractor	School	School	Cir	<u>EDBC No. 4/2013</u>
(B) Trading Operation				
71. Conducting trading operations	EDB	School	ER COA SAG GFM Cir	<u>R99A, R99B</u> <u>App 1 para 32-34 [P] [S] [Sp]</u> <u>S6.2.2 para 3, S6.3, S6.5.2 para 4</u> <u>S3.3, 6.2(ii) & 6.3(a)</u> <u>EDBC No. 10/2016</u>

Note The following files on financial issues are also provided for schools' reference and use and can be downloaded from EDB's Website:

1. Report on Financial and Personnel Matters Approved by SMC/IMC for Aided Schools
< <http://www.edb.gov.hk/attachment/en/sch-admin/regulations/checklist/report%20on%20financial%20and%20personnel%20matters%20approved%20by%20smc%20imc%20for%20aided%20schools.doc>>
2. Points to Note on Financial Management of Aided Schools
< http://www.edb.gov.hk/attachment/en/sch-admin/sbm/corner-imc-sch/Points%20to%20Note%20on%20Financial%20Management%20of%20Aided%20Schools_e.pdf>
3. Exception Report on Procurement Activities for Aided Schools
< <http://www.edb.gov.hk/attachment/en/common/exception%20report%20on%20procurement%20activities%20for%20aided%20schools.doc>>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
72. Acceptance of donations or advantages from suppliers / contractors	School	School	SAG Cir	S6.3 para 3b & c S2.3.4 para 2a & 2b EDBC No. 10/2016 (para 3, App 2 para 3 & App 5 para. g, h, l, m & n), 14/2003 (para 16) EDBCM No. 30/2019 (para 5 & Annex 1 para 4) EDBCM No. 172/2015 (para 5)
73. Sale of textbooks on school premises	School	School	Cir	EDBC No. 10/2016 (App 3 para 3) EDBCM No. 30/2019 (Annex 1 para 5.5)
74. Delegation of trading operations to Parent-Teacher Association (PTA) or School Sponsoring Body (SSB)	School	School	SAG Cir	S6.3 para 3e EDBC No. 10/2016 (App 2 para 3 & App 5 para a & j)
(C) School Income				
75. Fund-raising activities under the conditions specified by EDB	School	School	ER SAG	R66 S6.2.2 para 1d & 3, S6.5.2 para 3, App 5 of Chap 6
76. Hire of accommodation	School	School	SAG Cir	S6.2.2 para 1f, S8.2.2, App 1 of Chap 8 EDBC No. 5/2011
77. Collection of fees and charges (other than boarding fee and subscription/ tong fai) exceeding the approved ceiling as stipulated by EDB for educational use	EDB	School	ER COA	R61, R63, R66 S14(c) [P]; S14(d) [S]; S15(d) [Sp]; S14.3(d) [A]

Items	Approval Authority		Major Reference Materials
	Schools under SMC	Schools under IMC	
			SAG <u>S6.2.2 para 1b & 1c, App 3 & 4 of Chap 6</u> ^S SAG <u>Page 13 & 14</u> GFM <u>S3.4, 6.2(iii) & 6.3(d)</u> Cir <u>EDBC No. 14/2012</u>
78. Collection of subscription/ tong fai	EDB	EDB	ER <u>R60A, R61</u> COA <u>S14-16 [P] [S];</u> <u>S15-17 [Sp];</u> <u>S14.3(c) [A]</u> SAG <u>S6.2.2 para 1a</u> Cir <u>EDBC No. 6/2008</u>
79. Collection of boarding fees	EDB	EDB	ER <u>R60A(2), R66</u> COA <u>S12-14 [Sp];</u> <u>S14.3(b) [A]</u>
80. Acceptance of advantages and donations	School	School	COA <u>S17 [P] [S];</u> <u>S18 [Sp];</u> <u>S14.2(a) & 14.4 [A]</u> SAG <u>S6.2.2 para 1e</u> <u>S2.3.4 para 2a & 2b</u> Cir <u>EDBC No. 14/2003</u> <u>EDBCM No. 30/2019 (para 5 & Annex 1 para 4)</u> <u>EDBCM No. 172/2015 (para 5)</u>
81. Acceptance of donation which may incur recurrent government expenditure	EDB	EDB	COA <u>S17(a) (b) [P] [S];</u> <u>S18(a) (b) [Sp];</u>

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			SAG Cir	S14.4(a)(b) [A] S6.2.2 para 1e EDBC No. 14/2003 (para 17(c))
(D) Government Subvention				
82. Transfer of Special Domain surpluses to Administration Grant/ Revised Administration Grant for meeting contractual obligation to the continued employment of janitor / clerical staff	EDB	N.A.	WSite	OEBG User Guide S.4.9
(IV) Student Issues				
83. Admission of students (other than allocation of places in Primary 1, Secondary 1 and Secondary 4) and upholding students' right to education	School	School	EO COA SAG Cir	S74 S43, App 1 para 11 [P] ; S43, App 1 para 11 & 15 [S] ; S49, App 1 para 11 [Sp] ; S15.1 [A] S3.2.1, S3.2.3 EDBC No. 1/2009, 19/2019
84. Promotion of students	School	School	COA SAG	S44, App 1 para 15 [P] S3.3.2 para 1
85. Suspension of students	School	School	COA	S45, App 1 para 14 [P] ; S44, App 1 para 14 [S] ; S50, App 1 para 14 [Sp] ; S15.2(c) [A]

Items	Approval Authority		Major Reference Materials	
	Schools under SMC	Schools under IMC		
			SAG Cir	<u>S3.6.4 para 5</u> <u>EDBC No. 1/2009</u>
86. Expulsion of students at senior secondary level with full justification acceptable to the Permanent Secretary for Education	School	School	EO COA SAG Cir	<u>S74</u> <u>S44, App 1 para 12 & 13 [S];</u> <u>S15.2 [A]</u> <u>S3.6.4 para 6</u> <u>EDBC No. 1/2009</u>
87. Expulsion of students aged under 15 years at or below junior secondary level	EDB	EDB	EO COA SAG Cir	<u>S74</u> <u>S45, App 1 para 12 & 13 [P];</u> <u>S44, App 1 para 12 & 13 [S];</u> <u>S50, App 1 para 12 & 13 [Sp];</u> <u>S15.2 [A]</u> <u>S3.6.4 para 6</u> <u>EDBC No. 1/2009</u>
88. Maximum rate of repetition	EDB	EDB	COA SAG	<u>S46 [P];</u> <u>S45 [S];</u> <u>S15.4(a) [A]</u> <u>S3.3.2 para 2</u>
89. Pupils taking more than seven years to complete six-year primary course	EDB	EDB	COA SAG	<u>S44 [P];</u> <u>S15.4(b) [A]</u> <u>S3.3.2 para 2e</u>

Legend:

IMC	refers to Incorporated Management Committee	
SMC	refers to School Management Committee	
EO	refers to Education Ordinance (CAP 279)	https://www.elegislation.gov.hk/hk/cap279
ER	refers to Education Regulations (CAP 279A)	https://www.elegislation.gov.hk/hk/cap279A
GSPFR	refers to Grant Schools Provident Fund Rules (CAP 279C)	https://www.elegislation.gov.hk/hk/cap279C
SSPFR	refers to Subsidized Schools Provident Fund Rules (CAP 279D)	https://www.elegislation.gov.hk/hk/cap279D
COA	refers to Code of Aid	
[P]	refers to Code of Aid for Primary Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/coa_pri_e.pdf
[S]	refers to Code of Aid for Secondary Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/coa_sec_e.pdf
[Sp]	refers to Code of Aid for Special Schools	https://www.edb.org.hk/EDNEWHP/resource/edu_doc/coa/ss_coa/ss1_coa/coa_ss_e.pdf
[A]	refers to Code of Aid for Aided Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/code-of-aid-and-related-documents-for-aided-imc-schools/coa_english_1.13.pdf
[Comp]	refers to Compendium to Code of Aid for Aided Schools	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/code-of-aid-and-related-documents-for-aided-imc-schools/Compendium%201.13a%20.pdf
SAG	refers to School Administration Guide	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/sch-admin-guide/SAG_E.pdf
^s SAG	refers to Supplement to SAG for Aided Schools Operated by IMC	https://www.edb.gov.hk/attachment/en/sch-admin/regulations/codes-of-aid/code-of-aid-and-related-documents-for-aided-imc-schools/supplement%20to%20sag_2019.pdf
Cir	refers to EDB Circular/Circular Memorandum	http://applications.edb.gov.hk/circular/circular.aspx?langno=1
GSA	refers to Guide to Salary Assessment	http://www.edb.gov.hk/en/sch-admin/admin/about-sch-staff/salary-assessment/guides.html
GFM	refers to Guide to Financial Management for	https://www.edb.gov.hk/attachment/en/sch-admin/sbm/corner-imc-

Aided Schools Operated by Incorporated
Management Committees

[sch/fm%20guide%20english_Sept%202017r3.pdf](#)

WSite refers to EDB Website

<http://www.edb.gov.hk/>

App refers to Appendix

Att refers to Attachment

Chap refers to Chapter

para refers to paragraph

R refers to Regulation

S refers to Section

Education Bureau

September 2019 (updated)