

# **Guidelines and Forms related to Codes of Aid for Aided Primary, Secondary and Special Schools**

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# **Guidelines on Procurement Procedures in Aided Schools**

**(April 2013)**

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## Introduction

This set of Guidelines aims to facilitate schools to ensure that schools' day-to-day procurement is properly and efficiently handled and that available resources are utilised to the best advantage. This set of Guidelines is generally based on the procurement and supplies procedures currently applicable to Government Departments and is formulated in consultation with the Independent Commission Against Corruption (ICAC). All aided schools are required to strictly follow the procedures set out in this set of Guidelines. At all times, SMCs/IMCs should ensure that their schools have put in place a fair, open and transparent system of procurement procedures and there are adequate checks and balances to prevent favouritism, corruption and malpractices.

2. Schools are strongly advised to report to the SMCs/IMCs, on an annual basis, of any irregularities in the procurement procedures by completing the "Exception Report on Procurement Activities for Aided Schools" available on the Education Bureau (EDB) homepage [<http://www.edb.gov.hk/en/index.html> (*EDB homepage → School Administration and Management → Regulations → Checklist on Common Administrative Issues in Aided Schools*)].

## Prevention of Bribery Ordinance

3. It is an offence under the Prevention of Bribery Ordinance that, without lawful authority or reasonable excuse, school staff accept advantages from suppliers and contractors or the suppliers and contractors offer advantages to school staff in connection with school procurement. Schools must not permit their staff to receive advantages (including payment of commission) from suppliers and contractors. They should also inform all suppliers and contractors in writing that the offer of such advantages to school staff in connection with their official duties is illegal. This could be done by incorporating a statement in the order form or the terms of quotations/tenders. In any case, schools must not allow the choice of suppliers and contractors to be in any way influenced by any form of advantages, including donations.

4. School staff who use false accounting records (e.g. bogus quotations) or falsify documents with intent to deceive their school shall be guilty of an offence under the Prevention of Bribery Ordinance.

## Declaration of Conflict of Interest

5. Staff involved in procurement and supplies duties should be required to sign an undertaking that they would declare in writing to the SMCs/IMCs any current or future connection they or their families have with suppliers or contractors (e.g. being relatives, owners, shareholders) as soon as they become aware of it. Schools are required to properly record any declarations (a standard form is provided at **Annex I** for reference) or disclosures made and necessary action taken to avoid any actual or perceived conflict of interest. The staff declaring conflict of interest have to refrain from processing the related quotation/tender or follow the instruction of SMCs/IMCs. **This requirement should be annually brought to the notice of the staff involved by means of a circular which they should be required to sign to indicate that they**

**have read and understood it.**

### **Segregation of Duties**

6. To strengthen checks and balances, a clear segregation of staff duties is essential. Schools ought to assign different personnel for different stages of the procurement process. For example, invitation of suppliers for quotations/tenders; stores inspection and certification of services; certification of payment should be handled by different staff.

### **Principle of Fairness**

7. All suppliers invited should be provided with **sufficient and equal** knowledge of the quotation/tender requirements and specifications of the stores/equipment/services through the quotation/tender documents and, if necessary, oral briefings. No one should get more information or more notice about the quotation/tender. The specifications should be worded in easily comprehensible general terms based on the functional and performance characteristics of the stores and services required.

8. At least three weeks should be set between the issue and closing of a written quotation/tender. However, for urgent requirement, the written quotation/tender closing period may be shortened to two clear working weeks after obtaining approval from the Principal with the justifications recorded.

### **Security of Information**

9. Quotation/tender information must be kept confidential with restricted access on a need-to-know basis. All communications regarding quotations/tenders must be classified as RESTRICTED DOCUMENTS from the time quotations/tenders are received and to the time a decision is made on the acceptance or otherwise of the quotation/tender.

10. **The requirement in paragraph 9 should be annually brought to the notice of the staff involved by means of a circular which they should be required to sign to indicate that they have read and understood it.** In addition, they should sign an undertaking that they would not make any unauthorised disclosure of quotation/tender information.

## Procurement Procedures

11. The revised financial limits of procurement and their corresponding procurement arrangements and approving authorities are summarised below:

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

12. Schools may only make repeated procurement of the same items within 12 months by oral quotations and written quotations if the cumulative value of the procurement does not exceed \$50,000 and \$200,000 respectively. Schools must not split an order as a way to circumvent approval requirement or quotation/tendering procedures. Items of stores and services of the same category are to be grouped in the same quotation/tender schedule before inviting suppliers to bid. Schools should not evade the financial limits set out in paragraph 11 by dividing procurement requirements into instalments or by reducing the usual duration of contracts.

13. When inviting suppliers, the last successful supplier should always be invited to bid subject to satisfactory performance. For the remaining suppliers, schools may refer to the Supplier List provided by the EDB or other possible sources of supply identified. Suppliers should be invited by rotation to ensure equity.

### **For procurement at an estimated cost of up to \$50,000 each**

14. Procurement should be handled by school staff at an appropriate level. School staff should note that a single procurement is taken as a bill of procurement of relevant items from a single company on any one occasion.

15. Suppliers may be contacted by phone/fax to invite **oral quotations**. They

should be advised of the deadlines (i.e. closing date and time of the oral quotations) and the mode of return (i.e. by telephone, by hand, by fax, etc.).

16. **If it is not possible to invite/receive the minimum number of oral quotations, an explanatory note should be made on the Purchase-by-Oral Quotation Form (see Annex II for reference), and it should be endorsed by the Panel Head of the subject or a staff member with the salary point not lower than Master Pay Scale Point 25.**

17. School staff at an appropriate level should complete the Purchase-by-Oral Quotation Form with recommendations and submit it with the quotations received, if any, to the Principal/Deputy Head for approval. Before making recommendations, due consideration should also be given to the comparison between the price and quality of the stores and services offered by the suppliers and those available on the market. If the lowest quotation is not selected, school staff should record the reason why it is not chosen. Schools should keep the Purchase-by-Oral Quotation Form and the quotations received, if any, for audit purpose for a period of three calendar years after the completion of the order.

18. On approval by the Principal/Deputy Head, schools can then place orders.

19. Supervisory checks should be conducted randomly to satisfy that the quotations obtained are genuine. Responsible staff should date and initial on the Purchase-by-Oral Quotation Form to show that the quotations have been checked.

**For procurement at an estimated cost of more than \$50,000 each**

20. **The procurement procedures of written quotations and tenders are basically the same except those as stated in paragraphs 28, 34, 35, 45 and 46.**

***Preparation of written quotation/tender documents***

21. To handle written quotation/tendering matters, schools should refer to the “Notes for Preparation of Invitation to Written Quotation/Tender” at **Annex III** with a sample of invitation letter and separate written quotation/tender forms for procurement of stores and services. All these documents are for general reference only. Each school should seek its own independent legal advice and, where necessary, advice from the school’s technical advisers, on the terms and conditions to be adopted in the invitation letters and written quotation/tender document for each written quotation/tender exercise. The Government of the Hong Kong Special Administrative Region and its public officers shall not be liable for any losses, damage and claims of any nature whatsoever that may arise from the school’s adopting any of the terms or conditions of the sample invitation letter and/or the written quotation/tender forms.

22. A copy of the written quotation/tender form should be provided for each supplier invited. The suppliers invited should be given full specifications of the required stores and services and, whenever possible, samples should be provided or shown to the suppliers so that they are certain of the type and finish of the item required, particularly where furniture is concerned. Schools should also spell out the



pre-determined assessment criteria and marking scheme, if applicable, in the written quotation/tender documents for reference of the prospective bidders.

23. The closing date and time for submission of written quotations/tenders must be clearly specified in the written quotation/tender invitation documents.

#### ***Invitation of written quotation/tender***

24. Schools should seek written quotations for single procurement above \$50,000 and up to \$200,000, and tenders for single procurement above \$200,000 from **at least five suppliers. If it has not been possible to invite sufficient number of suppliers, the circumstances should be explained and recorded on file. Prior approval should also be obtained from the SMCs/IMCs.**

25. Suppliers should be advised to return written quotations/tenders in duplicate under sealed envelopes marked “WRITTEN QUOTATIONS/TENDERS” with the written quotation/tender number and written quotation/tender closing date and time on the cover and addressed to the Principal by post title. It is advisable for schools to provide pre-addressed envelopes or envelope-covers to suppliers to avoid the omission of relevant data. Suppliers should be advised not to identify themselves on the written quotation/tender cover. Schools should indicate the names of suppliers who have been invited on a Written Quotation/Tender Summary and Approval Record (see **Annex IV** for reference) which has to be passed to the written quotation/tender opening authority for recording the details of the responses.

26. All written quotation/tender documents should be sent to the selected suppliers by registered mail. Schools should maintain on file the recorded delivery receipts issued by the post office, showing the names of the suppliers and the date of despatch for audit purpose.

#### ***Submission of written quotation/tender***

27. Suppliers should return written quotations/tenders in duplicate to schools by mail or by hand. They should also be requested to return the written quotation/tender forms to the school stating “No Offer” even if they do not intend to submit any written quotation/tender.

28. **Written quotations must be locked up** and the key is to be kept by a member of school staff at an appropriate level whereas **tenders must be placed into the tender box** immediately upon receipt.

#### ***Tender Box***

29. A tender box (see **Annex V** for reference) should be installed as a fixture in a permanent and convenient location in the General Office to ensure proper control over the receipt of tenders.

30. The tender box must be under double lock. The key to each lock must be held by different school staff, one of whom should be at a supervisory rank.

31. The tender box must be opened at a specific time according to school's tender opening schedule. Tenders must be opened immediately if they bear a tender closing date and time which are the same as the date and time when the tender box is opened.

32. In the event that a Black Rainstorm Warning or Tropical Cyclone Warning Signal No. 8 or above is issued, the tender box should be opened on the next working day at the same time.

33. A spare set of keys is to be held by the Principal in case any key holders are unavailable when the tender box is due for opening.

### ***Opening and vetting of written quotation/tender***

34. For written quotations, **two staff members at an appropriate level** will be appointed by the Principal for opening, vetting and referring written quotation documents to the appropriate subject teacher(s) and administrative staff for evaluation and recommendation before referring the written quotation documents to the Principal for consideration and approval.

35. For tenders, a **Tender Opening and Vetting Committee (TOVC)** should be set up as follows:

- (a) The TOVC comprising two staff members (one with the salary point not lower than Master Pay Scale Point 25 and the other of a rank not lower than a Clerical Assistant or equivalent) will be appointed by the Principal **at least three working days** before the tender opening date. The two staff members of the TOVC should be appointed by rotation, whenever possible.
- (b) No forward roster of serving the TOVC needs to be maintained. A history of appointments shall, however, be maintained by the Principal in case it becomes necessary to check on the composition of a particular TOVC at a later date.
- (c) The TOVC is responsible for opening, vetting and referring tender documents to the appropriate subject teacher(s) and administrative staff for evaluation and recommendation before referring the tender documents to the Tender Approving Committee set out in paragraph 46 for consideration and approval.

36. The staff members assigned to open the written quotations are required to take action in line with the requirements set out in paragraph 37.

37. No tenders are to be opened before the tender closing date and time. The TOVC opens the tender box at the specified time on the closing day of the tender and identifies tenders due for closing on that day as well as late tenders for action. Tenders which bear a closing date later than the date of collection should be date-chopped and signed by all members of the TOVC, and then re-deposited into the tender box until

this box is re-opened. The TOVC must ensure that the tender box is locked and return keys to the key holders. Once date-chopped, second date-chopping on these tender covers by subsequent TOVC is not necessary.

38. All written quotations/tenders should be sorted by the written quotation/tender opening authority in a locked-up room. In the event that the opening of written quotations/tenders for the day cannot be completed within the school hours, the written quotation/tender opening authority shall secure the written quotations/tenders in a safe place inside the locked-up room and continue the opening of written quotations/tenders the following day. The key of the room should be kept by the Principal.

39. If written quotation/tender covers are received without a closing date and time, the written quotation/tender opening authority will still open the written quotations/tenders and action will be taken in line with paragraphs 36 to 38 and 40 to 44 **as appropriate**. Written Quotation/Tender covers without closing dates but with other identifiable features (e.g. written quotation/tender title or written quotation/tender reference number) should not be opened until the written quotation/tender closing date.

40. Late written quotations/tenders should not be opened and their covers should be clearly marked “LATE WRITTEN QUOTATION/TENDER, RECEIVED BY THE WRITTEN QUOTATION/TENDER OPENING AUTHORITY ON \_\_\_\_\_” and initialed by all members of the written quotation/tender opening authority before referring them to the written quotation/tender approving authority to decide on their validity. In principle, late written quotations/tenders should not be considered unless only one supplier has been invited. Late written quotations/tenders which the approving authority does not want to consider further should be returned under a covering letter to the suppliers. Special attention is to be paid to fairness to other suppliers in case a late written quotation/tender is to be validated.

41. On opening written quotations/tenders, the written quotation/tender opening authority should initial, date-stamp and check all written quotations/tenders to see if both the original and duplicate copies of the written quotations/tenders are identical. If alterations/amendments are found on a written quotation/tender document, the written quotation/tender opening authority should ensure that the alterations/amendments on the original copy and the duplicate are identical and then circle the revised amount/rate in red on both copies as well as initial against the revised amount/rate.

42. The written quotation/tender opening authority should enter relevant information of all written quotations/tenders received in the Written Quotation/Tender Summary and Approval Record (see **Annex IV** for reference). Random enquiries should be made to find out and record the reasons for unreturned written quotations/tenders (e.g. lost in mail).

43. Only the original set of written quotations/tenders should be passed to the subject teacher(s)/administrative staff to make recommendations. The duplicate set should be kept separately under lock and key for checking against the original set if alteration of written quotations/tenders is suspected. Before making recommendations, due consideration should also be given to the comparison between

the price and quality of the stores and services offered by the suppliers and those available on the market.

44. After vetting the written quotation/tender documents, requesting the subject teacher(s)/administrative staff to make recommendations on the written quotation/tender and completing the relevant parts of the Written Quotation/Tender Summary and Approval Record, the written quotation/tender opening authority will then pass this record and the written quotation/tender documents to the approving authority for consideration and approval.

#### ***Approval of written quotation/tender***

45. For written quotations, the approving authority rests with the **Principal**.

46. For tenders, a **Tender Approving Committee (TAC)** comprising the School Supervisor/Manager, the Principal, a teacher and a representative of the Parent-Teacher Association or a parent manager should be set up. Members of the TAC are to be appointed by the SMC or IMC. The TOVC and the TAC must be made up of different staff members and the subject teacher(s)/administrative staff responsible for making recommendations are to be excluded.

47. Before considering the recommendations, the written quotation/tender approving authority should randomly check the originals against the duplicates to ascertain that they have not been tampered with.

48. Normally, the lowest offer to specifications should be selected. If this is not the case, reasons for rejecting the lower offers should be provided. If a marking scheme is adopted, normally the written quotation/tender attained with the highest overall score should be recommended for acceptance.

49. If written quotation/tender documents are not in order (e.g. no offer complies with written quotation/tender specifications; price unreasonably high; terms unacceptable such as demand for pre-payment), the written quotation/tender approving authority may give instruction to re-invite written quotation/re-tender with revised specifications, terms and conditions, where applicable.

50. After ensuring availability of funds, the written quotation/tender approving authority may then approve the recommended written quotation/tender. Unsuccessful suppliers may be informed of the outcome after the contract has been awarded.

51. Schools should place orders before the expiry of the written quotation/tender validity period.

52. Schools should retain all original written quotations/tenders submitted by the suppliers and written quotation/tender documents including the Written Quotation/Tender Summary and Approval Record for audit purpose for a period of three calendar years after the completion of the order.

## Single Quotation/Tendering

53. Procurement of stores and services should be made through competitive bidding as far as possible. **Schools should note that single quotation/tendering should be fully justified and used only in circumstances when competitive bidding would not be an effective means of obtaining the requisite stores and services,** for instance:

- (a) where there is evidently only one potential supplier capable of providing the requisite stores and services;
- (b) where for reasons connected with the protection of copyrights or technical reasons;
- (c) where services are to be provided by utility companies; or
- (d) where maintenance is to be executed on patent or specialized equipment and where the warranty of the equipment gives the supplier of the equipment the exclusive right to carry out the maintenance service.

54. Single quotation/tendering procedures could only be initiated with the prior approval from relevant authority set out as follows and with the decisions together with justifications be properly documented:

- (a) For procurement at an estimated cost of up to \$50,000 each, prior approval has to be obtained from the Panel Head of the subject or a staff member with the salary point not lower than Master Pay Scale Point 25.
- (b) For procurement at an estimated cost of more than \$50,000 each, prior approval has to be obtained from the SMCs/IMCs.

55. Schools should follow the same procurement procedures applicable to competitive bidding for quotation/tender.

## Involvement of School Sponsoring Bodies (SSBs) in Schools' Procurement Activities

### Acquiring stores and services through SSBs

56. When SSBs are delegated by the SMCs/IMCs to carry out procurement activities on behalf of the schools, SSBs are required to follow the same procurement procedures as the aided schools.

57. Before delegations take place, **prior approval must be obtained from the SMCs/IMCs** and such records should be properly documented.

58. All relevant procurement records (including the invoices and payment vouchers, if any) should be made available to schools for audit purpose. The

SMCs/IMCs have the obligation to ensure SSBs' compliance with the procurement requirements set out in this set of Guidelines.

### **Acquiring stores and services from SSBs**

59. If SSBs wish to provide stores and services to their schools, they should be treated as one of the bidders and subject to competitive bidding and the same selection procedures applicable to other bidders.

60. The SMCs/IMCs should ensure that the SSBs concerned are treated equally and fairly as other bidders. Special attention is drawn to declaration of conflict of interest as set out in paragraph 5.

### **Acquiring stores and services from SSBs by single quotation/tendering**

61. Schools must observe the requirements as set out in paragraph 53 and **prior approval must be obtained from the SMCs/IMCs.**

62. To enable SMCs/IMCs to determine whether to accept the offer of SSBs or not, SSBs should submit price quotation with cost breakdown for the stores and services. After vetting the quotation/tender offered by the SSBs, **the accepting authority rests with the SMCs/IMCs.** The decision of the SMCs/IMCs together with the grounds leading to the decision should be properly documented.

63. In handling the single quotation/tender submitted by the SSBs, SMCs/IMCs should refer to the "Checklist for Issue and Vetting of Single Quotation/Tender for Supplies of Stores and Services by School Sponsoring Body" at **Annex VI.**

### **Sub-contracting**

64. To ensure quality of services, schools are not advised to accept contractor sub-contracting service/procurement to a third party. If considered appropriate, schools may set out the following in their quotation/tender invitation:

- (a) The contractor shall not sub-contract, assign or otherwise transfer or dispose of the contract or any part thereof or any rights and obligations without the prior written consent of the SMCs/IMCs.
- (b) The contractor shall not, without the prior written consent of the SMCs/IMCs, enter into any sub-contract with any person for the performance of any part of the contract. If the contractor considers it necessary to sub-contract the work/services, the contractor shall submit the proposed sub-contract to the SMCs/IMCs for approval. The SMCs/IMCs reserve the right to grant permission for sub-contracting and determine the terms and conditions of the sub-contract.
- (c) The contractor shall remain fully liable and shall not be relieved from any of its relevant obligations by entering into any sub-contract for the performance of any part of the contract and the contractor shall be responsible for the acts,

defaults or neglect of any sub-contractor, its employees and agents.

## **Services from Social Enterprises**

65. It is the Government's objective to enable people with disabilities (PWDs) to integrate into the community through the process of vocational rehabilitation and eventual gainful employment. While not affecting the quality of services provided to the students at large and with the prior approval from their SMCs or IMCs, schools are encouraged to procure services provided by social enterprises set up by non-governmental organisations (NGOs) which employ PWDs when opportunities arise to promote self-reliance and employment opportunities for PWDs. These organisations create training and work opportunities for PWDs and run diversified business which includes services on a longer-term (such as cleaning service, repair and maintenance, transportation service, tuck-shops in schools) as well as services on a one-off basis (such as catering services for school functions, painting, non-structural renovation works). The services provided by these disabled people to schools would also help heighten students' awareness of the diversity of our society and promote social harmony.

66. For details of services provided by social enterprises set up by NGOs which employ PWDs, schools may visit the website of the Marketing Consultancy Office (Rehabilitation) of the Social Welfare Department at <http://www.mcor.swd.gov.hk> or the Social Enterprise Resource Web at <http://www.socialenterprise.org.hk>. Schools may also contact the Marketing Consultancy Office (Rehabilitation) direct at 2835 2709.

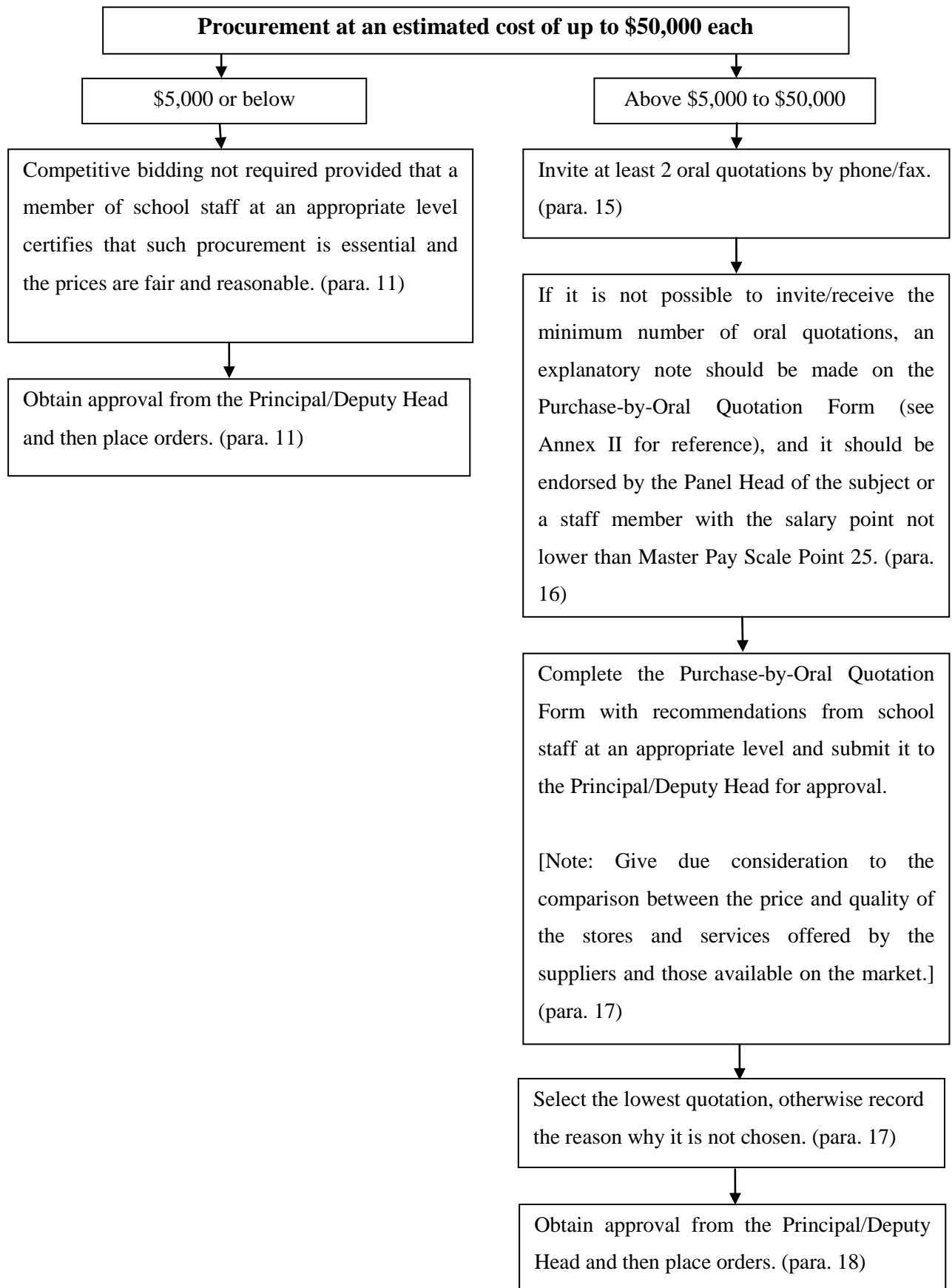
## **Supplies Inspection Team**

67. The EDB will conduct inspections to schools to ensure compliance with the procurement procedures as laid down in this set of Guidelines and to advise on supplies management and inventory control.

## **Other Useful References**

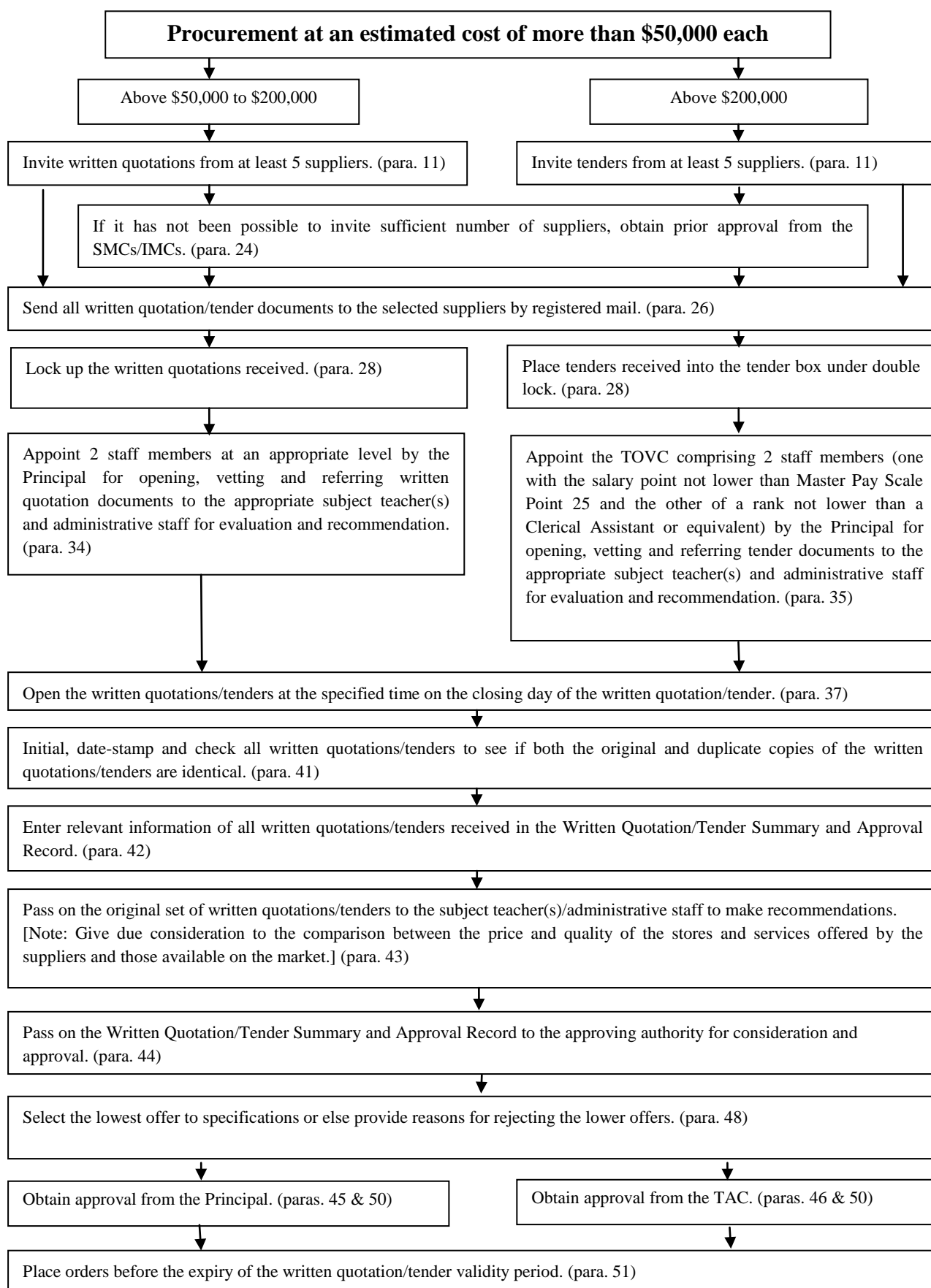
68. For more details of the procurement procedures and the handling of government subventions, schools may refer to the "Tips on Handling Government Subventions for Aided Schools" available on the EDB homepage [<http://www.edb.gov.hk/en/index.html> (*EDB homepage → School Administration and Management → Financial Management → General Finance*)]. Other useful information can also be found in "The Integrity Management for Schools – A Practical Guidebook for School Staff" available on ICAC homepage [<http://www.icac.org.hk> (*ICAC homepage → Services and Resources → Publications → Education Sector*)] and "Procurement" (*ICAC homepage → Prevention and Education → Corruption Prevention Best Practices → Procurement*) published by the Corruption Prevention Department of the ICAC.

## Summary Workflow of Procurement Procedures in Aided Schools (Estimated Cost of up to \$50,000 each)





## Summary Workflow of Procurement Procedures in Aided Schools (Estimated Cost of more than \$50,000 each)



(for school's reference only)

**Sample Form for Declaration of Conflict of Interest****Part A – Declaration of Interest**<sup>1</sup>

To: \*Supervisor/Chairman of the \*School Management Committee/Incorporated Management Committee

I understand that if I, my family members and close relatives and personal friends have any direct or indirect interest in any \*person/company which has business dealings with the school, I shall make a declaration to the \*School Management Committee/Incorporated Management Committee.

I would like to declare the following \*existing/potential conflict of interest situation arising from the discharge of my duties concerning the procurement of stores and services of the school:-

- a) \*Persons/companies with \*whom/which I have official dealings \*and/or private interests:

\_\_\_\_\_

- b) Brief description of my duties which involve the \*persons/companies mentioned in item (a) above:

\_\_\_\_\_

Signature: \_\_\_\_\_

Position and Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Part B – Record of Resolution of the School Management Committee/Incorporated Management Committee**

With respect to the above declaration,

- ☐ (name of the person making the declaration) should refrain from performing or getting involved in performing the \*work/duty, as described in Part A, which may give rise to a conflict.
- ☐ (name of the person making the declaration) may continue to handle the \*work/duty as described in Part A, provided that there is no change in the information declared above.
- ☐ Others (please specify)

Signature: \_\_\_\_\_

(\*Supervisor/Chairman of the \*SMC/IMC)<sup>2</sup>

Date of Meeting/Date: \_\_\_\_\_

(\*Delete as appropriate)

<sup>1</sup> In the daily operation, as circumstances or events warrant, the persons concerned should draw other members' attention to their perceived conflict of interest. When such a situation arises, the SMC/IMC, or the school principal as appropriate, should decide whether the person disclosing an interest shall be required to abstain from the duty assigned, or to abstain from the deliberation and decision on the subject.

<sup>2</sup> For declarations made by school staff (excluding school principal) in respect of procurement of stores and services, the SMC/IMC may delegate the approving authority to the school principal.

**Annex II**

(for school's reference only)

School Ref.:

To : \* Principal/Deputy Head

**Purchase-by-Oral Quotation Form**

I have invited the following oral quotations (above \$5,000 to \$50,000) for supply of stores or services. After comparing the price and quality of the stores or services offered by the suppliers and those available on the market, I wish to recommend acceptance of the \* lower/higher offer from \_\_\_\_\_. The reasons for not accepting the lowest offer are as follows : \_\_\_\_\_

Item No.	Brief Description of Item	Quantity Required	Name and Phone Number of Supplier	Unit Price	Total Amount	Offer Accepted "✓"
			(1)			
			(2)			

If less than two quotations are invited/received, please provide reasons in the box below :

Less than two quotations are invited/received because \_\_\_\_\_  
 Endorsed by : \_\_\_\_\_ (Rank \_\_\_\_\_ / Post \_\_\_\_\_)

As the item is required by \_\_\_\_\_, I have requested the supplier to deliver the item on or before \_\_\_\_\_, if approved. Payment may be effected after satisfactory receipt of the stores on \_\_\_\_\_.

I confirm that the above item is a single procurement and not part of a large consignment to be procured by instalments.

Quotation invited by : \_\_\_\_\_ Signature : \_\_\_\_\_

Rank : \_\_\_\_\_ Date : \_\_\_\_\_

-----  
 \* I certify that the oral quotation procedures are in order and approve the above recommendation;  
 or

\* I consider that re-inviting the oral quotation is required; or

\* I disapprove the recommendation because \_\_\_\_\_

Signature of : \_\_\_\_\_

\_\_\_\_\_  
 \* Principal/Deputy Head

Date : \_\_\_\_\_

\*Please delete as appropriate

(for school's reference only)

**Notes for Preparation of Invitation to Written Quotation/Tender**

Notes for Preparation of Invitation to Written Quotation (above \$50,000 to \$200,000)/Tender (above \$200,000) Letter (Annex III a)

Firm Name and Address - As indicated in the EDB Supplier List, etc.

School Ref. No. - According to the school's filing series.

Date - The date of mailing of invitation despatched by Registered Mail.

Para. 2 - Indicate the category of stores to be supplied or the services to be undertaken.

e.g. (i) "Written Quotation/Tender for the supply of scientific equipment"

(ii) "Written Quotation/Tender for the service of repair of school furniture"

**DO NOT USE ONE INVITATION FOR TWO CATEGORIES OF STORES INVOLVED.**

..... addressed to the Principal, and full postal address of the school

..... "noon on (date)" refers to the written quotation/tender closing date which has been set. Capital letters be printed, e.g. 23 APRIL 2013.

It is preferable to set the closing date on Monday because there will be four and a half consecutive

working days for completion of the Written Quotation/Tender Summary and Approval Record at **Annex IV**. At least three weeks should be given to suppliers before written quotation/tender closes.

Notes for Preparation of Written Quotation/Tender Schedule (attached at **Annex III a**)

The school may use large sheets or continuation sheets with page number inserted at the right hand corner on the top but the format should be the same as illustrated.

Wider spacing should be provided between the items.

Notes for Preparation of Written Quotation/Tender Form for Stores (**Annex III b**)

The heading	-	Written Quotation/Tender form for the supply of .....
		(Insert the category of stores required.)
School Ref. No.	) -	Identical to those as specified in the
Written Quotation/Tender Closing date	)	written quotation/tender invitation.
and time	)	

PART II - To be examined by the school and to ensure that this part is completed by the supplier.

Notes for Preparation of Written Quotation/Tender Form for Services (**Annex III c**)

Same application as above except the category of services to be provided should be inserted in the heading.

e.g. .... FOR THE SERVICE OF REPAIRING FURNITURE .....

(for school's reference only)

## Invitation to Written Quotation/Tender Letter

(Suppliers should be reminded not to identify their companies on the envelopes)

---

School Ref. No.

Date

Firm name  
and address

By Registered Mail

Dear Sirs,

### INVITATION TO WRITTEN QUOTATION/TENDER WRITTEN QUOTATION/TENDER FOR THE SUPPLY OF (Specify the category of stores or services)

You are invited to quote/tender for the supply of the stores or services as specified in the enclosed written quotation/tender schedule. If you are not prepared to accept a partial order, please state this clearly on the written quotation/tender schedule.

2. Your sealed written quotation/tender, in duplicate, should be clearly marked on the envelope:

Written Quotation/Tender for \_\_\_\_\_

The envelope should be addressed to \_\_\_\_\_  
\_\_\_\_\_ and arrive not later than 12:00 noon on (date) \_\_\_\_\_.  
Late written quotations/tenders will not be accepted. Your written quotation/tender will remain open for 90 days from the "Closing Date", and you may consider your written quotation/tender to be unsuccessful if no order is placed with you within these 90 days. You are requested to note that unless Part II of the written quotation/tender form is completed, the written quotation/tender will not be considered.

3. If you are unable or do not wish to quote/tender, it would be appreciated if you return the written quotation/tender form with reason to the above address at your earliest convenience.

4. Written Quotations/Tenders will be accepted on an \* 'overall'/ 'group'/ 'itemised' basis.

Yours sincerely,

( )

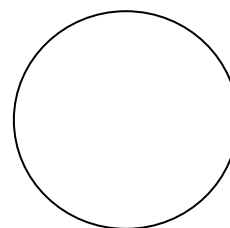
\* Please delete as appropriate

**Written Quotation/Tender Schedule**  
(to be completed in duplicate)

(Columns 4, 5 and 6 to be completed by Supplier)

(1) Item No.	(2) Description/Specification	(3) Quantity Required	(4) Unit Rate (HK\$)	(5) Total Amount (HK\$)	(6) Delivery Offered
	<u>Delivery required</u>				

We/I understand that if we/I fail to supply the stores or services as offered in our/my written quotation/tender upon accepting school's order, we are/I am prepared to pay the price difference to the school if such stores or services are obtained from elsewhere.



Company Chop

Name of Supplier: \_\_\_\_\_

Name and Signature of Person authorized to sign Written Quotation/Tender

Name (in block letters): \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_



(for school's reference only)

**Written Quotation/Tender Form for Stores**

**WRITTEN QUOTATION/TENDER FORM FOR THE SUPPLY OF**  
**(Specify the category of stores)**

Name and Address of School: \_\_\_\_\_

School Ref. No. (to be entered by school): \_\_\_\_\_

Written Quotation/Tender Closing Date and Time (to be entered by school): \_\_\_\_\_

**PART I**

The undersigned hereby offers to supply all or any part of the items described in the written quotation/tender schedule attached with the delivery term quoted therein against the date of a firm order placed by the school at the price or the prices quoted in the written quotation/tender schedule free of all other charges and in accordance with any drawings and/or specifications provided by the school. In so doing, the undersigned acknowledges that all items not otherwise specified shall be in accordance with British Standard specifications where such exist; written quotations/tenders shall REMAIN OPEN FOR 90 DAYS after the Closing Date; and the school is not bound to accept the lowest or any written quotation/tender and reserves the right to accept all or any part of any written quotation/tender within the period during which the written quotation/tender remains open. The undersigned also warrants that his Company's Business Registration and Employees' Compensation Insurance Policy are currently in force and that the items which his Company offers to supply do not to his knowledge infringe any patents.

**PART II**

**RECONFIRMATION OF WRITTEN QUOTATION/TENDER VALIDITY**

With reference to Part I of this written quotation/tender document, it is reconfirmed that the validity of written quotation/tender offered by this company remains open for 90 days from \_\_\_\_\_.

The undersigned also agrees to accept the fact that once the validity of written quotation/tender is reconfirmed, the pre-printed clause specified in the Company's written quotation/tender forms in regard to this nature shall NOT apply.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

Name (in block letters) : \_\_\_\_\_

Signature : \_\_\_\_\_ in the capacity of \_\_\_\_\_  
(state official position e.g. Director, Manager, Secretary)

Duly authorized to sign written quotations/tenders for and on behalf of : -

\_\_\_\_\_

whose registered office is situated at \_\_\_\_\_

\_\_\_\_\_ Hong Kong.

Telephone No. : \_\_\_\_\_

Fax No. : \_\_\_\_\_

(for school's reference only)

**Written Quotation/Tender Form for Services**

WRITTEN QUOTATION/TENDER FORM FOR THE SERVICE OF  
(Specify the category of services)

Name and Address of School: \_\_\_\_\_

School Ref. No. (to be entered by school): \_\_\_\_\_

Written Quotation/Tender Closing Date and Time (to be entered by school): \_\_\_\_\_

**PART I**

The undersigned hereby offers to undertake the service as described in the written quotation/tender schedule within the period of time as specified therein from the date of a firm order placed by the school at the price or prices quoted in the written quotation/tender schedule including labour, materials, all other charges and in accordance with the details provided by the school. In so doing, the undersigned acknowledges that all items not otherwise specified shall be provided in accordance with such details; written quotations/tenders shall REMAIN OPEN FOR 90 DAYS after the Closing Date; and the school is not bound to accept the lowest or any written quotation/tender and reserves the right to accept all or any part of any written quotation/tender within the period during which the written quotations/tenders remain open. The undersigned also warrants that his Company's Business Registration and Employees' Compensation Insurance Policy are currently in force and that the service which his Company offers to undertake will not cause any damage to the school's premises.

**PART II**

**RECONFIRMATION OF WRITTEN QUOTATION/TENDER VALIDITY**

With reference to Part I of this written quotation/tender document, it is reconfirmed that the validity of written quotation/tender offered by this company remains open for 90 days from \_\_\_\_\_.

The undersigned also agrees to accept the fact that once the validity of written quotation/tender is reconfirmed, the pre-printed clause specified in the Company's written quotation/tender forms in regard to this nature shall NOT apply.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

Name (in block letters) : \_\_\_\_\_

Signature : \_\_\_\_\_ in the capacity of \_\_\_\_\_  
(state official position e.g. Director, Manager, Secretary)

Duly authorised to sign written quotations/tenders for and on behalf of : -

\_\_\_\_\_

whose registered office is situated at \_\_\_\_\_

\_\_\_\_\_ Hong Kong.

Telephone No. : \_\_\_\_\_

Fax No. : \_\_\_\_\_

**Annex IV**

(for school's reference only)

**Written Quotation/Tender Summary and Approval Record of**  
**Written Quotation/Tender No. \_\_\_\_\_**  
**for the supply of \_\_\_\_\_ (Stores or Services)**

Name of School : \_\_\_\_\_

School Written Quotation/Tender Reference : \_\_\_\_\_

Date of Issue : \_\_\_\_\_ Date of Closing : \_\_\_\_\_

Date of Approval : \_\_\_\_\_

Validity of Written Quotation/Tender up to : \_\_\_\_\_

Supplier's Name	Offer	No Offer	Received Late	No Reply	Brief Description of Item				Recommendation
					Quantity Required				
					Total Cost				

We certify that we have date-stamped, initialed on and vetted every written quotation/tender

**For written quotation**  
Signature of teacher/administrative staff: \_\_\_\_\_  
Name (in Block Letter): \_\_\_\_\_

Signature of teacher/administrative staff: \_\_\_\_\_  
Name (in Block Letter): \_\_\_\_\_

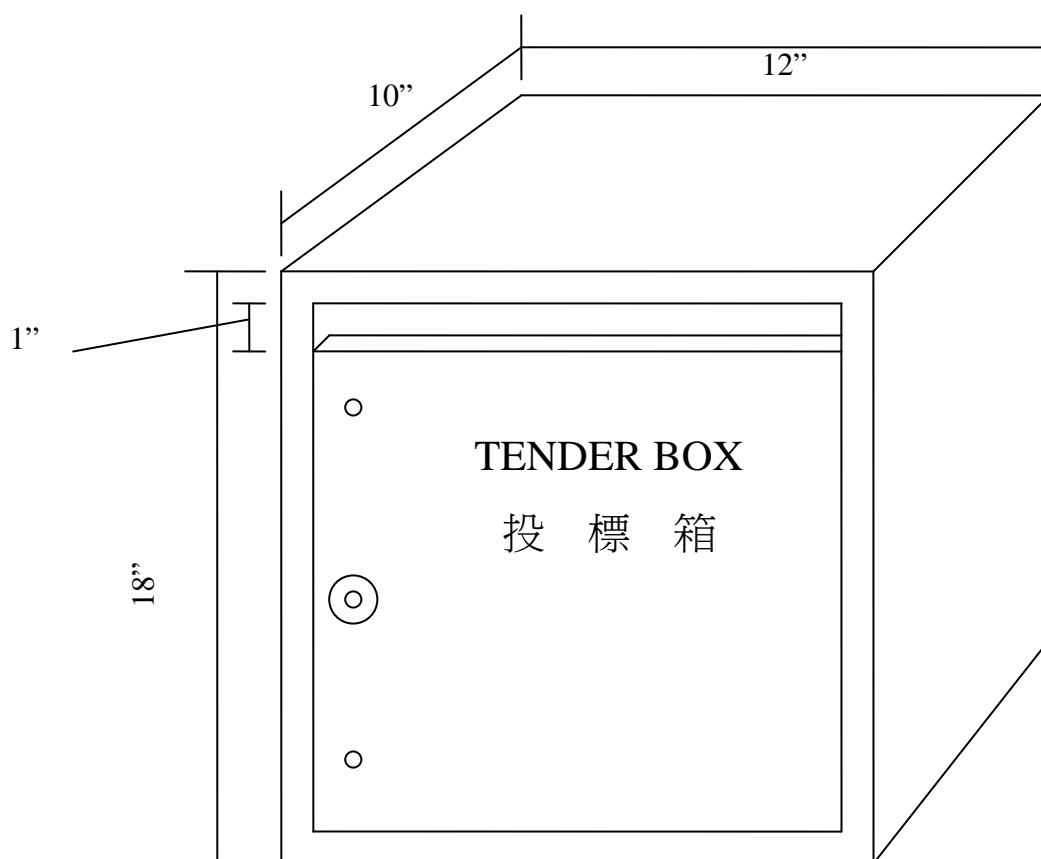
**For tender**  
Signature of TOVC Chairperson: \_\_\_\_\_  
Name (in Block Letter): \_\_\_\_\_

Signature of TOVC Member: \_\_\_\_\_  
Name (in Block Letter): \_\_\_\_\_

<p>I recommend the written quotation/tender as indicated above</p>	<p>Signature of teacher/administrative staff: _____  Name (in Block Letter): _____</p>
<p>* I/We certify that the written quotation/tender vetting procedures are in order and approve the above recommendation  <b>OR</b>  * I/We consider that re-inviting written quotation /re-tendering is required  <b>OR</b>  * I/We disapprove the recommendation because _____  _____  _____  *Please delete as appropriate</p>	<p><b>For written quotation</b>  Signature of Principal: _____  Name (in Block Letter): _____</p> <p><b>For tender</b>  Signature of TAC Chairperson: _____  Name (in Block Letter): _____</p> <p>Signature of TAC Member: _____  Name (in Block Letter): _____</p> <p>Signature of TAC Member: _____  Name (in Block Letter): _____</p> <p>Signature of TAC Member: _____  Name (in Block Letter): _____</p>

(for school's reference only)

**Tender Box Design**



**Size** 12” (W) 18” (H) 10” (D) with an opening of 1” x 12” at the front.

**Material** plywood of 5/8” thick.

**Design** 2 locks and a concave door handle with wordings of “Tender Box”.

### Checklist for Issue and Vetting of Single Quotation/Tender for Supplies of Stores and Services by School Sponsoring Body (SSB)

<b>1. Issue of single quotation/tender</b>		
1.1	Is the procurement by single quotation/tender fully justified? Single quotation/tendering procedures should be used only when open competitive quotation/tender exercise would not be an effective means of obtaining the requisite supplies or services.	Yes/No
1.2	Whether prior approval has been sought from SMC/IMC to adopt single quotation/tendering procedures? The following information should be provided to SMC/IMC for consideration when seeking their approval –  (a) describe the stores and services to be procured;  (b) state the estimated cost; and  (c) explain why single quotation/tender is invited.	Yes/No
1.3	Have officers involved in preparing quotation/tender documents and assessing quotations/tenders declared their interest according to paragraph 5 of the Guidelines?	Yes/No
1.4	Whether the justifications and SMC/IMC's approval for adopting single quotation/tendering procedures have been properly recorded for audit purpose?	Yes/No
1.5	Has the SSB (being invited to submit quotation/tender under the single quotation/tendering arrangement) submitted quotation/tender in the same manner as stipulated in paragraphs 27 to 33 of the Guidelines?	Yes/No
<b>2. Vetting of quotation/tender received from SSB</b>		
2.1	Has the quotation/tender been opened and vetted by the school's quotation/tender opening and vetting authority in accordance with paragraphs 34 to 44 of the Guidelines?	Yes/No
2.2	Whether breakdown of the quoted/tendered price by types of stores and services and by major components or items has been given by the SSB? (Suggested templates for breakdown of the quotation/tender price for provision of management and financial services, information systems and training services are at <b>Annexes VI a, b and c</b> for	Yes/No



	reference).	
2.3	<p>Whether the price of the quotation/tender offer is considered fair and reasonable by SMC/IMC? In doing so, SMC/IMC should substantiate its conclusion by –</p> <p>(a) comparing the offer of SSB against the quotation/tender documents to ensure that the offer of SSB conforms with the specifications and terms and conditions laid down in the quotation/tender documents;</p> <p>(b) comparing the quoted/tendered price and the relevant cost breakdown against the market price of the same or similar products or services, if available, to see that they are comparable; and</p> <p>(c) comparing the quoted/tendered price against the estimated cost submitted to SMC/IMC for consideration when seeking its approval for adopting single quotation/tendering procedures, to ensure that they are comparable.</p> <p><u>Remark:</u> If the answer to this question is “No” (i.e. the quotation/tender received does not comply with the specifications, price unreasonably high or not comparable to market price, terms unacceptable), schools should consider to cancel the quotation/tender exercise and re-invite quotation/re-tender with revised specifications, terms and conditions. Where applicable, open competitive quotation/tender exercise should be considered.</p>	Yes/No
2.4	When price negotiation is required, has the school drawn up a negotiation brief setting out the directions and targets to be achieved as well as the baseline for negotiation? If yes, has prior agreement of SMC/IMC been obtained on the negotiation brief?	Yes/No
2.5	Whether the SMC/IMC’s assessment on and acceptance of the quotation/tender offered by the SSB have been properly recorded for audit purpose?	Yes/No

**Template for Breakdown of Quotation/Tender Price for  
Provision of Management and Financial Services <sup>(Note)</sup>**

Item	Daily Rate \$	No. of Man-days	Total Amount \$
<b>(A) Services A (e.g. Review of Accounting System)</b>			
1) Staff Costs - Senior Professional/Senior Manager - Professional/Manager - Administrative Assistant - Others (please specify)			
2) Reimbursement Charges - Travelling - Photocopying - Others (please specify)			
3) Other costs (please specify)			
<b>Total</b>			
<b>(B) Services B (e.g. Legal Charge for Incorporation)</b>			
1) Staff Costs - Senior Professional/Senior Manager - Professional/Manager - Administrative Assistant - Others (please specify)			
2) Reimbursement Charges - Travelling - Photocopying - Others (please specify)			
3) Other costs (please specify)			
<b>Total</b>			

Note: If the total cost to be incurred by SSB is shared by a number of schools under the same SSB, SSB is required to provide the information on the apportionment basis (e.g. based on the number of classes/students of the respective schools) and the sharing percentage of individual schools as well. The sum of the sharing percentages for the schools concerned should not exceed 100%.

**Template for Breakdown of Quotation/Tender Price for  
Provision of Information Systems <sup>(Note)</sup>**

<b>(A) Hardware</b>					
Name of System/Features	Description	Model No.	Quantity	Unit Rate \$	Total Amount \$
<b>Sub-total</b>					
<b>(B) Software</b>					
Name of System/Features	Description	Model No.	Quantity	Unit Rate \$	Total Amount \$
<b>Sub-total</b>					
<b>(C) Development Cost</b>					
Item	Daily Rate \$	No. of Man-days	Total Amount \$		
1) Staff costs					
- Senior Consultant/Senior Manager					
- Consultant/Manager					
- System Analyst					
- Programmer					
- Others (please specify)					
2) Other costs (please specify)					
<b>Sub-total</b>					
<b>(D) On-going Maintenance and Support</b>					
Item	Description	Total Amount \$			
Hardware	Annual Maintenance Charge				
Software	Annual Licence Fee				
	Annual Maintenance Charge				
<b>Sub-total</b>					
<b>Grand Total (A + B + C + D)</b>					

Note: If the total cost to be incurred by SSB is shared by a number of schools under the same SSB, SSB is required to provide the information on the apportionment basis (e.g. based on the number of classes/students of the respective schools) and the sharing percentage of individual schools as well. The sum of the sharing percentages for the schools concerned should not exceed 100%.

**Template for Breakdown of Quotation/Tender Price for  
Provision of Training Services <sup>(Note)</sup>**

Item	Price \$	No. of classes offered	Total Amount \$
(A) Cost for one class for subject A - training staff cost - training material cost - other overhead (please specify)			
<b>Sub-total</b>			
(B) Cost for one class for subject B - training staff cost - training material cost - other overhead (please specify)			
<b>Sub-total</b>			
<b>Total (A+ B)</b>			

Note: If the total cost to be incurred by SSB is shared by a number of schools under the same SSB, SSB is required to provide the information on the apportionment basis (e.g. based on the number of classes/students of the respective schools) and the sharing percentage of individual schools as well. The sum of the sharing percentages for the schools concerned should not exceed 100%.

## **Maintenance of Estate Aided Schools**

### A Guide to the Services Provided by Housing Department

#### Generally

1. Apart from acting as the landlord for the Government in maintaining the external and structural elements of the estate aided schools, the Housing Department is responsible for providing internal maintenance services to these estate aided schools. The Estate Management Division of the Housing Department is involved in the provision of maintenance services to estate aided schools.
2. Once the estate aided schools have identified the internal major repair works which they require in their annual application for funding in response to the Education Bureau's call-circular, the Housing Department will undertake all the subsequent detailed work of processing the application and, once approved for funding by the Education Bureau, will arrange for the work to be undertaken on-site at the earliest possible time convenient to the schools.

#### Services to School Supervisors' New Applications for Major Repairs

3. The Housing Department's service in respect of applications for funding of internal works for inclusion in the following year's Draft Estimates of the Education Bureau will be as follows :
  - (a) In preparing the major repairs estimates application, the school Supervisors should consider to re-include those rejected items of works in the last year's return, should the situation warrant.
  - (b) The Education Bureau will exercise an initial screening of the applications and will request the Estate Management Division of the Housing Department to provide professional and technical advice together with estimated costs on the proposed major repairs items. The Maintenance Division's staff will contact each school to arrange for site inspections and discussions with the school Supervisor/Principal/Head to establish the full details of the work requested. In the meeting(s), the Estate Management Division's staff will advise the school which items are considered to be "essential", "desirable but not essential" or "not necessary" in the context of keeping the school premises in a state of repair as well as items of improvement.
  - (c) Upon reaching agreement with the school, the Estate Management Division of the Housing Department will provide the Education Bureau with the Estimation Sheet for each estate aided school for budgetary and funding purposes.

#### Approved Major Repairs Works

4. For those works which the Education Bureau has approved to be funded in a certain financial year, the Housing Department will contact the relevant estate aided schools during the month of April/May of that financial year to proceed with the following :
  - (a) Upon receipt of information from the Education Bureau on the approved items of major repairs for individual estate aided school, the Estate Management Division's staff of the

Housing Department will arrange meetings with the school supervisor to agree on the time-tables for implementation of the works.

- (b) As clients, the schools' opinions in relation to colour schemes, choice of materials and design details will be taken into consideration by the Estate Management Division in preparing the works order to the contractor. Generally, the schools' requirements must be fallen within the Housing Department's standard and particular specifications of materials and workmanship.
- (c) During the progress of works, the Estate Management Division's staff will pay regular visits to supervise the contractor and to ensure that works are being undertaken correctly and to programme. The schools are requested not to give instructions directly to the contractor. Should the schools have any opinions, comments or suggestions in relation to the work in progress, they should contact the Estate Management Division's project staff, whose contacting telephone numbers can be obtained during the initial meeting as stated above or from the relevant School Development Officer.
- (d) When the works for individual schools are considered by the Estate Management Division of the Housing Department to be satisfactorily completed, a joint "hand-over" meeting will be arranged with the school Supervisor. If there are outstanding items discovered during the meeting but will not affect the intended use of the completed project, the Estate Management Division's staff will instruct the contractor to complete them within the "maintenance period", which is 6 or 12 months, depending on the contract, counting from the certified completion date of the works.
- (e) All defect as the result of the contractor's poor materials and workmanship will be rectified under the instruction of the project staff of the Estate Management Division. At about one week before the expiry of the maintenance period, a joint site meeting between the school Supervisor, the project maintenance staff and the contractor will be conducted to finalize the list of the defects. However, during the maintenance period, should the school discover any defect that would affect the safety, the project maintenance staff should be informed for immediate attention.
- (f) The Housing Department will be responsible for valuing the contractor's work for the purpose of payments in accordance with the Housing Department's accounting procedures, and the school Supervisor will have no need to be involved in this respect.

#### Repairs by Landlord

5. The school Supervisor should note that the Housing Department, acting as the landlord for the Government, is responsible for upkeeping the external and structural elements of the school premises such as roofing, building fabrics, plumbing and drainage systems and slopes with funds obtained directly from the Government. Should defects have occurred in these areas, immediate report should be made to the Estate Office of the estate in which the estate aided school is situated. As regards external redecoration of the school premises, they will normally be arranged at the same time when the estate in which the school is situated is doing the external redecoration.

### Advisory/Consultant Service

6. At any time, should the school Supervisor have any concern in relation to the safety and the structural soundness of the school building, the Estate Office of the estate in which the school is situated can be contacted for assistance or referral to the Estate Management Division of the Housing Department for professional and technical advice and remedial actions if necessary.

### HD's Services to Estate Aided Schools for Emergency Repairs (ER)

7. In general, school supervisors should make their own arrangement for minor day-to-day repairs in the schools where the costs of the repair works are less than \$8,000 for secondary schools and \$3,000 for primary and special schools. However, there are occasions where the works are of emergency nature or Housing Department's assistance are required to give professional/technical advice on the course of action and extent of repair works to be undertaken. In these cases, the schools will have to complete the prescribed ER application form and forward to Housing Department for follow-up action.
8. Upon receipt of the Emergency Repairs request, Housing Department will arrange for joint site inspection with the school to identify the location of emergency repairs, to assess the condition of the problem area and to propose the course and extent of repair works necessary. Housing Department will then advise Education Bureau on the recommended repair works under the ER category and on the estimated cost of works required.
9. Blanket approval has been granted by Education Bureau for those Emergency Repairs works of cost not exceeding \$200,000. For ER costing more than \$200,000, prior approval from Education Bureau is required. Subject to funding approval by Education Bureau, Housing Department will arrange for the implementation of Emergency Repairs works in accordance with the works programme agreed with the school concerned.
10. If the cost of works does not exceed \$8,000 for secondary schools and \$3,000 for primary and special schools, the school supervisors will be notified for the settlement of the work cost afterwards through Debit Notes issued by the Account Section of the Housing Department.
11. If the Emergency Repairs request is found not of emergency nature and does not warrant urgent repair action, the school is advised to make own arrangement of works, or if appropriate, include the item(s) in the Major Repairs application of the next year.

### Building services works

Fixed/Permanent Installations / Appliances items	Handled and Maintained by	Remarks
1. Fume cupboard fan	contractors  Building Services Maintenance	B.S. Maintenance will supervise and direct Electrical or Fire Services contractors/Ventilation contractors as appropriate.
2. Air intake louvre covered with fire damper (at laboratory)		
3. Facilities wiring for ELVS at laboratory		
4. Stage Light & dimmers control board		
5. Stage Lighting engineering equipment and associated barrel mechanism		
6. Class changing bell system		
7. Call bell		
8. Wall mounted & ceiling fan		
9. Exhaust fan		
10. Incinerator		
11. Electric water heater		
12. Electric clock (Battery operated)		
13. Fire Services Installation		Maintenance/Inspection & Testing to the minimum Fire Services statutory requirements e.g. annual testing
14. Water Pump Installation	Education Bureau	
15. Gas sink water heater		LP or Town Gas appliances to be dealt with by school direct to authorized gas dealer/companies concerned. *
16. Gas cooker		
17. Public Address System		Other appliances to be arranged and operated by school direct.
18. CABD/ETV installation		
19. Other remaining Furniture & Equipment items such as ELVS, TV, cooker, portable electric heater, etc.		RAC minor repair or general routine service e.g. air filter cleaning etc to be dealt with by the school direct. *
20. Room Air Cooler (RAC)		

\* Area engineers and inspectors shall give technical advice/support, upon Education Bureau's request, on major upgrading, repositioning, addition and planned maintenance.



### **Maintenance of Non-estate Aided Schools**

#### A Guide to the Services Provided by Architectural Services Department

##### Generally

1. The Property Services Branch of Architectural Services Department (ArchSD ) is responsible for providing a maintenance service to non-estate aided schools.
2. In response to the annual call- circular from Education Bureau, the schools are to identify the Major Repair (including alteration and improvement) work items and to apply for funding approval from Education Bureau for the implementation of such works. ArchSD will provide assistance in the processing of the applications and upon approval of funds by Education Bureau will arrange for delivery of works in accordance with the work programmes agreed with the respective schools.

##### ArchSD's Services to Schools for Major Repairs (MR)

3. The ArchSD service in respect of applications for funding of works for inclusion in the following year's Education Bureau Draft Estimates will be as follows :
  - (a) On receipt of the proposed work lists from Education Bureau, the district staff of ArchSD will arrange for joint site inspections and discussions with school supervisors to establish the full details of the MR items requested.
  - (b) During inspections and discussions held with schools, ArchSD will give professional and technical advice on the works requested to ensure that the best course of action is adopted to meet the particular needs of the individual school. In the light of ArchSD's advice, the schools may re-consider and/or modify the MR requests.
  - (c) To facilitate EDB in the processing of funding applications, ArchSD is required to recommend and to accord priority of the MR requests by categorizing the items into "essential", "desirable but not essential" and "not necessary" from a technical point of view and in the context of keeping the school premises in good state of repair for its intended purposes.
  - d) Having agreed with the schools on the extent and details of the MR items, ArchSD will prepare cost estimates for all "essential" and "desirable but not essential" items and return the completed MR application forms to Education Bureau for their preparation of Draft Estimates of the annual MR programme and the subsequent funding allocation.

##### Approved Major Repairs Works

4. For those works which Education Bureau has approved to be funded in a certain financial year, the ArchSD service will be as follows:
  - (a) Upon receipt of the funding allocation from Education Bureau on the approved MR works, ArchSD will consult with school supervisors to agree on the works programme to suit the school operational need.

- (b) For straight forward repair items, ArchSD will usually aim to implement works as soon as possible subject to the arrangement made by schools. However, for large scale items, it will be necessary for the works to be executed during long school holidays and also for some works, such as replacement of windows, re-roofing, etc., to be implemented in dry season.
- (c) When the works programme has been agreed, ArchSD will arrange and supervise for the delivery of works in accordance with ArchSD standards and specifications. As the client, the school will be consulted in respect of colour schemes, choice of materials, design details where appropriate. The school supervisors are encouraged to participate in the delivery of MR works.
- (d) For the effective management of the contractors by ArchSD, the schools are advised not to give instructions directly to the contractors on site. Should any extra work or revision to the agreed programme be considered necessary, the schools should liaise with the subject officer in ArchSD for arrangement. Equally, any complaint on the contractor's performance and/or workmanship, etc., should also be made to ArchSD for follow-up actions.
- (e) On completion of the MR works, a hand-over meeting will be arranged (as warranted by the nature and magnitude of the works) and a completion date will be agreed with the school supervisor. Such date will be used as the basis of the "6-month maintenance period" for the works during which time the ArchSD contractors will be responsible for rectification of defects arising as a result of poor workmanship or material.
- (f) As part of the maintenance services, ArchSD will also be responsible for processing payments to the contractors and for the finalization of project accounts. Other than works involving non-school portions, the school supervisors do not have to deal with any payment matters in the delivery of MR works.

#### Advisory/Consultant Service Provided by ArchSD

5. ArchSD provides maintenance services to non-estate aided schools on a response-to-request basis under the categories of MR and ER, and is responsible for the sufficiency of the repair works undertaken on financial allocation from EDB whilst the school supervisors are responsible to ensure the safety and soundness of the school premises.
6. The school supervisors may contact the respective district officers in ArchSD to seek advice on matters of concern in relation to the condition of the school buildings and services. ArchSD will offer such advice on condition that no cost will be incurred by ArchSD in undertaking extensive testing or investigative works to provide such advisory service.
7. Subject to availability of staff resources, ArchSD may also provide additional advisory services on any proposed alteration and/or additional works/facilities from maintenance point of view if the existing building is able to sustain these additional works/facilities. The school supervisors are required to appoint their own Authorized Person (AP) to prepare proper alteration/addition proposals for ArchSD's comments and to ensure the works are being implemented in compliance with the relevant standards and requirements.
8. The school supervisors should note that school buildings are private properties subject to Building Ordinance control and the school authorities shall be fully responsible for their school premises for all legal purposes.

#### ArchSD's Services to Schools for Emergency Repairs (ER)

9. School supervisors are responsible to make their own arrangement for minor day-to-day repairs in the schools where the costs of the repair works required are less than \$8,000 for secondary schools and \$3,000 for primary and special schools. However, there are occasions where ArchSD's assistance are required to give professional/technical advice on the course of action and extent of repair works to be undertaken or where the scope of the repair works costs beyond the above limits. Except in emergency situations, the schools will have to complete the prescribed ER application form and forward to ArchSD for follow-up action.
10. Upon receipt of the ER request, ArchSD will arrange for joint site inspection with the school to identify the location of emergency repairs, to assess the condition of the problem area and to propose the course and extent of repair works necessary. ArchSD will then advise EDB on the recommended repair works under the MR or ER category as appropriate and on the estimated cost of works required.
11. Subject to funding approval by EDB, ArchSD will arrange for the implementation of ER works in accordance with the works programme agreed with the school concerned. There are cases where the emergency situation warrants urgent repair action being undertaken by ArchSD but the cost of works does not exceed \$8,000 for secondary schools and \$3,000 for primary and special schools, the school will be notified for the settlement of the work cost afterwards through Demand Notes issued by the Account Section of ArchSD.
12. When the request for ER works relates to major building and/or slope safety problems, ArchSD will, on consultation with Building Department and/or Geotechnical Engineer where applicable, to decide on the most appropriate action by (i) in consultation with EDB, arranging for the necessary remedial works to be undertaken as temporary or permanent repairs, or (ii) advising the school supervisor to appoint consultant(s) for investigation and implementation of works.
13. For cases where the ER request is found not of emergency nature and does not warrant urgent repair action, the school is advised to make own arrangement of works, or if appropriate, include the item(s) in the MR application of the next year.

**Graduate Teacher Posts in Aided Primary Schools**

The latest information on graduate teacher posts in aided primary schools (including special schools) is available on the “Graduate Teacher Posts in Aided Primary Schools” website in the Education Bureau’s homepage (Home > School Administration and Management > Administration > About School Staff > [Graduate Teacher Posts in Aided Primary Schools](#)).

*(updated on 1 September 2019)*

**Class Size in Aided Special Schools**

The number of students per class in special schools shall not exceed the following levels, except with the permission in writing of the Permanent Secretary for Education:

- (a) Schools for children with physical disability  
10 per class
- (b) Schools for children with hearing impairment  
10 per class
- (c) Schools for children with visual impairment  
12 per class
- (d) Schools for children with visual impairment and intellectual disability  
10 per class
- (e) Schools for children with mild intellectual disability  
15 per class
- (f) Schools for children with moderate intellectual disability  
10 per class
- (g) Schools for children with severe intellectual disability  
8 per class
- (h) Schools for social development  
12 per class
- (i) Hospital schools  
Psychiatric – 8 per class  
Non-psychiatric – Primary : 15 per class  
Secondary : 10 per class

For subsidy purpose, classes operated under the same sponsor in different hospitals will be considered as one single hospital school.

## Guidelines II.1 – 4

Schools may access the following samples on the “Appointment Matters” website in the Education Bureau’s homepage (Home > School Administration and Management > Administration > About School Staff > [Appointment Matters](#)).

- Condition of Service – Teachers in Aided Schools
- Letter of Appointment/Acceptance – Teachers in Aided Schools
- Letter for Resignation/ Retirement of Teaching Staff and Non-teaching Staff
- Certificate of Service

**Qualifications for Appointment of Native-speaking English Teachers (NETs)  
under the Enhanced Native-speaking English Teacher (NET) Scheme in Secondary Schools**

The applicant should be a native-speaker of English (meaning English being the person's native language) or possess native-speaker English competence.

Preference will be given to applicants with experience in teaching English as a second/foreign language.

For appointment in special schools, preference will be given to applicants who have special education training and/or experience in teaching students with special educational needs.

Appointment of native-speaking English teachers (NETs) should be considered according to the following order of priority:

1. Category 1 (to be appointed at Graduate Master/Mistress (GM) rank, MPS pt. 12-33)

- (i) a bachelor's degree in English Language or English Literature or English Studies or Linguistics# or a Modern Language# **OR** a Bachelor in Education degree (major in English or a Modern Language#, but not primary education specialist) obtained after 3 years' full-time study; and
- (ii) a Post-graduate Diploma in Education majoring in English or equivalent; and
- (iii) a Teaching of English as Foreign Language or a Second Language (TEFL/TESL) qualification at least at the diploma level; and
- (iv) at least 1 year's post-graduate experience of teaching English **preferably** as a second or foreign language at secondary level or above.

2. Category 2 (to be appointed at GM rank, MPS pt. 12-33)

- (i) a bachelor's degree in English Language or English Literature or English Studies or Linguistics# or a Modern Language#; **OR** a Bachelor in Education degree (major in English or a Modern Language#, but not primary education specialist) obtained after 3 years' full-time study; and
- (ii) a Post-graduate Diploma in Education majoring in English or equivalent; and
- (iii) at least 1 year's post-graduate experience of teaching English **preferably** as a second or foreign language at secondary level or above.

In the event that candidates meeting the requirements in Category 1 – 2 cannot be recruited, consideration may be given to appoint teachers with the following qualifications:

3. Category 3 (to be appointed at GM rank, MPS pt. 12-33)

- (i) a bachelor's degree in English Language or English Literature or English Studies or Linguistics# or a Modern Language#; and
- (ii) a Post-graduate Diploma in Education or equivalent; and
- (iii) at least 1 year's post-graduate experience of teaching English **preferably** as a second or foreign language at secondary level or above.

4. Category 4 (to be appointed at GM rank, MPS pt. 12-33)

- (i) a bachelor's degree in any subject; and
- (ii) a Post-graduate Diploma in Education majoring in English or equivalent; and
- (iii) at least 1 year's post-graduate experience of teaching English **preferably** as a second or foreign language at secondary level or above.

5. Category 5 (to be appointed at GM rank, MPS pt. 12-33)

- (i) a bachelor's degree in any subject; and
- (ii) a Post-graduate Diploma in Education or equivalent; and
- (iii) a TEFL/TESL qualification **preferably** at diploma level; and
- (iv) at least 1 year's post-graduate experience of teaching English **preferably** as a second or foreign language at secondary level or above.

Note:

# A degree in Linguistics or Modern Languages should be one in which English is the major language studies.



**Qualifications for Appointment of Native-speaking English Teachers (NETs)  
under Native-speaking English Teacher (NET) Scheme in Primary Schools**

The applicant should be a native-speaker of English (meaning English being the person's native language) or possess native-speaker English competence.

Preference will be given to applicants with experience in teaching English as a second/foreign language.

For appointment in special schools, preference will be given to applicants who have special education training and/or experience in teaching students with special educational needs.

Appointment of native-speaking English teachers (NETs) should be considered according to the following order of priority:

1. Category 1 (to be appointed at Assistant Primary School Master/Mistress (APSM) rank, MPS pt. 12-29)

(i) a bachelor's degree in English (i.e. majoring in English Language or English Literature or English Studies or Linguistics# or a Modern Language#); and

(ii) a recognized teacher training qualification in primary education; and

\*(iii) a Teaching of English as a Foreign Language or a Second Language (TEFL/TESL) qualification at least at certificate level.

2. Category 2 (to be appointed at APSM rank, MPS pt. 12-29)

(i) a bachelor's degree in any subject; and

(ii) a recognized teacher training qualification in primary education; and

\*(iii) a TEFL/TESL qualification at least at certificate level.

In the event that candidates meeting the requirements in Category 1 – 2 cannot be recruited, consideration may be given to appoint teachers with the following qualifications:

3. Category 3 (to be appointed at APSM rank, MPS pt. 12-29)

(i) a bachelor's degree in English /any subject; and

(ii) a recognized teacher training qualification; and

\*(iii) a TEFL/TESL qualification at least at certificate level

Note:

\* Candidates who are considered for appointment but do not possess a TEFL/TESL qualification will be required to obtain such qualification at least at certificate level within the first year of their appointment at their own expenses and in their own spare time. This requirement should be pointed out to the candidates concerned and spelt out in the contract of employment.

# A degree in Linguistics or Modern Languages should be one in which English is the major language studies.

**Guidelines on the Duties of Teachers**  
**Appointed under the Enhanced Native-speaking English Teacher (NET) Scheme**  
**in Secondary Schools**

The exact duties of the NET should be determined by the School Principal/Supervisor according to the specific needs of the School. In general, the duties of the NET include the following:

- (i) To be responsible for classroom teaching and assessment;
- (ii) To teach in accordance with the curriculum of the School to which he is appointed under the guidance of the School Principal;
- (iii) To provide support to English Panel Chairperson, including assisting in the curriculum development/adaptation and preparation of teaching materials;
- (iv) To assist in conducting extra-curricular activities relating to the English Language, e.g. speech, drama, debates, choral speaking and extensive reading;
- (v) To assist in running oral activities for students after school;
- (vi) To assist in setting up an English corner in the School where students can come together to practise oral English and read English books under their guidance; and
- (vii) To act as an English Language resource person for other teachers in school, including assisting in school-based teacher development.

**Guidelines on the Duties of Teachers**

**Appointed under the Native-speaking English Teacher (NET) Scheme in Primary Schools**

The exact duties of the NET should be determined by the Principals/Supervisors of the Base School and the Partner School according to the specific needs of the two Schools. In general, the duties of the NET include the following:

1. To undertake teaching duties, developing and trying out good teaching strategies/activities related to the learning, teaching and assessment of English;
2. To provide support for the English Panel, including contributing to school-based curriculum development and professional development of fellow teachers as well as developing and preparing learning/teaching materials;
3. To organize and conduct extra-curricular activities related to the English learning and teaching such as plays/skit performances, school-based English camps, English language days, games, story-telling activities, songs and dances, verse speaking and extensive reading; and if applicable, to contribute to other extra-curricular activities such as IT, art and craft activities and sports;
4. To act as a language policy advisor for the principals and teachers in the Schools; and
5. Where applicable, to play an active role in regional teacher development programmes, including lesson demonstrations and experience-sharing with other teachers.

**Memorandum on**  
**the Terms and Conditions of Service for Appointment as Teacher**  
**under the Enhanced Native-speaking English Teacher (NET) Scheme in Secondary Schools**

- [Note: (1) Any reference to “Government” in this Memorandum is construed as “The Government of the Hong Kong Special Administrative Region”.
- (2) Words and expressions importing the masculine gender include the feminine gender.
- (3) Terms defined in the Letter of Appointment have the same meaning when used herein. ]

**1. Contract and Period of Appointment**

- 1.1 The acceptance by a Native-speaking English Teacher (hereinafter stated as ‘NET’) of the Letter of Appointment and this Memorandum by way of the Letter of Acceptance shall constitute the contract of employment between the School and the NET (the Contract).
- 1.2 The appointment of a NET under the enhanced Native-speaking English Teacher Scheme (hereinafter stated as ‘the Scheme’) is for a period as specified in the Letter of Appointment.

**2. General**

- 2.1 The NET is subject to the provisions of the Prevention of Bribery Ordinance (Cap. 201).
- 2.2 The NET appointed is not eligible for promotion in the School as specified in the Letter of Appointment under the Enhanced NET Scheme.
- 2.3 The NET is required to be examined by an approved medical practitioner and may begin service only on being certified medically fit by such approved practitioner. Any cost of the medical examination shall be borne by the NET.
- 2.4 If a medical officer duly authorized by the Government to examine the NET certifies in writing that in his opinion the NET is incapable of rendering efficient service in Hong Kong by reason of any infirmity of mind or body, then that NET shall forthwith be removed from office and shall be repatriated at his own expense.
- 2.5 For NETs coming from abroad:

The above offer for employment is conditional upon the NET having obtained, prior to his arrival in Hong Kong, from the Director of Immigration of the Government an employment visa allowing him to work for the School as specified in the Letter of Appointment and to stay in Hong Kong for an initial period of at least one year. The School shall not be liable for any loss or damage whatsoever should the NET’s application be turned down by the Director of Immigration.

For NETs already working in Hong Kong for another employer:

The above offer for employment is conditional upon the NET having obtained, prior to commencement of the Contract, an approval from the Director of Immigration of the Government allowing him to work for the School as specified in the Letter of Appointment and to continue to stay in Hong Kong for at least one year. The School shall not be liable for any loss or damage whatsoever should the NET's application be turned down by the Director of Immigration.

- 2.6 Any cost incurred from the application for employment visa in Hong Kong shall be borne by the NET.

### **3. Duties**

- 3.1 The NET shall be responsible to the Principal/Supervisor of the School and perform such duties as may be assigned to him by the Principal/Supervisor of the School.
- 3.2 The NET shall obey and comply with all the rules of the School to which he is appointed.
- 3.3 The normal hours of work for the NET is the school hours of the School to which he is appointed. However, hours of work may vary depending upon the needs of the School.
- 3.4 The NET may be required to assist with extra-curricular activities and other school duties including duties outside school hours and during school holidays at the discretion of the Principal/Supervisor of the School. The Principal/Supervisor may also require the NET to attend educational courses or seminars outside school hours.

### **4. Work Outside School**

- 4.1 The NET must not undertake paid outside work outside normal working hours or any paid or unpaid outside work during normal working hours except with the prior written approval of the School Supervisor. Approval, if given, may be withdrawn at any time if the work is found to be interfering with the NET's duties and, in any case, shall be subject to half-yearly review.
- 4.2 The NET who is a foreign national being approved by the Director of Immigration to stay in Hong Kong for employment purposes should also obtain prior approval from the Director of Immigration before taking up part-time jobs.

### **5. Salary and Increments**

- 5.1 Full salary will be paid from the date of assumption of duty.
- 5.2 Salary is paid monthly in arrears in Hong Kong dollars.
- 5.3 Emoluments are subject to local taxation.
- 5.4 The pay scale for NET is equivalent to Point 12 to 33 of the Master Pay Scale.

- 5.5 On appointment, the NET will be paid a salary stated in the Letter of Appointment or an amount calculated in accordance with the relevant guidelines issued by the Education Bureau. This salary will be a rate equivalent to an entry pay point on the appropriate pay scale introduced on 1 April 2000 for appointment on starting salaries (the reference pay scale), or a pay point on the increment pay scale as appropriate. The reference pay scale was not subject to the civil service pay adjustments in 2001 and 2002, but is subject to reductions from 1 January 2004 and 1 January 2005 in accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance.
- 5.6 For a NET who is remunerated on the reference pay scale, subject to paragraph 5.7 below, he will, on completion of one year's service, move to the next higher pay point on the appropriate increment pay scale (which is the pay scale for NETs not remunerated on starting salaries) and progress along the increment pay scale in subsequent years. For a NET who is remunerated on the increment pay scale, subject to paragraph 5.7 below, he will progress along the increment pay scale. The relevant pay scale is subject to reductions from 1 January 2004 and 1 January 2005 in accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance. It may subsequently be further adjusted under the annual pay adjustment exercise. Such adjustment may take the form of a pay increase, pay freeze or pay reduction.
- 5.7 A NET may be granted an increment only if his performance at work (including conduct, diligence and efficiency) has been satisfactory during the preceding year.
- 5.8 Increments of salary, if any, will be payable from the NET's incremental date which is determined, in accordance with his date of first appointment, as follows -
- If he assumes duty between the 1st and the 15th of the month, his incremental date will be the 1st of that month ; or
  - If he assumes duty between the 16th and the end of the month, his incremental date will be the 1st of the following month.
- 5.9 Increments are not automatic. Increments will not be granted or their payment stopped or deferred if the Principal/Supervisor of the School is not satisfied with the performance of the NET.
- 5.10 For part of a month, salaries will be calculated as follows -

$$\frac{\text{No. of days of service in the month}}{\text{Total no. of days in that month}} \times \text{monthly salary}$$

- 5.11 Salary shall continue to be paid during school holidays, subject to the conditions specified below for the payment of salary on termination of service.
- 5.12 On first appointment in Hong Kong and on application by the NET, the School Principal/Supervisor may approve an advance of salary not exceeding 2 months' of the NET's salary. The salary advance shall be repaid in 6 monthly instalments to be deducted from the NET's salary within the first 6 months following the month in which the advance is made.
- 5.13 Except as otherwise provided in this Memorandum, this appointment does not entitle the NET to any allowance, perquisite or pension benefit.

- 5.14 The School may require a NET to refund any amount that it may have overpaid to the NET; any advances of salary; any charges that the NET may have incurred in respect of any facilities or benefits provided to the NET or his family by the School including, but not limited to, those facilities or benefits referred to in this Memorandum, and any other debt whatsoever that may arise and become due from the NET to the School either during his service or upon his leaving such service.

## **6. Gratuity**

- 6.1 Upon satisfactory completion of the full period of appointment required by the Letter of Appointment, or if the NET's service is terminated by the School for reasons other than unsatisfactory performance or conduct of the NET, the NET will be paid a gratuity for the period of service completed, including school holidays taken within the period of service. Specifically, the gratuity will be granted only if the School is satisfied that the NET's performance and conduct during the period of service has been satisfactory.
- 6.2 The gratuity payable for the Contract will be the sum which, when added to the employer's contribution to the MPF scheme, equals to the rate as specified in the Letter of Appointment.
- 6.3 The School may withhold the grant of gratuity if the NET is being subject to any disciplinary or criminal proceedings or investigation into any acts which may affect the grant of gratuity.
- 6.4 An interim gratuity covering the completed period of resident service is normally payable not earlier than four clear working days before the commencement of the summer vacation immediately prior to the expiry of the Contract. The residual contract gratuity relating to the period of the summer vacation immediately prior to the expiry of the Contract will be paid on the expiry of the Contract.
- 6.5 In the event of the NET's death during the period of appointment, the amount of gratuity payable will be paid to his estate.
- 6.6 The gratuity attracts salaries tax.
- 6.7 For the avoidance of doubt, if the NET resigns or is dismissed, or his service is terminated for reasons of unsatisfactory performance or conduct, he will not be granted any gratuity.
- 6.8 In circumstances where a gratuity is paid to the NET in the mistaken belief that he has -
- (a) satisfactorily completed his agreement; or
  - (b) not been convicted of any offence that if determined on its own fact, would have led to the NET's dismissal from the service during and in respect of his employment with the School,
- the School shall be entitled, without affecting its other rights, to recover from the NET the whole or part of the gratuity commensurate with all the circumstances of the case including the unsatisfactory nature of the NET's service and the seriousness of the offence on his part. Such right of the School shall survive the cessation of the Contract.

## **7. Mandatory Provident Fund**

- 7.1 The School will arrange to make contributions for the NET to a registered mandatory provident fund scheme (MPF scheme) in accordance with the provisions of the Mandatory Provident Fund Schemes Ordinance (Cap. 485) (MPFSO), unless one of the exemptions specified in the MPFSO is applicable to the NET.
- 7.2 If no exemption is applicable and the NET is registered to an MPF scheme, the School will, for each contribution period (as defined in the MPFSO) -
- (a) make the employer's mandatory contribution as determined in accordance with the MPFSO to the trustee of the MPF scheme, and
  - (b) deduct from the NET's relevant income (as defined in the MPFSO) the employee's mandatory contribution as determined in accordance with the MPFSO.
- Both the employer's mandatory contribution and the NET's mandatory contribution will be paid to the trustee of the MPF scheme and the accrued benefits so derived will be fully and immediately vested with the NET in accordance with the MPFSO.
- 7.3 In the event that the NET's mandatory contributions in respect of his relevant income derived from the Contract has not been deducted from the NET's relevant income before the expiry or cessation of the Contract, the School shall be entitled to -
- (a) deduct from the NET's relevant income under other employment contracts/agreements with the School the employee's mandatory contribution which should have been deducted from the NET's relevant income under this Contract; or
  - (b) deduct such NET's mandatory contribution from any other moneys owed from the School to the NET; or
  - (c) require the NET to pay to the School such employee's mandatory contribution for onward transmission to the NET's account under the MPF Scheme.

Such right of the School shall survive the cessation of the Contract.

## **8. Eligibility for Fringe Benefits**

A NET whose normal place of residence is outside Hong Kong will be eligible for those benefits referred to in paragraphs 9, 10, 11 and 12 in accordance with the regulations relating to the provision of such benefits and the regulations relating to the prevention of double benefits. The Secretary for Education shall be the authority in determining whether a NET's normal place of residence is outside Hong Kong.

## **9. Passage**

The NET and his family will be reimbursed the expenses on economy class air tickets from and to country of origin by the most direct route for each contract.

## **10. Baggage Allowance**

- 10.1 Subject to paragraph 17, the NET will be reimbursed for his travelling baggage expenses in the following circumstances:
- (a) when he travels to Hong Kong on appointment for his first NET contract and no allowance will be provided for subsequent contracts; and
  - (b) when he leaves Hong Kong for good after finishing a NET contract, be it the first contract or any subsequent contract.

10.2 A NET who has satisfactorily completed one or more NET contracts in this School or in



other schools but fails to complete his current NET contract on grounds other than unsatisfactory performance or conduct may be granted baggage allowance for the contract(s) he has previously completed when he leaves Hong Kong for good.

10.3 The present maximum rate for outward passage to Hong Kong is HK\$1,300 for single teacher and HK\$5,000 for married teacher accompanied by spouse and/or children. For homebound passage, the current maximum rate is HK\$3,300 for the former and HK\$6,500 for the latter.

10.4 All claims for reimbursement must be supported by originals of the receipts concerned.

## **11. Special Allowance**

The NET may be eligible for a monthly allowance of HK\$ 10,500 which rate is fixed over the contract period. The rate of the allowance is subject to adjustment according to the prevailing rate upon the NET entering into further employment under the Enhanced NET Scheme.

## **12. Medical Allowance**

Medical allowance is provided as reimbursement for the NET to take out medical insurance within the contract period. The present maximum rate of allowance is HK\$ 1,400 per year for a single appointee and HK\$ 5,400 per year for a married appointee accompanied by spouse and/or children and on condition that the spouse and/or children are included in the insurance policy. The payment will be made on a yearly basis upon application. If the coverage period of the insurance begins before or/and extends beyond the NET's contract period, reimbursement of the medical insurance premium will be made on a pro-rata basis, up to the maximum rate.

## **13. Leave Entitlement**

13.1 Subject to the submission of an acceptable medical certificate issued by a registered medical practitioner, a NET may be given on appointment up to 28 days sick leave, and on completion of each succeeding year of service a further 48 days. The maximum balance which may be accumulated shall be 168 days. Grant of paid sick leave and special tuberculosis leave shall be in accordance with the rules governing such leave in the relevant Code of Aid for Secondary Schools/Special Schools\*.

- 13.2 A female NET with not less than 40 weeks of continuous service immediately before the date of commencement of her maternity leave will be entitled to full pay of up to 10 weeks for her absence during her maternity leave. Subject to the submission of an acceptable medical certificate, maternity leave with full pay or no pay may be granted in accordance with the rules governing such leave in the relevant Code of Aid for Secondary Schools/Special Schools\*.
- 13.3 Subject to the approval of the Management Committee of the School and the rules governing such leave in the relevant Code of Aid for Secondary Schools/Special Schools\*, special leave with pay for a maximum of 2 days per school year may be granted for the NET to attend to urgent private affairs of grave importance.
- 13.4 Subject to the recommendation of the Management Committee of the School and the rules governing such leave in the relevant Code of Aid for Secondary Schools/Special Schools\*, the Permanent Secretary for Education may approve the grant of no-pay leave to a NET.
- 13.5 The NET shall be granted a terminal leave in the school summer vacation at the end of the Contract and each renewed contract (if any).

\* Delete as appropriate

#### **14. Resignation**

- 14.1 The NET may terminate his service by giving the School one calendar month's notice in writing of his intention to resign or one month's salary in lieu of notice.
- 14.2 Upon his resignation, the NET forfeits all rights and benefits in respect of the Contract.
- 14.3 The NET who resigns will be required to refund to the School the amount paid for passages and other benefits as detailed in paragraph 17.

#### **15. Termination of Contract**

- 15.1 The Management Committee of the School may terminate the service of the NET by giving him one calendar month's notice in writing or one month's salary in lieu of notice.
- 15.2 If at any time a Government medical officer, or a consulting physician who acts on behalf of the School, certifies that the NET is incapable by reason of any infirmity of mind or body of rendering further efficient service, his service will be terminated forthwith.
- 15.3 Upon termination of appointment, the NET will be required to refund to the School the amount paid for passages and other benefits as detailed in paragraph 17.
- 15.4 Upon termination of service by the School, the NET forfeits all rights and benefits in respect of the Contract, except for those as provided for in paragraph 6.1.

## **16. Dismissal or Punishment for Misconduct, etc.**

- 16.1 The NET is liable to disciplinary punishment (including dismissal without notice or payment in lieu) by the School if he neglects or willfully refuses to perform his duties or in any manner misconducts himself or is convicted of a criminal offence.
- 16.2 Upon dismissal, the NET forfeits all rights and benefits in respect of the Contract.
- 16.3 Upon dismissal, the NET will be required to refund to the School the amount paid for passages and other benefits as detailed in paragraph 17.

## **17. Refund of Passages and Other Benefits on Resignation or Termination of Appointment**

- 17.1 If the NET resigns or has his contract terminated within the first 12 months of the Contract period (the Contract being the first contract), he will be required to refund to the School:-
  - (a) the baggage allowance paid to him; and
  - (b) the cost for outward passage to Hong Kong provided for him and his family.
- 17.2 If the NET resigns or has his Contract terminated within the first 12 months of the Contract period (the Contract being a subsequent contract), he will be required to refund to the School the cost of the outward passages to Hong Kong provided for him and his family for that contract.
- 17.3 If the NET resigns or has his Contract terminated during the second year of the Contract period, he will not be required to make refund for the baggage allowance and passage cost.
- 17.4 If the NET resigns or has his Contract terminated before the Contract period expires, he is liable to repay to the School the outstanding balance of any recoverable advance of salary in one lump sum.

## **18. Conditions for Payment of Salary on Commencement or Termination of Appointment**

- 18.1 Salary shall be paid from the date of assumption of full duties and shall cease immediately after the last day of performance of full duties except as provided below.
- 18.2 A NET with service of one academic year or more without a break and his appointment terminates, with due notice given, on a date no earlier than the beginning of
  - (a) the major school holidays (i.e. Christmas, Chinese New Year and Easter Holidays) will be paid to the end of the school holidays;
  - (b) the summer vacation will be paid to the end of August or end of contract, whichever is earlier.
- 18.3 A NET with service of less than one academic year but more than 59 days and his appointment terminates, with due notice given, on a date no earlier than the beginning of
  - (a) the major school holidays (i.e. Christmas, Chinese New Year and Easter Holidays) will be paid to the end of the school holidays;
  - (b) the summer vacation will be paid to the end of July.
- 18.4 A NET with service of 59 days or less shall be paid up to and including the last day of duty.

## **19. Injury and Death Benefits**

The NET will be eligible for statutory compensation for duty-related injuries or duty-related death in accordance with the Employees' Compensation Ordinance (Cap. 282).

## **20. Further Employment**

- 20.1 The offer of further employment beyond the current Contract is solely at the discretion of the School. The School is not obliged to give any reason for not offering further appointment and there should be no presumption that further appointment will be offered.
- 20.2 If the NET so requests, the School will inform him in writing whether it intends to offer him further employment on contract, subject to satisfactory completion of his current Contract. Such a request shall be made at least six months before the expiry of his current Contract. Otherwise, it will be assumed that the NET does not wish to apply for further employment and will leave the service upon expiry of his current Contract.
- 20.3 Any further appointment, if offered, shall be for such period and on such terms and conditions, including salary, as may be offered by the School. The School is not obliged to refer to the terms and conditions, including salary, of the current Contract in the offer of terms and conditions, including salary, for further appointment.
- 20.4 Any request or application for further appointment on contract shall be considered and processed in accordance with the arrangements and criteria prevailing at the time of such application.

## **21. Other Conditions**

[Other conditions may be added here provided that they are in conformity with the provisions of the Education Ordinance, the Employment Ordinance and their subsidiary legislations, the relevant Code of Aid, and the instructions as the Secretary for Education may from time to time issue]

\*\*\*\*\*

**Memorandum on**  
**the Terms and Conditions of Service for Appointment as Teacher**  
**under the Native-speaking English Teacher (NET) Scheme in Primary Schools**

- [Note: (1) Any reference to “Government” in this Memorandum is construed as “The Government of the Hong Kong Special Administrative Region”.
- (2) Words and expressions importing the masculine gender include the feminine gender.
- (3) Terms defined in the Letter of Appointment have the same meaning when used herein. ]

**1. Contract and Period of Employment**

- 1.1 The acceptance by a Native-speaking English Teacher (hereinafter stated as ‘NET’) of the Letter of Appointment and this Memorandum by way of the Letter of Acceptance shall constitute the contract of employment between the Base School and the NET (the Contract).
- 1.2 The appointment of a NET under the NET Scheme in Primary Schools (hereinafter stated as “the Scheme”) is for a period as specified in the Letter of Appointment.

**2. Qualifications Requirement**

According to the qualification requirements for appointment of NETs in primary schools promulgated in the Education Circular Memorandum No. 55/2004 dated 23 March 2004, a NET who does not possess a Teaching of English as a Foreign Language or a Teaching of English as a Second Language (TEFL/TESL) qualification is required to obtain a TEFL/TESL qualification at least at certificate level within the first twelve months of his employment at his own expenses and in his own spare time. For details concerning whether the TEFL/TESL qualifications obtained by a NET are up to the standard, please refer to the Education Bureau Circular No. 12/2003 on Teaching of English as a Second/Foreign Language Qualification.

**3. General**

- 3.1 The NET is subject to the provisions of the Prevention of Bribery Ordinance (Cap. 201).
- 3.2 The NET appointed is not eligible for promotion in both the Base School and the Partner School as specified in the Letter of Appointment under the NET Scheme in primary schools.
- 3.3 The NET is required to be examined by an approved medical practitioner and may begin service only on being certified medically fit by such approved practitioner. Any cost of the medical examination shall be borne by the NET.
- 3.4 If a medical officer duly authorized by the Government to examine the NET certifies in writing that in his opinion the NET is incapable of rendering efficient service in Hong Kong by reason of any infirmity of mind or body, then that NET shall forthwith be removed from office and shall be repatriated at his own expense.
- 3.5 For NETs coming from abroad:

The above offer for employment is conditional upon the NET having obtained, prior to his arrival in Hong Kong, from the Director of Immigration of the Government an employment visa allowing him to work for the two Schools as specified in the Letter of Appointment and to stay in Hong Kong for an initial period of at least one year. The

Schools shall not be liable for any loss or damage whatsoever should the NET's application be turned down by the Director of Immigration.

For NETs already working in Hong Kong for another employer:

The above offer for employment is conditional upon the NET having obtained, prior to commencement of the Contract, an approval from the Director of Immigration of the Government allowing him to work for the two Schools as specified in the Letter of Appointment and to continue to stay in Hong Kong for at least one year. The Schools shall not be liable for any loss or damage whatsoever should the NET's application be turned down by the Director of Immigration.

- 3.6 Any cost incurred from the application for employment visa in Hong Kong shall be borne by the NET.

#### **4. Duties**

- 4.1 The NET shall be responsible to the Principals/Supervisors of both the Base School and the Partner School and perform such duties as may be assigned to him by the Principals/Supervisors of the two Schools.
- 4.2 The NET shall obey and comply with all the rules of the Schools to which he is appointed.
- 4.3 The normal hours of work for the NET is the school hours of the Schools in which he works. However, hours of work may vary depending upon the needs of the Schools.
- 4.4 The NET may be required to assist with extra-curricular activities and other school duties including duties outside school hours and during school holidays at the discretion of the Principals/Supervisors of the Schools. The Principals/Supervisors may also require the NET to attend educational courses or seminars outside school hours.

#### **5. Work Outside School**

- 5.1 The NET must not undertake paid outside work outside normal working hours or any paid or unpaid outside work during normal working hours except with the prior written approval of the Supervisor of the Base School in consultation with the Supervisor of the Partner School. Approval, if given, may be withdrawn at any time if the work is found to be interfering with the NET's duties and, in any case, shall be subject to half-yearly review.
- 5.2 The NET who is a foreign national being approved by the Director of Immigration to stay in Hong Kong for employment purposes should also obtain prior approval from the Director of Immigration before taking up part-time jobs.

#### **6. Salary and Increments**

- 6.1 Full salary will be paid from the date of assumption of duty.
- 6.2 Salary is paid monthly in arrears in Hong Kong dollars.
- 6.3 Emoluments are subject to local taxation.
- 6.4 The pay scale for NET is equivalent to Point 12 to 29 / 24\* of the Master Pay Scale.
- 6.5 On appointment, the NET will be paid a salary as stated in the Letter of Appointment or an amount calculated in accordance with the relevant guidelines issued by the Education Bureau. This salary will be a rate equivalent to an entry pay point on the appropriate pay scale introduced on 1 April 2000 for appointment on starting salaries (the reference pay scale), or a pay point on the increment pay scale as appropriate. The reference pay scale was not subject to the civil service pay adjustments in 2001 and 2002, but is subject to reductions from 1 January 2004 and 1 January 2005 in

accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance.

- 6.6 For a NET who is remunerated on the reference pay scale, subject to paragraph 6.7 below, he will, on completion of one year's service, move to the next higher pay point on the appropriate increment pay scale (which is the pay scale for NETs not remunerated on starting salaries) and progress along the increment pay scale in subsequent years. For a NET who is remunerated on the increment pay scale, subject to paragraph 6.7 below, he will progress along the increment pay scale. The relevant pay scale is subject to reductions from 1 January 2004 and 1 January 2005 in accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance. It may subsequently be further adjusted under the annual pay adjustment exercise. Such adjustment may take the form of a pay increase, pay freeze or pay reduction.
- 6.7 A NET may be granted an increment only if his performance at work (including conduct, diligence and efficiency) has been satisfactory during the preceding year.
- 6.8 Increments of salary, if any, will be payable from the NET's incremental date which is determined, in accordance with his date of first appointment, as follows -
- (a) If he assumes duty between the 1st and the 15th of the month, his incremental date will be the 1st of that month; or
- (b) If he assumes duty between the 16th and the end of the month, his incremental date will be the 1st of the following month.
- 6.9 Increments of salary are not automatic. Increments will not be granted or their payment will be stopped or deferred if the Principals/Supervisors of the Schools are not satisfied with the performance of the NET.
- 6.10 For part of a month, salary will be calculated as follows -

$$\frac{\text{No. of days of service in the month}}{\text{Total no. of days in that month}} \times \text{monthly salary}$$

- 6.11 Salary shall continue to be paid during school holidays, subject to the conditions specified below for the payment of salary on termination of service.
- 6.12 On first appointment in Hong Kong and on application by the NET, the Principal/Supervisor of the Base School may approve an advance of salary not exceeding 2 months' of the NET's salary. The salary advance shall be repaid in 6 monthly instalments to be deducted from the NET's salary within the first 6 months following the month in which the advance is made.
- 6.13 Except as otherwise provided in this Memorandum, this appointment does not entitle the NET to any allowance, perquisite or pension benefit.
- 6.14 The Base School may require a NET to refund any amount that it may have overpaid to the NET; any advances of salary; any charges that the NET may have incurred in respect of any facilities or benefits provided to the NET or his family by the Base School or the Partner School including, but not limited to, those facilities or benefits referred to in this Memorandum, and any other debt whatsoever that may arise and become due from the NET to the Schools either during his service or upon his leaving such service.

## **7. Gratuity**

- 7.1 Upon satisfactory completion of the full period of service required by the Letter of Appointment, or if the NET's service is terminated by the School for reasons other than

unsatisfactory performance or conduct of the NET, the NET will be paid a gratuity for the period of service completed, including school holidays taken within the period of service. Specifically, the gratuity will be granted only if both the Base School and the Partner School are satisfied that the NET's performance and conduct during the period of service has been satisfactory.

- 7.2 The gratuity payable for the Contract will be the sum which, when added to the employer's contribution to the MPF scheme, equals to the rate as specified in the Letter of Appointment.
- 7.3 The Base School may withhold the grant of gratuity if the NET is being subject to any disciplinary or criminal proceedings or investigation into any acts which may affect the grant of gratuity.
- 7.4 An interim gratuity covering the completed period of resident service is normally payable not earlier than four clear working days before the commencement of the summer vacation immediately prior to the expiry of the Contract. The residual contract gratuity relating to the period of summer vacation immediately prior to the expiry of the Contract will be paid on the expiry of the Contract.
- 7.5 In the event of the NET's death during the period of appointment, the amount of gratuity payable will be paid to his estate.
- 7.6 The gratuity attracts salaries tax.
- 7.7 For the avoidance of doubt, if the NET resigns or is dismissed, or his service is terminated for reasons of unsatisfactory performance or conduct, he will not be granted any gratuity.
- 7.8 In circumstances where a gratuity is paid to the NET in the mistaken belief that he has -
  - (a) satisfactorily completed his agreement; or
  - (b) not been convicted of any offence that if determined on its own fact, would have led to the NET's dismissal from the service during and in respect of his employment with the Schools,

the Schools shall be entitled, without affecting its other rights, to recover from the NET the whole or part of the gratuity commensurate with all the circumstances of the case including the unsatisfactory nature of the NET's service and the seriousness of the offence on his part. Such right of the Base School shall survive the cessation of the Contract.

## **8. Mandatory Provident Fund**

- 8.1 The Base School will arrange to make contributions for the NET to a registered mandatory provident fund scheme (MPF scheme) in accordance with the provisions of the Mandatory Provident Fund Schemes Ordinance (Cap. 485) (MPFSO), unless one of the exemptions specified in the MPFSO is applicable to the NET.
- 8.2 If no exemption is applicable and the NET is registered to an MPF scheme, the Base School will, for each contribution period (as defined in the MPFSO) -
  - (a) make the employer's mandatory contribution as determined in accordance with the MPFSO to the trustee of the MPF scheme, and
  - (b) deduct from the NET's relevant income (as defined in the MPFSO) the employee's mandatory contribution as determined in accordance with the MPFSO.

Both the employer's mandatory contribution and the NET's mandatory contribution will be paid to the trustee of the MPF scheme and the accrued benefits so derived will be fully and immediately vested with the NET in accordance with the MPFSO.



8.3 In the event that any of the NET's mandatory contributions in respect of his relevant income derived from the Contract has not been deducted from the NET's relevant income before the expiry or cessation of the Contract, the Base School shall be entitled to -

- (a) deduct from the NET's relevant income under other employment contracts/agreements with the Base School the employee's mandatory contribution which should have been deducted from the NET's relevant income under this Contract; or
- (b) deduct such NET's mandatory contribution from any other moneys owed from the Base School to the NET; or
- (c) require the NET to pay to the Base School such employee's mandatory contribution for onward transmission to the NET's account under the MPF Scheme.

Such right of the Base School shall survive the cessation of the Contract.

## **9. Eligibility for Fringe Benefits**

The NET whose normal place of residence is outside Hong Kong will be eligible for those benefits referred to in paragraphs 10, 11, 12 and 13 in accordance with the regulations relating to the provision of such benefits and the regulations relating to the prevention of double benefits. The Secretary for Education shall be the authority in determining whether a NET's normal place of residence is outside Hong Kong.

## **10. Passage**

The NET and his family will be reimbursed the expenses on economy class air tickets from and to country of origin by the most direct route for each contract.

## **11. Baggage Allowance**

11.1 Subject to paragraph 10, the NET will be reimbursed for his travelling baggage expenses in the following circumstances:

- (a) when he travels to Hong Kong on appointment under his first NET contract and no allowance will be provided for subsequent contracts; and
- (b) when he leaves Hong Kong for good after finishing a NET contract, be it the first contract or any subsequent contract.

11.2 A NET who has satisfactorily completed one or more NET contracts in the Schools or in other schools but fails to complete his current NET contract on grounds other than unsatisfactory performance or conduct may be granted baggage allowance for the contract(s) he has previously completed when he leaves Hong Kong for good.

11.3 The present maximum rate for outward passage to Hong Kong is HK\$1,300 for single teacher and HK\$5,000 for married teacher accompanied by spouse and/or children. For homebound passage, the current maximum rate is HK\$3,300 for the former and HK\$6,500 for the latter.

11.4 All claims for reimbursement must be supported by originals of the receipts concerned.

## **12. Special Allowance**

The NET may be eligible for a monthly allowance of HK\$ 10,500 which rate is fixed over the contract period. The rate of the allowance is subject to adjustment according to the prevailing rate upon the NET entering into further employment under the NET Scheme in primary

schools.

### **13. Medical Allowance**

Medical allowance is provided as reimbursement for the NET to take out medical insurance within the Contract period. The present maximum rate of allowance is HK\$ 1,400 per year for a single appointee and HK\$ 5,400 per year for a married appointee accompanied by spouse and/or children and on condition that the spouse and/or children are included in the insurance policy. The payment will be made on a yearly basis upon application. If the coverage period of the insurance begins before or/and extends beyond the NET's Contract period, reimbursement of the medical insurance premium will be made on a pro-rata basis, up to the maximum amount specified above.

### **14. Leave Entitlement**

- 14.1 Subject to the submission of an acceptable medical certificate issued by a registered medical practitioner, a NET may be given on appointment up to 28 days sick leave, and on completion of each succeeding year of service a further 48 days. The maximum balance which may be accumulated shall be 168 days. Grant of paid sick leave and special tuberculosis leave shall be in accordance with the rules governing such leave in the relevant Code of Aid for Primary Schools/Special Schools\*.
- 14.2 A female NET with not less than 40 weeks of continuous service immediately before the date of commencement of her maternity leave will be entitled to full pay of up to 10 weeks for her absence during her maternity leave. Subject to the submission of an acceptable medical certificate, maternity leave with full pay or no pay may be granted in accordance with the rules governing such leave in the relevant Code of Aid for Primary Schools/Special Schools\*.
- 14.3 Subject to the approval of the Management Committee of the Base School and the rules governing such leave in the relevant Code of Aid for Primary Schools/Special Schools\*, special leave with pay for a maximum of 2 days per school year may be granted for the NET to attend to urgent private affairs of grave importance.
- 14.4 Subject to the recommendation of the Management Committee of the Base School and the rules governing such leave in the relevant Code of Aid for Primary Schools/Special Schools\*, the Permanent Secretary for Education may approve the grant of no-pay leave to a NET.
- 14.5 If part or the whole period of the sick leave/tuberculosis leave/maternity leave/special/no pay leave falls within duty days of the NET at the Partner School, the application and medical certificate, where appropriate, should be submitted through the Partner School to the Base School for approval.
- 14.6 The NET shall be granted a terminal leave in the school summer vacation at the end of the Contract and each renewed contract (if any).

\* Delete as appropriate

### **15. Resignation**

- 15.1 The NET may terminate his service by giving the Base School one calendar month's notice in writing of his intention to resign or one month's salary in lieu of notice.
- 15.2 Upon his resignation, the NET forfeits all rights and benefits in respect of the Contract
- 15.3 The NET who resigns will be required to refund to the Base School the amount paid for passages and other benefits as detailed in paragraph 18.

## **16. Termination of Contract**

- 16.1 The Management Committee of the Base School may terminate the service of the NET by giving him one calendar month's notice in writing or one month's salary in lieu of notice.
- 16.2 If at any time a Government medical officer, or a consulting physician who acts on behalf of the Base School, certifies that the NET is incapable by reason of any infirmity of mind or body of rendering further efficient service, his service will be terminated forthwith.
- 16.3 If the NET fails to satisfy the qualification requirement within the specified time as specified in Clause 2 above, his employment may be terminated upon the expiration of the first twelve months of the contract.
- 16.4 Upon termination of appointment, the NET will be required to refund to the Base School the amount paid for passages and other benefits as detailed in paragraph 18.
- 16.5 Upon termination of service by the Management Committee of the Base School, the NET forfeits all rights and benefits in respect of the Contract, except for those as provided for in paragraph 7.1.

## **17. Dismissal or Punishment for Misconduct, etc.**

- 17.1 The NET is liable to disciplinary punishment (including dismissal without notice or payment in lieu) by the Management Committee of the Base School if he neglects or wilfully refuses to perform his duties or in any manner misconducts himself or is convicted of a criminal offence.
- 17.2 Upon dismissal, the NET forfeits all rights and benefits in respect of the Contract.
- 17.3 Upon dismissal, the NET will be required to refund to the Base School the amount paid for passages and other benefits as detailed in paragraph 18.

## **18. Refund of Passages and Other Benefits on Resignation or Termination of Appointment**

- 18.1 If the NET resigns or has his Contract terminated within the first 12 months of the Contract period (the Contract being the first contract), he will be required to refund to the Base School:-
  - (a) the baggage allowance paid to him; and
  - (b) the cost for outward passage to Hong Kong provided for him and his family.
- 18.2 If the NET resigns or has his Contract terminated within the first 12 months of the Contract period (the Contract being a subsequent contract), he will be required to refund to the Base School the cost of the outward passages to Hong Kong provided for him and his family for that Contract.
- 18.3 If the NET resigns or has his Contract terminated during the second year of the Contract period, he will not be required to make refund for the baggage allowance and passage cost.
- 18.4 If the NET resigns or has his Contract terminated before the Contract period expires, he is liable to repay to the Base School the outstanding balance of any recoverable advance of salary in one lump sum.

## **19. Conditions for Payment of Salary on Commencement or Termination of Appointment**

- 19.1 Salary shall be paid from the date of assumption of full duties and shall cease immediately after the last day of performance of full duties except as provided below.

- 19.2 A NET with service of one academic year or more without a break and his appointment terminates, with due notice given, on a date no earlier than the beginning of
- (a) the major school holidays (i.e. Christmas, Chinese New Year and Easter Holidays) will be paid to the end of the school holidays;
  - (b) the summer vacation will be paid to the end of August or end of Contract, whichever is earlier.
- 19.3 A NET with service of less than one academic year but more than 59 days and his appointment terminates, with due notice given, on a date no earlier than the beginning of
- (a) the major school holidays (i.e. Christmas, Chinese New Year and Easter Holidays) will be paid to the end of the school holidays;
  - (b) the summer vacation will be paid to the end of July.
- 19.4 A NET with service of 59 days or less shall be paid up to and including the last day of duty.

## **20. Injury and Death Benefits**

Compensation for duty-related injury or death will be granted to the NET as provided under the Employees' Compensation Ordinance (Cap. 282).

## **21. Further Employment**

- 21.1 The offer of further employment beyond the current Contract is solely at the discretion of the Base School. The Base School and the Partner School are not obliged to give any reason for not offering further appointment and there should be no presumption that further appointment will be offered.
- 21.2 If the NET so requests, the Base School will inform him in writing whether it intends to offer him further employment on contract, subject to satisfactory completion of his current Contract. Such a request shall be made at least six months before the expiry of his current Contract. Otherwise, it will be assumed that the NET does not wish to apply for further employment and will leave the service upon expiry of his current Contract.
- 21.3 Any further employment, if offered, shall be for such period and on such terms and conditions, including salary, as may be offered by the Base School. The Base School is not obliged to refer to the terms and conditions, including salary, of the current Contract in the offer of terms and conditions, including salary, for further appointment.
- 21.4 Any request or application for further appointment on contract shall be considered and processed in accordance with the arrangements and criteria prevailing at the time of such application.

## **22. Other Conditions**

[Other conditions may be added here provided that they are in conformity with the provisions of the Education Ordinance, the Employment Ordinance and their subsidiary legislations, the relevant Code of Aid, and the instructions as the Secretary for Education may from time to time issue]

\*\*\*\*\*

**Letter of Appointment -**  
**Teacher under the Enhanced Native-speaking English Teacher Scheme**  
**in Secondary Schools**

(Two copies of this letter should be signed by the Supervisor)

Name of School: \_\_\_\_\_

Address of School: \_\_\_\_\_

Tel. No.: \_\_\_\_\_

Name of Supervisor: \_\_\_\_\_

(Full Name in English)

Name of Managers: \_\_\_\_\_

Name of Principal: \_\_\_\_\_

Dear Sir/Madam,

The Management Committee of the \_\_\_\_\_ School (the School) hereby offers you an appointment as a teacher in the School from \_\_\_\_\_ to \_\_\_\_\_ inclusive. The conditions of service in respect of this appointment are set out in the attached Memorandum on the Terms and Conditions of Service for Appointment as Teacher under the enhanced Native-speaking English Teacher (NET) Scheme (the Memorandum).

On appointment, you will be remunerated at HK\$ \_\_\_\_\_ per month (Master Pay Scale point \_\_\_\_ \* [of the reference pay scale \* \*]) with incremental date on \_\_\_\_\_ on the assumption that you assume duty on \_\_\_\_\_ as NET in this School. Your acceptance of this offer of appointment signifies your acceptance of the pay point on the appropriate pay scale as offered. Your pay or annual incremental date may be adjusted by the School to take account of any additional relevant qualifications or post-qualification teaching experience that you may have in accordance with the prevailing rules prescribed by the Education Bureau for the grant of incremental credit for experience and on production of sufficient documentary evidence of such qualifications or experience. \*[You will not be permitted to proceed beyond MPS Point 17 unless you have obtained a postgraduate diploma in Education or an equivalent qualification.]

***The assessment results of the academic and teacher training qualifications and the salary particulars stated above are valid only for your appointment under the NET Scheme in secondary schools. You would have to be subject to a separate assessment if you change to another appointment not under the NET scheme.***

Please note that the pay pertaining to each pay point on all the civil service pay scales and the ICAC pay scale is subject to reductions from 1 January 2004 and 1 January 2005 in accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance. You will be subject to the pay reduction with effect from 1 January 2005 following the adjustment to the pay scale relevant to your rank made by the Public Officers Pay Adjustments (2004/2005) Ordinance.

This offer of appointment is conditional upon your \*[satisfying a medical examination (which must include a chest X-ray examination) by an approved medical practitioner certifying that you are medically fit to teach and that you pass the chest X-ray examination and] obtaining the necessary employment visa allowing you to stay in Hong Kong and to work for the School.

Subject to the terms as set out in the Memorandum, you will receive a gratuity for the period of service. In addition, unless one of the exemptions specified in the Mandatory Provident Fund Schemes Ordinance (Cap. 485) (MPFSO) is applicable to you, the employer will arrange to make contributions for you to a registered mandatory provident fund (MPF) scheme. Please refer to Paragraph 7 of the Memorandum for details of the MPF arrangements. For details concerning exemption, please refer to Education Bureau Circular

..... No. 50/2000 on Exemption from the Provisions of the Mandatory Provident Fund Schemes Ordinance Cap. 485, a copy of which is attached for your information. The gratuity payable for the contract will be the sum which, when added to the employer's contribution to the MPF Scheme, equals 15% of the total basic salary drawn during the period of the contract.

..... I attach for your information a copy of the Education Bureau Circular No. 14/2003 concerning the Prevention of Bribery Ordinance (Cap. 201) and the acceptance of advantages and related matters, which applies to you.

If you accept this offer of appointment on the terms and conditions set out in this letter and the Memorandum, please sign both copies of the Letter of Acceptance and return one copy to me direct or through the Principal. The second copy is for your retention. Unless otherwise provided, this offer of appointment will automatically lapse if no reply is received on or before . You are advised to give due and proper notice of your intention to leave your present employment.

If you accept this offer, you are required to report for duty at \*A.M./P.M. on \_\_\_\_\_.  
\* [You will be required to attend an induction course to be organized by the Education Bureau for all teachers newly employed under the enhanced NET Scheme, the schedule and programme of which will be announced separately.]

Yours faithfully,

( \_\_\_\_\_ )  
Supervisor

Mr/Ms/Mrs \_\_\_\_\_

(Name of teacher offered appointment)

Address: \_\_\_\_\_

\_\_\_\_\_ Date \_\_\_\_\_

Footnote

\* Delete if inapplicable

\*\* Reference pay scale is the pay scale introduced on 1 April 2000 for appointment on starting salaries. The pay scale was not subject to the civil service pay adjustments in 2001 and 2002, but is subject to reductions from 1 January 2004 and 1 January 2005 in accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance. (To be deleted if the pay point does not fall on the reference pay scale.)

Guideline II.5.4.b.

**Letter of Appointment -**  
**Teacher under the Native-speaking English Teacher (NET) Scheme**  
**in Primary Schools**

(Two copies of this letter should be signed by the Supervisor)

Name of Base School:	<hr/>	
Address of Base School:	<hr/>	
	Tel. No.: <hr/>	
Name of Supervisor of Base School:	<hr/>	
	(Full Name in English)	
Name of Managers of Base School:	<hr/>	<hr/>
	<hr/>	<hr/>
	<hr/>	<hr/>
Name of Principal of Base School:	<hr/>	
	<hr/>	

Dear Sir/Madam,

..... The Management Committee of \_\_\_\_\_ School (the Base School) hereby offers you an appointment as a teacher from \_\_\_\_\_ to \_\_\_\_\_ inclusive. The conditions of service in respect of this appointment are set out in the attached Memorandum on the Terms and Conditions of Service for Appointment as Teacher under the Native-speaking English Teacher (NET) Scheme in Primary Schools (the Memorandum).

During the period of employment, you may be required to perform duties both in the Base School and in the partner school (the Partner School) whose particulars are set out below for your information:

Name of Partner School:	<hr/>	
Address of Partner School:	<hr/>	
	Tel. No.: <hr/>	
Name of Supervisor of Partner School:	<hr/>	
	(Full Name in English)	
Name of Managers of Partner School:	<hr/>	<hr/>
	<hr/>	<hr/>
	<hr/>	<hr/>
Name of Principal of Partner School:	<hr/>	

Note: The Base School and the Partner School are collectively called "the Schools" in this letter.

You will normally work in the Schools in alternate weeks. You will also be required to attend regular professional development workshops and training organized by the Education Bureau.

On appointment, you will be remunerated at HK\$ per month (Master Pay Scale point \* [of the reference pay scale \*\*]) with incremental date on the assumption that you assume duty on as NET in the Schools. Your acceptance of this offer of appointment signifies your acceptance of the pay point on the appropriate pay scale as offered. Your pay or annual incremental date may be adjusted by the Base School to take account of any additional relevant qualifications or post-qualification teaching experience that you may have in accordance with the prevailing rules prescribed by the Education Bureau for the grant of incremental credit for experience and on production of sufficient documentary evidence of such qualifications or experience. \*[You will not be permitted to proceed beyond MPS Point 22 unless you have obtained a postgraduate diploma in Education or an equivalent qualification.] \*[You are required to obtain a Teaching of English as a Foreign Language or a Teaching of English as a Second Language (TEFL/TESL) qualification at least at certificate level within the first twelve months of your employment at your own expenses and in your own spare time. If you fail to obtain the qualification required within the specified time, your employment may be terminated up on the expiration of the first twelve months of the contract.]

***Please note that the assessment results of the academic and teacher training qualifications and the salary particulars stated above are valid only for appointment under the NET Scheme in Primary Schools. You would have to be subject to a separate assessment if you change to another appointment not under the NET Scheme in Primary Schools.***

Please note that the pay pertaining to each pay point on all the civil service pay scales and the ICAC pay scale is subject to reductions from 1 January 2004 and 1 January 2005 in accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance. You will be subject to the pay reduction with effect from 1 January 2005 following the adjustment to the pay scale relevant to your rank made by the Public Officers Pay Adjustments (2004/2005) Ordinance.

This offer of appointment is conditional upon your \*[satisfying a medical examination (which must include a chest X-ray examination) by an approved medical practitioner certifying that you are medically fit to teach and that you pass the chest X-ray examination and] obtaining the necessary employment visa allowing you to stay in Hong Kong and to work for the Schools as specified above.

Subject to the terms as set out in the Memorandum, you will receive a gratuity for the period of service. In addition, unless one of the exemptions specified in the Mandatory Provident Fund Schemes Ordinance (Cap. 485) (MPFSO) is applicable to you, the employer will arrange to make contributions for you to a registered mandatory provident fund (MPF) scheme. Please refer to Paragraph 8 of the Memorandum for details of the MPF arrangements. For details concerning exemption, please refer to Education Bureau Circular No. 50/2000 on Exemption from the Provisions of the Mandatory Provident Fund Schemes Ordinance Cap. 485, a copy of which is attached for your information. The gratuity payable for the contract will be the sum which, when added to the employer's contribution to the MPF Scheme, equals 15% of the total basic salary drawn during the period of the contract.



I attach for your information a copy of the Education Bureau Circular No. 14/2003 concerning the Prevention of Bribery Ordinance (Cap. 201) and the acceptance of advantages and related matters, which applies to you.

If you accept this offer of appointment on the terms and conditions set out in this letter and the Memorandum, please sign both copies of the Letter of Acceptance and return one copy to me direct or through the Principal of the Base School. The second copy is for your retention. Unless otherwise provided, this offer of appointment will automatically lapse if no reply is received on or before . You are advised to give due and proper notice of your intention to leave your present employment.

If you accept this offer, you are required to report for duty at the Base School at \_\_\_\_\_  
\*A.M./P.M. on \_\_\_\_\_. \* [You will be required to attend an induction course to be organized by the Education Bureau for all teachers newly employed under the NET Scheme in Primary Schools, the schedule and programme of which will be announced separately.]

Yours faithfully,

( \_\_\_\_\_ )  
Supervisor

Mr/Ms/Mrs

\_\_\_\_\_  
(Name of teacher offered appointment)

Address:

\_\_\_\_\_  
Date: \_\_\_\_\_

Footnote

\* Delete if inapplicable

\*\* Reference pay scale is the pay scale introduced on 1 April 2000 for appointment on starting salaries. The pay scale was not subject to the civil service pay adjustments in 2001 and 2002, but is subject to reductions from 1 January 2004 and 1 January 2005 in accordance with the adjustments made by the Public Officers Pay Adjustments (2004/2005) Ordinance.  
(To be deleted if the pay point does not fall on the reference pay scale.)

Guideline II.5.4.c

**Letter of Acceptance**  
(to be completed by the Teacher)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(Date)

The Supervisor

\_\_\_\_\_  
(Name of School)

\_\_\_\_\_  
(Address of School)

Dear Sir/Madam,

I have read and understand the provisions contained in the Letter of Appointment and the Memorandum attached. I accept the appointment under the \*Enhanced Native-speaking English Teacher (NET) Scheme in Secondary Schools / Native-speaking English Teacher (NET) Scheme in Primary Schools offered in your letter dated \_\_\_\_\_ on the terms and conditions contained therein. I confirm that I agree to abide by my obligations under these conditions, the Education Ordinance\*\* and its subsidiary legislation, and the relevant Code of Aid#. I also agree to abide by all other instructions as may be issued from time to time by the Secretary for Education concerning government/aided/ special schools.

Yours faithfully,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Name in Block Letters)

\* Please delete if inapplicable

\*\* A copy of the Education Ordinance is available in the School for consultation.

# The relevant Code of Aid may be obtained from the School or downloaded from EDB's website ([www.edb.gov.hk](http://www.edb.gov.hk)).

## Guideline II.5.5

### **Passage Arrangements for Teachers** **Appointed under the Enhanced Native-speaking English Teacher (NET) Scheme** **in Secondary Schools / NET Scheme in Primary Schools**

#### Passages upon appointment

1. A teacher who is employed as NET under the enhanced Native-speaking English Teacher (NET) Scheme in Secondary Schools / NET Scheme in Primary Schools and whose normal place of residence is outside Hong Kong will be reimbursed the actual cost of an economy class single air passage by the most direct route (with or without stop-over en route) (referred to as a STANDARD PASSAGE) from his country of origin to Hong Kong, up to the quoted price of the STANDARD economy class single air PASSAGE obtained by the School / Base School from an airline company.
2. The cost of similar passages will also be reimbursed, if applicable, for the NET's spouse, and accompanying children who are unmarried and under the age of 18 up to a maximum of 5 persons including the NET.
3. If the NET wants to travel by an indirect route, he may be reimbursed the actual cost of the passage arranged or the quoted price of the STANDARD economy class single air PASSAGE obtained by the School / Base School, whichever is the less. Excess passage cost, if any, shall be borne by the NET.
4. If the NET has bought a ticket for return passage, whether by direct or indirect route, he will be reimbursed 50% of the airfare, or the quoted price of a STANDARD economy class single air PASSAGE obtained by the School / Base School, whichever is the less.

#### Passages upon completion of contract

5. A NET whose contract upon satisfactory completion is not being renewed will be reimbursed the cost of a STANDARD economy class single air PASSAGE to his country of origin. If the NET has bought a ticket for return passage, whether by direct or indirect route, he will be reimbursed 50% of the airfare, or the quoted price of a STANDARD economy class single air PASSAGE obtained by the School / Base School, whichever is the less. Reimbursement for similar passages will also be arranged, if applicable, for the NET's eligible family members as specified in paragraph 2 above. Such passages shall be taken not earlier than two months prior to the completion of the Contract or not later than two months after the completion of the Contract.

6. On the expiry of a contract, if the NET is returning to Hong Kong for a new contract, he will be reimbursed the cost of a STANDARD economy class return air PASSAGE between his country of origin and Hong Kong. Similar reimbursements will also be arranged, if applicable, for the NET's eligible family members as specified in paragraph 2 above. Such passages should be taken during the summer vacation immediately prior to the expiry of the Contract.

#### Application and payment

7. Passages should, in the first instance, be booked and paid for by the NET himself.
8. For the outward passage to Hong Kong, the costs will be reimbursed by the School / Base School after the arrival of the NET and his dependents, if any, upon application and on production of receipted bills and used air tickets. The application for reimbursement should be submitted within one month after the date of travel.
9. Requests for reimbursement of passage costs at the completion of a NET's Contract should be submitted, together with receipted bills, one month before the intended date of travel for payment.

## Guideline II.5.6

### **Special Allowance for Teachers** **Appointed under the Enhanced Native-speaking English Teacher (NET) Scheme** **in Secondary Schools / NET Scheme in Primary Schools**

#### Eligibility Criteria

1. A teacher who meets the following eligibility criteria may be eligible for the Special Allowance:
  - (a) the teacher is offered appointment as NET under the enhanced NET Scheme in Secondary Schools / NET Scheme in Primary Schools;
  - (b) the teacher's normal place of residence is outside Hong Kong; and
  - (c) the teacher or his spouse has not already received and is not receiving an allowance or any housing benefits for renting/acquiring accommodation in Hong Kong under the terms of his or his spouse's employment.

#### Allowance

2. A Special Allowance of \$10,500 per month is provided mainly for meeting the housing expenses incurred by the NET in Hong Kong.
3. The allowance shall be credited monthly in arrears to the NET's salary account. The allowance is not payable when the NET is on leave, except as provided in para.4 below.
4. A NET on full-pay leave may continue to receive the allowance during such leave for a maximum period of 60 days on each occasion. A female NET on full-pay maternity leave may also continue to receive the allowance during the whole period of such leave.

#### Penalties

5. A NET may render him /herself liable to disciplinary/legal proceedings and/or disqualification from receiving Special Allowance if he is found to secure or have secured an allowance by misrepresentation or deception.
6. The Permanent Secretary for Education shall have the absolute right and discretion to refuse any application for Special Allowance or to discontinue the payment of an allowance without assigning reasons thereof.
7. In the event of any dispute in the exercise of the right and discretion, the Permanent Secretary for Education's decision shall be final.
8. Notwithstanding anything contained in this guideline on the Special Allowance, the Permanent Secretary for Education reserves the right to alter any of these regulations should he at any time consider this to be necessary.
9. All NETs who have commenced to receive the Special Allowance are required to

observe and to be thoroughly acquainted with the regulations pertaining to the allowance.

Application and payment

10. A NET who meets the eligibility criteria under paragraph 1 above may apply to the School / Base School for the Special Allowance by using the standard application form available at the School.

**Extracts from Disability Discrimination Ordinance (DDO):**

**Code of Practice on Employment**

Requests for information including medical information

- 12.10. Under the DDO, it is unlawful for employers to request information from persons, which persons without a disability would not ordinarily be requested to provide, for the purpose of discriminating on the basis of a disability.
- 12.11. It is also unlawful for an employer to request medical information for the purpose of discriminating against applicants for a job on the basis of disability.
- 12.12. However, it is not unlawful for employers to request medical information where such information is necessary to determine:
  - (i) whether an applicant is able to carry out the inherent requirements of the job; or
  - (ii) whether an applicant would require services or facilities not required by a person without a disability.
- 12.13. Where medical information is required by an employer, the employer should:
  - 12.13.1 remember that, in most cases, having a disability does not adversely affect a person's general ability;
  - 12.13.2 avoid asking (either in application forms, interviews or through other means) questions of a medical nature, unless directly relevant to the performance of the inherent requirements of the job; and
  - 12.13.3 ensure that any decision based on such information relates to a person's ability to do the work.
- 12.14. In respect of pre-employment medical examinations required by an employer, the employer should also ensure that:
  - 12.14.1 the medical information is relevant to the particular duties and responsibilities of the job;
  - 12.14.2 where the applicant is not hired or offered the job after the medical examination reveals a disability, the decision not to employ is based on the person's inability to perform the inherent requirements of the job; and
  - 12.14.3 no reasonable accommodation was available to enable the applicant to perform the inherent requirements of the job, or that accommodation would impose an unjustifiable hardship.
- 12.15. Under the DDO, it is not unlawful to discriminate against a person who has an infectious disease and the discrimination is reasonably necessary to protect public health.<sup>31</sup> Infectious diseases are set out in the First Schedule to the Quarantine and Prevention of Disease Ordinance, and also include any communicable disease specified by the Director of Health. For the avoidance of doubt, HIV infection is not an infectious disease for the purposes of section 61 of the DDO.

**Guidelines for Appointment of Substitute Teachers in Aided Schools**

Schools may access the “Guidelines for Employment of Substitute Teachers in Aided Schools” on the “Supply Teacher” website in the Education Bureau’s homepage (Home > Teachers Related > Appointment & Related Matters > [Supply Teacher](#)).



**Guidelines for Appointment of  
Daily Rated Non-teaching Supply Staff in Aided Special Schools**

**General Guidelines for Employment**

1. The eligible periods for the employment of various non-teaching staff in aided special schools are summarized as follows:

Type of Supply Staff	Eligible Period
Nurse (School Section)	One day or more
Nurse (Boarding Section)	More than two days
Houseparent	More than two days
Boarding Service Master/Mistress II	More than two days
Cook	More than two days
Assistant Clerical Officer/Clerical Assistant (School Section with only one clerk)	Not less than 14 days
Special Driver/Motor Driver	One day or more
Teacher Assistant	Not less than 14 days

2. The qualifications required for a non-teaching supply staff, if applicable, should be in accordance with those stipulated in the Code of Aid for Special Schools.
3. In case of applicants with overseas qualification(s), school heads must consult their respective Senior School Development Officers in the first instance, and refer them for qualifications assessment if necessary.
4. A non-teaching supply staff's service on a daily basis is purely for relief duties and cannot, in any way, be regarded as service for any other purpose including incremental credits.
5. Schools are advised to:
  - (a) check carefully particulars on the application form against originals, in particular Identity Card and qualification documents; and
  - (b) check qualifications to determine the rate of pay.
6. Before a non-teaching supply staff takes up the job, he/she should be advised of the following:
  - (a) the number of days or period for which the supply staff will be employed. The period may be extended subject to consent of both parties;
  - (b) he/she is liable to disciplinary sanctions if he/she neglects or willfully refuses to perform his/her duties or in any manner misconducts himself-herself;
  - (c) employment may be terminated at any time by either party by giving one day's notice; and
  - (d) he/she is paid at a daily rate accordingly to the rates set by the Education Bureau (EDB) and the number of days actually worked. Payment for the days covered will be made in arrears.

### General Guidelines on how Non-teaching Supply Staff is Paid

1. The daily rates of pay for non-teaching supply staff are announced by EDB regularly. Schools should make prompt payments to their supply staff and then claim reimbursement from EDB. A supply staff on a daily basis will be paid according to the number of days actually worked. He/she is entitled to rest days and school holidays but these days will not be counted for payment.
2. The daily rates of pay for non-teaching supply staff may change from time to time. Schools are advised to update the daily rates of pay when revision is announced by EDB.
3. In case of applicants with overseas qualification(s), school heads must consult their respective Senior School Development Officers in the first instance, and refer them for qualifications assessment if necessary.
4. In case of doubt concerning the daily rate of pay for a supply staff, school heads should seek advice from their respective Senior School Development Officers.
5. Schools should send the claim forms to the Subvention Accounts Section of EDB for reimbursement. It is not necessary to send the appointment forms and copies of the certificates of the supply staff.
6. Copies of the Appointment Form for Non-teaching Supply Staff, Receipt of Non-teaching Supply Staff and Claim Form for Reimbursement of Salaries for Non-teaching Supply Staff are available at the icon of 'Forms' on EDB Homepage.

## Guideline II.8

### **Guidelines for Granting of Leave**

Schools may access relevant circulars, forms, and common questions and answers on granting of leave on the “Guidelines for Granting of Leave” website in the Education Bureau’s homepage (Home > School Administration and Management > Administration > About School Staff > Guidelines for Granting of Leave).

Guideline II.9

**Qualification Leading to the Award of Special Education Allowance for  
Teachers of Special Education Settings**

- (a) Subject to the conditions stipulated in the Codes of Aid (Section IIC at Appendix 4 of the Code of Aid for Special Schools, Appendix 4/Attachment A of the Code of Aid for Primary Schools and Appendix 3/Attachment A of the Code of Aid for Secondary Schools), a special education allowance will be awarded to eligible teaching staff of special education settings upon their completion of a recognized special education course at certificate/diploma/degree level obtained from an accredited tertiary institute.
- (b) A recognized special education course refers to one that
  - (i) contains no less than 50% of the total course content in special education; and
  - (ii) covers no less than one year for a full-time course or 360 contact hours for a part-time course; and
  - (iii) includes a practicum of no less than 8-week supervised practical teaching or equivalent in a special education setting for teachers without initial teacher training in addition to those requirements stated at (i) and (ii) above.

# **Operating Expenses Block Grant**

## **User Guide**

### **for Aided Schools**



(the former) Education Department

Education Bureau

May 2000

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*Enquiries on this User Guide can be made to Finance Division of Education Bureau (EDB) at telephone number 2892 6274 or e-mail address at [exora1@edb.gov.hk](mailto:exora1@edb.gov.hk)*

# **1. INTRODUCTION**

- 1.1 To provide aided schools with greater flexibility in the use of resources and to support the implementation of school-based management, EDB introduces the Operating Expenses Block Grant (OEBG) with effect from School Year (SY) 2000/01.
- 1.2 The distinguishing features of the OEBG are that it removes the existing constraint on transfer of funds among individual grants and allows schools to keep a larger surplus balance.
- 1.3 This Guide spells out the structure and design features of OEBG, and the principles and rules for proper and effective use of the funds provided. The financial and accounting control arrangements for implementing OEBG are also explained in this Guide.

## **2. STRUCTURE AND DESIGN FEATURES**

### **Existing Practice**

- 2.1. At present, each of the grants received by schools has its own individual ambit and transfer of funds from one grant to another is not allowed, except for the Administration Grant, the School and Class Grant and the Substitute Teacher Grant. Each grant is also subject to a surplus retention limit ranging from three months' to twelve months' provision.

### **New Practice under OEBG**

#### **Scope**

- 2.2 With effect from SY 2000/01, each school will be provided with an OEBG for meeting operating expenses. The OEBG covers virtually all the recurrent grants, except Salaries Grants or those items of expenditure which are disbursed on an actual claim or reimbursement basis (e.g. grants for rents and rates, passage and baggage allowance for teachers on overseas terms).

#### **Structure**

- 2.3 The OEBG is made up of two separate and distinct parts, known as "domains". These two domains are called "General" and "Special" respectively, as defined below -

##### General Domain

This covers most of the recurrent grants. Schools are free to decide the amount to be spent on individual constituent grants. If surpluses are available, schools may use such funds to top up expenditure on items in the Special Domain. Surplus of General Domain can also be used on items chargeable to other government subsidies outside the OEBG.

##### Special Domain

This covers grants which are allocated for achieving specific policy objectives. Each grant within the Special Domain is separate and no transfer will be allowed among the grants. Funds in this domain cannot also be transferred out, although they may be topped up with surpluses from the General Domain. The rationale behind this arrangement is to ensure that schools will deploy the funds for the specified purposes.

- 2.4 The constituent grants and inherent flexibility of OEBG will change over time.



In the light of experience and changing circumstances, EDB may consider, for instance, reclassifying an item in Special Domain as General or grouping some constituent grants in Special Domain to a flow of funds among such grants. Also, when funds are available for new initiatives, EDB shall determine whether the funds should be included in the OEBG, and in which of its two domains.

### **Initial level**

- 2.5 The OEBG for SY 2000/01 is set on the basis of the rates of the constituent grants approved for SY 1999/2000, notwithstanding the general deflation during 1999. The level of OEBG for individual schools will continue to be determined on existing bases.

### **Subsequent revisions**

- 2.6 The OEBG will be revised annually in accordance with the movement in prices. With the removal of the grant lines upon the introduction of OEBG, EDB will revise the level of OEBG in accordance with the movement of the Composite Consumer Price Index. EDB will also take into account the volume changes in determining the amount of OEBG for each school (i.e. changes in class number/size, subjects taught etc.).

### **Rate reviews**

- 2.7 Apart from inflationary and volume adjustments as mentioned above, EDB will review the need to revise in real terms the rates of individual grants as and when required.

### **Surplus retention**

- 2.8 To give schools greater flexibility, schools are allowed to retain surplus balance up to twelve months' provision of OEBG with effect from SY 2000/01. EDB will only consider applications for accumulation of surpluses in excess of twelve months' provision in exceptional circumstances.
- 2.9 When the surplus exceeds the twelve months' provision, schools are free to decide from which constituent grant the excess may be clawed back by EDB. In this regard, schools may consider paying the excess from the Special Domain first and then from the General Domain. This is because surplus in the General Domain has greater virement flexibility - surplus funds can be transferred to the Special Domain if subsequently found necessary, but not vice versa.

### **3. PRINCIPLES AND RULES ON USAGE**

#### **Fundamental Principles**

- 3.1 The OEBG provides schools with greater flexibility in the use of resources. In this regard, schools are allowed to set their own spending priorities and allocations, having regard to the objectives and policies laid down by their School Management Committees (SMC).
- 3.2 In exercising the flexibility, schools should always bear in mind that the interest of students comes first. They should also ensure that the expenditure incurred is reasonable and necessary for educational purposes. Thus, for instance, schools should keep expenditure on purchase of flower-baskets for ceremonial activities to a minimum. In addition, schools should ensure that any recurrent consequences arising from exercising funding flexibility will be absorbed within the OEBG or met by schools' own funds.

#### **Rules on Usage**

- 3.3 In incurring expenditure, schools should observe the ambit of the constituent grants of OEBG, as set out in the Code of Aid and in circulars issued by EDB from time to time. In addition, schools should ensure that the total spending should be kept within the amount of OEBG, i.e. no topping up of OEBG will be given.
- 3.4 Government subvention policy requires that the terms and conditions of service of staff in the subvented sector should not be superior to those provided by Government to comparable grades in the Civil Service. Schools should continue to follow this policy notwithstanding the flexibility available under OEBG.
- 3.5 Subsidy will continue to be provided for Provident Fund (PF) contributions in respect of clerical and janitor staff employed within the provision allocated by EDB for Administration Grant/Revised Administration Grant. For staff employed with funds under other constituent grants of OEBG, schools should meet the PF contributions with surplus funds under OEBG or their own funds. EDB
- 3.6 On the basis of the principles and rules stated above, the following items of expenditure are also not allowed to be charged to OEBG –
- (a) fringe benefits for staff, including housing benefits, provision of food or food allowance, travelling allowance, medical expenses etc.;
  - (b) penalty charges, fines and interest payments;

- (c) loans to staff or third parties;
- (d) subscription to staff associations and professional bodies;
- (e) write-offs e.g. overpayments;
- (f) administrative and management expenses of the headquarters or other service units of the sponsoring organisation.

The above list is not exhaustive. EDB will revise the list and inform schools of the changes as and when appropriate. In case of doubt, schools should consult the Regional Education Offices of EDB.

## **4. FINANCIAL AND ACCOUNTING ARRANGEMENTS**

### **Expenditure Budget**

- 4.1 To enable schools to know in advance the amount of OEBG funds available for the school year, and to facilitate the schools in setting their own spending allocations, EDB will issue an Allocation Advice (pro forma at *Appendix A*) to schools before the school year commences.
- 4.2 On the basis of the Allocation Advice, schools should devise its own budget (proforma at *Appendix B*) on how to use the OEBG funds. Schools should seek the approval of their SMCs of the budget and make the approved budget transparent to all parties concerned. Schools should also submit a copy of the approved budget to the Regional Education Offices.

### **Expenditure Control**

- 4.3 To ensure that the OEBG funds are spent properly and cost-effectively, schools should obtain directives from their SMCs regarding the scope, criteria and rules for allocating funds. Schools should ensure that the approved budget is followed in incurring expenditure. As there may be practical difficulties for schools to revert promptly to SMCs for making variations to the approved budget arising from urgent or unforeseeable circumstances, schools may consider seeking delegation of the authority from SMCs for making changes to the budget up to a certain financial limit.
- 4.4 Schools should ensure that the total expenditure is kept within the amount of OEBG. Any deficit will have to be met by the schools' own funds. Also, if expenditure is found improperly incurred or charged to OEBG funds, EDB shall ask the school concerned to explain the anomalies. In the absence of acceptable explanations, the school should make good such expenditure by charging it to its own funds.

### **Release of OEBG**

- 4.5 With effect from SY 2000-01, OEBG funds will be released to schools according to the following schedule –
  - (a) Administration Grant will be paid monthly.
  - (b) School and Class Grant will be paid in two tranches in August and April.
  - (c) Subject and Curriculum Grants and other grants will be released in one lump sum in August. Adjustment may be made during the year to account for changes in

class number/size, subjects taught etc.

- (d) School-based Support Scheme for Newly Arrived Children will be paid on submission of claims by schools.

## **Accounting and Reporting Requirements**

- 4.6 Schools should continue to maintain separate ledger accounts for each constituent grant of OEBG. In addition, schools should keep a General Domain Control Account and a Special Domain Control Account for the purpose of recording and monitoring the surpluses. Schools should also report periodically to their SMCs the expenditure position of OEBG. A proforma expenditure report is at *Appendix C*.
- 4.7 Schools should submit audited annual accounts and such other financial statements as required by EDB as at present. In respect of OEBG, schools should submit the financial statement to EDB in accordance with the format as shown in *Appendix D*. The auditors should certify that the OEBG funds have been used in accordance with the ambit and rules as promulgated in the Code of Aid and in circulars issued by EDB from time to time.

## **Surplus retention**

- 4.8 Accumulated surpluses for the individual grants up to SY 1999/2000 will be subject to the clawback arrangements prevailing before the implementation of OEBG. Any surplus balances remaining after the clawback will be aggregated and carried forward as the opening balance for SY 2000/01 of the General Domain and Special Domain respectively.
- 4.9 After OEBG implementation, schools should ascertain the surplus balances of grants under the General Domain and Special Domain respectively. The surpluses should be totaled and if this total exceeds the twelve months' provision of the prevailing level of OEBG, schools should return the excess to EDB as set out in paragraph 2.9.

## Proforma

OEBG Allocation Advice  
for School Year 20XX/XX

School Code : nnnn

Name of School: XXX School

Name of grant	Payment Frequency <sup>(1)</sup>	Basis	Amount <sup>(2)</sup> \$
<b>General Domain</b>			
Putonghua			
Administration grant			
.			
.			
.			
.			
.			
.			
Sub-total (A)			_____
			_____
<b>Special Domain</b>			
IT in Education Project			
IT Incentive grant			
.			
.			
.			
.			
.			
.			
Sub-total (B)			_____
			_____
Total (A)+(B)			_____
			_____

Note<sup>(1)</sup> Payment frequency A= Annual B= Bi-annual M= Monthly C= Claim basis<sup>(2)</sup> Provisional allocation, subject to adjustment when information on class number/size, subjects taught for the school year are finalised.

**Proforma**  
(for reference only)

**XXX School**  
**OEBG Expenditure Budget for School Year 2000/01**

Actual SY 1999-00 \$	Name of grant	Budget SY 2000-01 \$
	<b>General Domain</b>	
x,xxx	Putonghua	x,xxx
x,xxx	Administration grant	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
<u>x,xxx</u>	.	<u>x,xxx</u>
<u>xxx,xxx</u>	Sub-total (A)	<u>xxx,xxx</u>
	<b>Special Domain</b>	
x,xxx	IT in Education Project	x,xxx
x,xxx	IT Incentive grant	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
x,xxx	.	x,xxx
<u>x,xxx</u>	.	<u>x,xxx</u>
<u>xxx,xxx</u>	Sub-total (B)	<u>xxx,xxx</u>
<u>x,xxx,xxx</u>	Total (A) + (B)	<u>x,xxx,xxx</u>

Submitted by : \_\_\_\_\_  
(School Principal)

Approved by : \_\_\_\_\_  
(Chairman of SMC)

Date : \_\_\_\_\_ Date : \_\_\_\_\_

**Proforma**  
(for reference only)

**XXX School**  
**OEBG Expenditure Report for the period dd/mm/yy to dd/mm/yy**

<b>Name of grant</b>	<b>Approved Budget</b>	<b>Revised Budget</b>	<b>Actual Expenditure</b>	<b>Percentage spent</b>
(1)		(2)	(3)	(4)=(3)/(2)*100%
\$		\$	\$	%
<b>General Domain</b>				
Putonghua				
Administration grant				
.				
.				
.				
.				
.				
.				
Sub-total (A)				
<b>Special Domain</b>				
IT in Education Project				
IT Incentive grant				
.				
.				
.				
.				
.				
.				
Sub-total (B)				
Total (A) + (B)				



Name of School: XXX School

**OPERATING EXPENSES BLOCK GRANT  
FINANCIAL STATEMENT FOR THE YEAR ENDED dd/mm/yy**

	<b>General Domain</b>	<b>Special Domain</b>	<b>Total</b>
	\$	\$	\$
<b>Grants received</b>			
<b>Actual expenditure</b> <i>(Supporting details per Appendix E and F attached)</i>	_____	_____	_____
<b>Surplus/(Deficit) for the year</b>			
Amount transferred (to Special Domain)/ from General Domain	_____	_____	_____
<b>Surplus/(Deficit) for the year after transfer</b>			
<b>Surplus brought forward from previous years</b> <i>(Note)</i>			
<b>Deficit transferred to Subscriptions Account</b>	_____	_____	_____
<b>Surplus carried forward to next year</b>	=====	=====	=====

Note: Surpluses of individual constituent grants accumulated prior to School Year 2000/01 should be aggregated and shown under the respective domain.

Name of School: XXX School

**OPERATING EXPENSES BLOCK GRANT**  
**STATEMENT OF ACTUAL EXPENDITURE FOR THE YEAR ENDED dd/mm/yy**

Previous Year \$	Name of grant	Current Year \$	Remarks
	<b>General Domain</b>		
	Putonghua		
	Administration grant		
	.		
	.		
	.		
	.		
	.		
	Others (please specify)		
	Sub-total (A)		
	<b>Special Domain</b>		
	IT in Education Project		
	IT Incentive grant		
	.		
	.		
	.		
	.		
	.		
	Sub-total (B)		
	Total (A) + (B)		

Name of School : XXX School

**OPERATING EXPENSES BLOCK GRANT ACCOUNT**  
**SPECIAL DOMAIN**  
**STATEMENT OF ACTUAL EXPENDITURE FOR THE YEAR ENDED dd/mm/yy**

<b>Name of Grant</b>	School-based remedial support programme \$	Integration of children with special education needs \$ \$ \$			<b>Total \$</b>
Grant Received					
Actual Expenditure					
Surplus/(Deficit) for the year					
Amount transferred from General Domain					
Surplus/(Deficit) for the year after transfer					
Surplus brought forward from previous years					
Deficit transferred to Subscriptions Account					
Surplus carried forward to next year					

# Composite Furniture and Equipment Grant for Aided Schools User Guide

## Contents

### **Part**

- I. Principles and Rules on Usage
- II. Procurement, Financial and Accounting Arrangements
- III. Accountability
- IV. Separate Furniture and Equipment Subsidy outside the  
Composite Furniture and Equipment Grant (CFEG)

## I. Principles and Rules on Usage

The CFEG provides schools with greater flexibility in the use of resources. In this regard, schools should set their spending priorities and allocations in line with the objectives and policies laid down by their School Management Committees (SMCs).

In exercising the flexibility, schools should always bear in mind that the interest of students should come first. They should ensure that the expenditure incurred is reasonable and necessary for educational purposes and that the procured F&E items are properly recorded, managed and protected from loss or damage. In addition, schools should ensure that the CFEG/TFEG is able to cover all the expenditures.

### (a) Ambit

The ambit of the CFEG/TFEG will cover

- (i) F&E items to meet the needs of schools and students;
- (ii) maintenance/repairs fees for F&E items; and
- (iii) insurance premium for non-standard F&E items for school portions.

Schools may make reference to the F&E lists for standard design schools issued by the Education Bureau (EDB) —

- (1) Secondary schools, primary schools, schools for the mildly intellectually disabled, schools for the moderately intellectually disabled, schools for the mildly and moderately intellectually disabled, schools for the severely intellectually disabled and schools for the physically disabled.  
(Website - <http://edb.gov.hk/index.aspx?langno=1&nodeid=2100> )
- (2) The F&E lists of other special schools are in the process of updating. Please contact the School Building Section of EDB at 2892 6364 for information, if required.

### (b) Financial Limit

Subject to funds being available, there is no financial limit for F&E items to be purchased.

(c) Surplus

Unspent CFEG funds of a school, together with any surplus from its TFEG and the former Special Recurrent F&E Grant can be accumulated up to five times the provision of its prevailing level of the CFEG. Any exceeding balance is subject to clawback by EDB.

(d) Deficit

- (i) Schools are allowed to use the surplus of the General Domain of the OEBG to cover the deficit of the CFEG.
- (ii) Any deficit of the CFEG not covered by the surplus from the General Domain of the OEBG will have to be borne by non-government funds.

II. Procurement, Financial and Accounting Arrangements

(a) Procurement and Financial Arrangements

Schools should adhere to the tendering and purchasing procedures stipulated in the Education Bureau Circular No. 30/99 on "Tendering and Purchasing Procedures in Aided Schools" issued on 4 August 1999 and/or guidelines which may be issued at a later stage, if required.

(b) Accounting Arrangements

- (i) Schools should maintain a separate account named "Composite Furniture and Equipment Grant Account" to record the income and expenditure of the TFEG and CFEG. The expenditure of this account should be captured in the Balance Sheet under both headings of "Fixed Assets for Furniture and Equipment" and "Transition Furniture and Equipment Grant and Composite Furniture and Equipment Grant Utilised". In addition, schools are required to record the procured items in the Fixed Assets Register. A proforma of the Fixed Assets Register is at the Annex.
- (ii) In respect of these grants, schools should submit the financial statements in accordance with the formats to be promulgated later in relevant circular memorandum calling for the submission of the audited annual accounts.

(c) Expenditure Control

- (i) To ensure that the CFEG/TFEG funds are spent properly and effectively, schools should obtain directives from their SMCs regarding the scope, criteria and rules of allocating funds. Schools should devise their own budget on how to use the CFEG/TFEG funds and seek the approval of their SMCs of the budget and make the approved budget transparent to parents and teachers.
- (ii) Schools should ensure that the total expenditure is kept within the amount of CFEG/TFEG. Also, if any expenditure is found improperly incurred or charged to CFEG/TFEG funds, EDB shall ask the school concerned to explain the anomalies. In the absence of acceptable explanations, the school should make good such expenditure by non-government funds.

### III. Accountability

Schools have to account for the proper utilization of the CFEG and the TFEG by

- (a) ensuring that they have suitable F&E items for the delivery of educational services and that such F &E items are properly recorded, managed and protected from loss or damage;
- (b) developing accountable school-based procedures for F&E acquisition/replacement, monitoring and evaluation;
- (c) relating the school budget, including the budget for F&E, to the annual school plan;
- (d) keeping a separate account named “Composite Furniture and Equipment Grant Account” to record the income and expenditure of the TFEG and CFEG; and
- (e) making available the school annual report with a financial statement for parents and EDB.

### IV. Separate F&E Subsidy outside the CFEG

Separate F&E subsidy will continue to be provided to schools by EDB for



- (a) school administration and management system, education television and information technology in education projects;
- (b) replacing standard F&E items lost in natural disaster, burglary, theft, fire etc.; and
- (c) new initiatives. (However, expenditures on replacement of these F&E items have to be met by the CFEG.)



### Guideline III.3

#### **Substitute Teacher Grant (STG)**

Subject to the consent of the majority of teachers and parents in advance, the School Management Committee, may opt to temporarily freeze not more than 10% of the teaching establishment and claim STG. The qualifying period for claiming STG is three consecutive days and the calculation of the Grant is as follows:

$$\begin{array}{ccccc} \text{Daily rate of} & & \text{Global average utilization} & & \text{No of school days} \\ \text{Supply Teacher} & \times & \text{rate (GAUR) of previous 3} & \times & \text{that a vacancy arises} \\ & & \text{years @} & & \end{array}$$

@ Schools will be advised of the GAUR as specified in the claim form EDB provided.

2. Schools may use the STG for employing teachers and supplementary staff and staff training purposes. If supply teachers are employed, they should be paid at standard rates. Schools should have documented guidelines and procedures in using the STG and reporting the use of STG in their annual report. The decision to claim STG should be reviewed by the school every year.

#### Guideline III.4

##### **Collection of Fines/Charges/Fees for Specific Purposes**

- (1) No collections shall exceed the ceilings as announced by the Permanent Secretary. All collections should be credited to the Subscriptions/ General Funds Account except for collections of charges for non-standard items.
- (2) To enhance transparency, schools should inform the parents of the fees and charges to be collected from the pupils (including fees collected by the Parent-Teacher Association, the student union and others, if any) and list out the purposes of such collections.
- (3) The collection of fees by school shall be forthwith acknowledged in writing by the Supervisor, manager or teacher on a proper form of receipt. Proper accounts of the fees collected must be kept.
- (4) For the collection of registration fees, schools should fulfill the following requirements –
  - (a) No registration fees (and entrance examination fees) should be collected from pupils allocated to school through the School Places Allocation Systems (including pupils admitted by discretionary places admission) or replacement assistance of the Permanent Secretary. Moreover, the registration fee should not be collected before the school offers a place to a pupil;
  - (b) The registration fee may be collected only from pupils who are required to pay school fees. Any pupil who has paid the registration fee and subsequently takes up the place offered to him/her by the school must be credited with the amount of the registration fee in the first instalment of the school fee to be paid by him/her; and
  - (c) Any pupil who has paid the registration fee when offered a school place but subsequently decides not to take the place, may forfeit the fee.
- (5) For collections of charges for non-standard items, schools should fulfill the following requirements -
  - (a) Schools should consult the parents and advise parents of the details of the proposed collection in advance. If the majority of parents object to the proposal, schools should withdraw the proposal;
  - (b) Schools should issue a list of all agreed collections with details to parents, and display it prominently in the school. At the end of the school year, schools should send a financial statement to parents informing them of how the collections have been spent;

- (c) Schools should keep a separate ledger account to record all income and expenditure pertaining to such collections, and upon request produce it for the Bureau's inspection. In addition, schools should include a separate statement showing all the income and expenditure relating to such collections in the annual audited financial statement of accounts; and
  - (d) Schools are advised not to collect such charges from needy parents.
- (6) The School Management Committee may devise further procedures governing the collection.

**Items Chargeable to the School and Class Grant  
in Fee-charging Aided Primary Schools**

**I. School-based items**

1. Postage and stamp duty
2. Newspapers and magazines
3. Telephone
4. Audit fee
5. Wreaths, flower-baskets and similar tributes on behalf of the school [see Note (1)]
6. 50% of professional fees for essential professional advice of a legal, architectural, or similar nature [see Note (2)]
7. Expenditure on staff training [see Note (3)]

**II. Class-based items**

1. Repairs
2. Travelling expenses for staff on official duty
3. Teachers' textbooks, maps and sets of books for supplementary reading, etc.
4. Consumable stores
5. Fuel, light and power [see Note (4)]
6. Cleaning materials
7. Library books for pupils
8. Water
9. Printing and stationery

**Notes :**

- (1) Schools should exercise due care and economy to ensure proper use of government Subventions. Expenditures for ceremonial activities should be kept to the minimum.
- (2) Professional fees include a reasonable charge for preliminary sketch plans of a proposed project which may not be subsequently approved, provided that such payments are taken into account finally, if the project proceeds.
- (3) Expenditure on staff training would normally be limited to short course taken in Hong Kong, and similar training overseas not involving additional travelling expenses. The training would have to be directly related to the work of the staff.
- (4) Deposits in respect of electricity, gas and water meters should not be charged to any income and expenditure accounts but should be shown as asset items in the balance sheet.

Guideline III.5.b

**Items Chargeable to the School and Class Grant in  
Aided Schools (except fee-charging aided primary schools)**

I. School-based items

1. Postage and stamp duty
2. Newspapers and magazines
3. Celebrations and entertainment [see Note (1)]
4. Audit fee
5. Wreaths, flower-baskets and similar tributes on behalf of the school [see Note (2)]
6. Professional fees for essential professional advice of a legal, architectural or similar nature [see Note (3)]
7. Expenditure on supplementary teaching staff [see Note (4)]
8. Expenditure on staff training [see Note (5)]
9. Telephone

II. Class-based items

1. Repairs
2. Transport and travelling expenses wholly incurred on school business, excluding travel between home and school.
3. Other minor items specifically accepted by the school as essential or of educational value.
4. Teachers' textbooks, maps and sets of books for supplementary reading, etc.
5. Consumable stores
6. Fuel, light and power [see Note (6)]
7. Cleaning materials
8. Prizes
9. Retirement or death benefits for staff not eligible for any other scheme, provided that such benefits do not exceed those available to similar staff eligible for another scheme, such as provident fund.

10. Library books for pupils
11. Water
12. First-aid facilities
13. Sports
14. Extra-curricular activities, including educational visits
15. Printing and stationery

Notes:

- (1) Under school-based management, the School Management Committee (SMC) / Incorporated Management Committee (IMC) may approve expenses on celebrations and 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 with 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 School and Class Grant. 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 SMC / IMC is required to provide full justifications if the expenses exceed these limits. Under no circumstances should the entertainment expenses for staff not related to their discharge of duties be charged to this account or to any school funds account.
- (2) School should exercise due care and economy to ensure proper use of government subventions. Expenditure for ceremonial activities should be kept to the minimum.
- (3) Professional fees include a reasonable charge for preliminary sketch plans of a proposed project which may not be subsequently approved, provided that such payments are taken into account finally, if the project proceeds.
- (4) Expenditure on supplementary teaching staff on standard academic subjects is not normally allowed. The intention is to facilitate supplementary teaching in such areas as art, music, physical education, practical subjects and a third language.
- (5) Expenditure on staff training would normally be limited to short courses taken in Hong Kong, and similar training overseas not involving additional travelling expenses. The training would have to be directly related to the work of the staff.
- (6) Deposits in respect of electricity, gas and water meters should not be charged to any income and expenditure accounts but should be shown as asset items in the balance sheet.



**Items Chargeable to the School and Class Grant and the Boarding Grant in Aided Special Schools**

A. Items chargeable to the School and Class Grant

I. School-based items

1. Postage and stamp duty
2. Newspaper and magazine
3. Celebrations and entertainment [See Note 1]
4. Audit fee
5. Wreaths, flower-baskets and similar tributes on behalf of the schools [See Note 2]
6. Professional fees for essential professional advice of a legal, architectural, or similar nature [See Note 3]
7. Expenditure on supplementary teaching staff [See Note 4]
8. Expenditure on staff training [See Note 5]
9. Telephone

II. Class-based items

1. Repairs
2. Transport and travelling expenses wholly incurred on school business, excluding travel between home and school
3. Other minor items specifically accepted by the school as essential or of educational value
4. Teachers' textbooks, maps and sets of books for supplementary reading, etc.
5. Consumable stores
6. Fuel, light and power [See Note 6]
7. Cleaning materials
8. Prizes
9. Retirement or death benefits for staff not eligible for any other scheme, provided that such benefits do not exceed those available to similar staff eligible for another scheme, such as provident fund
10. Library books for pupils
11. Water
12. First-aid facilities
13. Sports
14. Extra-curricular activities including educational visits
15. Printing and stationery
16. Uniforms for janitor staff
17. Bank charges for service in the auto-pay system for fee collection
18. Medical fee for examination and diagnosis (not treatment) by a private doctor of pupil suspected with infection or infestation
19. Paramedical grant element (for schools with paramedical services)
  - a. Store and materials for therapeutic services
  - b. Stationery and printing related to paramedical services
  - c. Reference books for allied health staff
  - d. Repairs and maintenance for therapeutic equipment and furniture
  - e. Purchase of small items of equipment and furniture for therapy
  - f. Postage and stamp duties related to provision for paramedical services
  - g. Fuel, light, power and water related to paramedical services

- h. Cleaning materials
- i. Uniforms for allied health staff
- j. First-aid facilities
- k. Transport expenditure for provision of paramedical services such as home visits and visits to clinics and hospitals
- l. Incidental expenses on activities related to therapeutic services

B. Items Chargeable to the Boarding Grant

- 1. Food
- 2. Programme expenses
- 3. Consumable stores
- 4. Uniform for houseparents, janitor staff and allied health staff
- 5. Printing and stationery
- 6. Postage and stamp duty
- 7. Newspapers and magazines
- 8. Repairs
- 9. Fuel, light and power [See Note 6]
- 10. Cleaning materials
- 11. Water
- 12. Telephone
- 13. Transport and travelling expenses wholly incurred on school business, excluding travel between home and school.
- 14. First-aid facilities
- 15. Celebrations and entertainment [See Note 1]
- 16. Sports, educational visits
- 17. Prizes
- 18. Audit fee
- 19. Bank charges for service in the auto-pay system for fee collection
- 20. Wreaths, flower-baskets and similar tributes on behalf of the school [See Note 2]
- 21. Professional fees for essential professional advice of a legal, architectural, or similar nature [See Note 3]
- 22. Other minor items specifically accepted by the school as essential or of educational value
- 23. Expenditure on staff training [See Note 5]
- 24. Medical fee for examination and diagnosis (not treatment) by a private doctor of a pupil suspected with infection or infestation

Notes :

- 1. Under school-based management, the School Management Committee (SMC) / Incorporated Management Committee (IMC) may approve expenses on celebrations and 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 with 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 School and Class Grant. Schools are required to avoid lavishness and to make conscientious decision in providing such expenses. The limit 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 SMC / IMC is required to provide full justifications if the expenses exceed these limits. Under no circumstances should the entertainment expenses for staff not related to their discharge of duties be charged to this account or to any school funds account.

2. Schools should exercise due care and economy to ensure proper use of government subventions. Expenditure for ceremonial activities should be kept to the minimum.
3. Professional fees include a reasonable charge for preliminary sketch plans of a proposed project which may not be subsequently approved, provided that such payments are taken into account finally, if the project proceeds.
4. Expenditure on supplementary teaching staff on standard academic subjects is not normally allowed. The intention is to facilitate supplementary teaching in such areas as art, music, physical education, practical subjects and a third language.
5. Expenditure on staff training would normally be limited to short courses taken in Hong Kong, and similar training overseas not involving additional travelling expenses. The training would have to be directly related to the work of the staff.
6. Deposits in respect of electricity, gas and water meters should not be charged to any income and expenditure accounts but should be shown as asset items in the balance sheet.

**Duties of Senior Teachers in Primary Schools with six senior Teachers**

1. The duties of Senior Teachers in a standard-sized aided primary school which is provided with six Senior Teachers are generally as follows -
  - (a) Deputy Head - general administrative duties, time-tabling, distributing teaching loads, control of office /janitor/minor staff, school functions (open day, speech day, etc.), parent-teacher association, induction of new teachers, in-service training and staff development, serving as a link between the Head of the school and the teaching staff;
  - (b) In-charge of Academic Studies - organising remedial teaching, co-ordinating the work of teachers in charge of the various subjects or special education classes and in the implementation of civic education, liaison with the Education Bureau, monitoring activity approach and producing the textbook list;
  - (c) In-charge of Counselling and Guidance - discipline matters, tracing and reporting drop-outs, co-ordinating the whole-school approach in school counselling and guidance, moral education, liaison with parents, liaison with Student Guidance Personnel, liaison with Police;
  - (d) In-charge of General Affairs - sick/maternity leave arrangements, acquisition of supply teachers, arrangements for teaching practice for College of Education students, admission of new pupils, school internal examinations, matters relating to Secondary School Places Allocation and Primary One Admission, textbook and stationery grant, student travel assistance scheme, student records;
  - (e) In-charge of Extra-curricular and Other Activities - cultural and physical, games day, inter-school sports and dance activities organized by the H.K. & N.T. Schools Sports Associations, inter-school music and speech activities organized by the H.K. Schools Music and Speech Association, organizing educational visits, involvement in community functions relating to civic education, fire drills, safety patrol, Community Youth Club and Junior Police Call activities;
  - (f) In-charge of Teaching Aids, Furniture and Equipment - ETV, teaching aids, school furniture and equipment, wireless induction loop system, notice boards, minor repairs, first aid and School Medical Service Scheme, School Dental Care Service etc., school/class libraries.
2. The Management Committee or Head of a school may exercise discretion in the allocation of duties of Senior Teachers as well as the re-distribution of their duties in the light of the school's entitlement of Senior Teachers.

### **Duties of Senior Teachers in Primary Schools with 8 senior Teachers**

1. The duties of Senior Teachers in a standard-size aided primary school which is provided with eight Senior Teachers are generally as follows -
  - (a) Deputy Head - general administrative duties, time-tabling, distributing teaching loads, sick/maternity leave arrangements, hiring of supply teachers, arrangement for teaching practice for College of Education students, control of office staff/workmen, school functions (open day, speech day, etc.), parent-teacher association, induction of new teachers, in-service training and staff development, serving as a link between the Head of the school and the teaching staff.
  - (b) In-charge of Academic Studies - co-ordinating the work of teachers in charge of the various subjects other than Chinese, English and Mathematics, and special education classes (if any) and in the implementation of moral and civic education, liaison with the Education Bureau, monitoring activity approach and producing the textbook list, school/class libraries, ETV, wirefree induction loop system.
  - (c) In-charge of Discipline, Counselling and Guidance - discipline matters, tracing and reporting drop-outs, co-ordinating the whole-school approach in school counselling and guidance, liaison with parents, liaison with Student Guidance Personnel, liaison with Student Guidance Section, liaison with Police.
  - (d) In-charge of General and School Affairs - admission of new pupils, school internal examinations, matters relating to Secondary School Place Allocation and Primary One Admission, textbook and stationery grant, student travel assistance scheme, student records, teaching aids and school furniture and equipment, notice boards, minor repairs, first aid, School Medical Service Scheme, School Dental Care Service.
  - (e) In-charge of Extra-curricular and Other Activities - cultural and physical, games day, inter-school sports, speech and dance activities organized by the HK & NT Schools Sports Associations and the HK Schools Music and Speech Association, organizing education visits, involvement in community functions relating to civic education, fire drills, safety patrol, Community Youth Club and Junior Police Call activities.
  - (f) } 3 Panel Chairs, one for each of the three major subjects of Chinese, English and
  - (g) } Mathematics - in charge of the overall organization and teaching of the
  - and } respective subject in school and its related matters, such as planning the school-
  - (h) } based syllabus, preparing the scheme of work, choosing textbooks and resources,
  - } implementing and monitoring remedial teaching, planning teaching programmes
  - } based on the framework of target-oriented curriculum.
2. The Management Committee or Head of school may exercise discretion in the allocation of duties of Senior Teachers as well as the re-distribution of their duties in the light of the school's entitlement of Senior Teachers.

**Duties of Senior Teachers in  
Primary Special Schools/Primary Section of Special Schools**

The duties of the Senior Teachers in the primary section of a special school may be grouped as follows :

- (a) General Administrative Duties : time-tabling, distributing teaching loads, control of office/secretarial staff, school functions such as open day, speech day etc., parent-teacher association, induction of new teachers, in-service training and staff development, serving as a link between the Head of the school and the teaching staff;
- (b) Duties relating to Academic Studies - organising remedial teaching, co-ordinating the work of teachers in charge of the various subjects, monitoring individual education programmes and producing the textbook list;
- (c) Duties relating to Counselling and Guidance - discipline matters, attendance policy and handling of drop-outs, counselling and guidance, moral education, career guidance, liaison with parents, working in partnership with Student Guidance Personnel, liaison with Police and other organizations related to children and youth services;
- (d) Duties relating to General Affairs - sick/maternity leave arrangements, acquisition of supply teachers, arrangements for teaching practice for students of the Hong Kong Institute of Education/local universities, admission of new pupils, school internal examinations, matters pertinent to public examinations and student records;
- (e) Duties relating to Extra-curricular and Other Activities - cultural and physical, games day, inter-school sports and dance activities, inter-school music and speech activities, Sister Schools Scheme, organising educational visits, fire drills, safety patrol, Community Youth Club and Junior Police Call activities etc.;
- (f) Duties relating to Teaching Aids, Furniture and Equipment - ETV, audio-visual aids and school furniture and equipment, notice boards, minor repairs, first aid, school/class libraries, etc.

**Duties of the Additional Senior Teacher Post of English**

1. The post is to provide curriculum leadership in the teaching of English to improve co-ordination, planning and methodology. Curriculum-related duties of a senior teacher of English may include, as exemplified below, the overall organization and teaching of English in his/her school, widening pupils' exposure to English, including the creation and use of an English-rich environment and the promotion of life-wide learning. While performing these duties, the senior teacher of English will have to take up the roles of a change agent and a curriculum leader.

(a) Curriculum planning and organization

- (i) To plan and organize -
  - English learning and teaching (e.g. the school-based English curriculum, schemes of work, textbooks and resources, teaching programmes based on the CDC English Language Education curriculum documents)
  - remedial/enhancement measures (e.g. remedial teaching and enhancement programmes within and beyond school hours)
  - assessment policy and organization (e.g. formative and summative assessments, homework, projects, tests and examinations)
  - research and development projects, if appropriate (e.g. action research, QEF projects)
- (ii) To plan and organize -
  - learning experiences in the informal curriculum and life-wide learning (e.g. English club/corner activities, visits, inter-school collaboration projects and competitions, other kinds of extra-curricular activities)
  - learning experiences with cross-curricular elements to enhance English language learning (e.g. development of modules or whole-school activity week involving different key learning areas across the curriculum)
  - self-access learning (e.g. use of IT, project work, extensive reading, self-access learning corner)

(b) Curriculum management

- (i) To monitor and evaluate English learning and teaching, remedial/enhancement measures and assessment (e.g. exercise book inspection, programme/lesson preparation, lesson observation, scrutiny of examination papers and evaluation of the effectiveness of relevant measures/programmes)
- (ii) To monitor and evaluate the school-based English language programme (including extra-curricular activities, cross-curricular/life-wide learning programmes) in promoting English language learning, and developing self-access learning skills and attitudes (e.g. development and implementation of evaluation mechanisms)
- (iii) To provide varied forms of communication (external and internal) for exchanging information and ideas on English learning and teaching, remedial/enhancement measures and assessment
- (iv)\* To provide varied forms of communication (external and internal) for the smooth conduct of extra-curricular activities, cross-curricular/life-wide

learning programmes, extensive reading schemes and project work, and the sharing of useful IT resources for self-access learning

- (v) To provide professional development opportunities and support for English teachers in the areas of English learning and teaching, catering for learner diversity and assessment (e.g. theory and practice, methodology, team-teaching, collaboration with experts)
- (vi) To provide professional development and support for English teachers in the organization and conduct of extra-curricular activities, cross-curricular/life-wide programmes and self-access learning (e.g. theory and practice, methodology, team-teaching, collaboration with experts)
- (vii) To manage the learning and teaching resources in school to ensure maximized usage

2. Before this additional senior teacher post of English, some large-sized aided primary schools have been provided with eight or more senior teacher posts, one of which may, at the discretion of individual school management committees (SMCs) be allocated for taking charge of the panel of English. These schools, which are entitled to two senior teachers of English starting from 1 September 2001, may consider assigning one teacher to be the panel chairperson (PC1) mainly responsible for the overall organization and teaching of English, taking up the duties of (a)(i), (b)(i), (b)(iii) and (b)(v) as listed above. The other senior teacher can be the panel chairperson (PC2) mainly responsible for widening pupils' exposure to English, including the creation and use of an English-rich learning environment and the promotion of life-wide learning. PC(2) will then take up the duties of (a)(ii), (b)(ii), (b)(iv), (b)(vi) and (b)(vii) as listed above.

- \* A senior teacher of English in a special school is also required to coordinate with other non-teaching staff in carrying his/her duties.



**Expected Duties of Teacher Librarians in Aided Schools**

To provide quality library service for students with special needs, duties of teacher-librarians should include but not be limited to the following:

1. To provide quality school library services by
  - a. Selecting, acquiring, processing, cataloguing, maintaining, circulating, stock-taking and writing off library books and other resource materials for the school library \* and class libraries;
  - b. Equipping the school library with computers, multi-media equipment and adaptive equipment for students with special needs;
  - c. Establishing library automation system, circulation procedures and guidelines for use of library facilities and equipment;
  - d. Coordinating library periods and other related activities to equip students with information skills;
  - e. Conducting seminar for parents on information skills and use of library resources; and
  - f. Advising the school heads, teachers and other staff on matters relating to the school library \* and class libraries.
2. To collaborate with teachers in implementation of school curriculum by
  - a. Collecting, organizing and displaying library resources to support school-based curriculum;
  - b. Supporting and developing resource-based teaching and learning activities of the school-based curriculum;
  - c. Developing teaching resources to tie in with the changeover from the subject-based curriculum to key learning areas or developing school-based curriculum teaching resources and teaching materials to meet the diversified needs, abilities and interests of students with special educational needs; and
  - d. Organizing library programmes, reading schemes and other related activities to support and enrich the school-based curriculum.
3. To manage education resources and information by:
  - a. Developing learning resources for students;
  - b. Acting as a resource person for students, teachers and other staff in quest of library resources;
  - c. Conducting seminars on library resources and information skills; and
  - d. Promoting the use of teaching materials and school-based curriculum resources.

4. To promote reading in school by:
  - a. Promoting good books, magazines, newspapers, on-line readings and other library collections; and
  - b. Organizing library programmes and reading schemes to promote reading in school, and developing strategies in nurturing students' reading interests and habits.
5. To carry out other appropriate duties as required by the head of school.

\* Note: For schools for the intellectually disabled and schools for the visually impaired with intellectual disability, the school library may embrace the functions of toy library to meet the diversified needs, abilities and interests of students with special educational needs.

## Guideline IV.2

### **Job Description for Laboratory Technician I**

1. To assist teachers to supervise the pupils with diverse interests and abilities in performing science experiments.
2. To assist teachers in planning, trying out and conducting science experiments and relevant demonstrations, as well as other science-related activities (e.g. science/STEM-related projects and competitions).
3. To assist teachers in assessing pupils' performance in science-related activities, including the smooth implementation of school-based assessments.
4. To prepare, update and manage science-related materials/resources, including those related to data-capturing systems, digital multimedia resources and web-based materials.
5. To provide support and advice on science-related learning (e.g. science club activities, "lesson study" in the Science Education Key Learning Area).
6. To prepare, construct, operate and maintain laboratory apparatus and equipment, and to conduct routine laboratory tests.
7. To purchase laboratory apparatus, equipment and other items necessary for laboratories.
8. To prepare annual estimates of consumables, stores and additional items for laboratories.
9. To keep stores and inventory in laboratories, and to carry out annual stocktaking of all stores and equipment in laboratories.
10. To be responsible for the maintenance of science-related facilities.
11. To assist in coordinating the use of resources among laboratories.
12. To be responsible for all the normal safeguards in laboratories.
13. To provide support and advice on the promotion and monitoring of laboratory safety.
14. To supervise and co-ordinate the work of the Laboratory Technicians II/III.
15. To instruct and supervise laboratory attendants in the work of the laboratories and the preparation rooms.
16. To undertake any other duties as required by the Principal.

*(updated on 1 September 2017)*

### **Job Description for Laboratory Technician II/III**

1. To assist teachers to supervise the pupils with diverse interests and abilities in performing science experiments.
2. To assist teachers in planning, trying out and conducting science experiments and relevant demonstrations, as well as other science-related activities (e.g. science/STEM-related projects and competitions).
3. To assist teachers in assessing pupils' performance in science-related activities, including the smooth implementation of school-based assessments.
4. To prepare, update and manage science-related materials/resources, including those related to data-capturing systems, digital multimedia resources and web-based materials.
5. To provide support and advice on science-related learning (e.g. science club activities, "lesson study" in the Science Education Key Learning Area).
6. To prepare, construct, operate and maintain laboratory apparatus and equipment, and to conduct routine laboratory tests.
7. To purchase laboratory apparatus, equipment and other items necessary for laboratories.
8. To prepare annual estimates of consumables, stores and additional items for laboratories.
9. To keep stores and inventory in laboratories, and to carry out annual stocktaking of all stores and equipment in laboratories.
10. To be responsible for the maintenance of science-related facilities.
11. To be responsible for all the normal safeguards in laboratories.
12. To provide support and advice on the promotion and monitoring of laboratory safety.
13. To instruct and supervise laboratory attendants in the work of the laboratories and the preparation rooms.
14. To undertake any other duties as required by the Principal.

*(updated on 1 September 2017)*

**Appointment Forms of Teaching Staff and Non-teaching Staff**

Schools may access the following appointment forms of teaching staff and non-teaching staff on the “Appointment Matters” website in the Education Bureau’s homepage (Home > School Administration and Management > Administration > About School Staff > [Appointment Matters](#)).

- Appointment Forms (Primary, Secondary and Special Schools) of Teaching Staff in Aided Schools
- Appointment Forms (Primary, Secondary and Special Schools) of Non-teaching Staff in Aided Schools

**Appointment Form of Daily-rated Supply Teachers**

Schools may access the “Appointment Form of Daily-rated Supply Teachers” which is attached to the “Guidelines for Employment of Substitute Teachers in Aided Schools” on the “Supply Teacher” website in the Education Bureau’s homepage (Home > Teachers Related > Appointment & Related Matters > [Supply Teacher](#)).

## Appointment Form for Daily-rated Non-teaching Supply Staff of Aided Special Schools

Name of School: \_\_\_\_\_

1. **Name:** Mr/Mrs/Miss/Ms\* \_\_\_\_\_ (in English) \_\_\_\_\_ (in Chinese)
2. **Date of Birth:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (dd/mm/yy) 3. **I.D. Card No:** \_\_\_\_\_ (\_\_\_\_)
4. **Address:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ (Tel. No.: \_\_\_\_\_)
5. **Qualifications (if applicable) :** \_\_\_\_\_

**(A) University /Institute/ School etc.**

Name of University/Institute/ School	Degree/Cert./Dip.	Year Obtained	Major/Minor

### (B) Working Experience

Name of Institute/School	Type Aided/Govt./Private	Post	From dd/mm/yy	To dd/mm/yy	Full-time or Part-time

**(C) Public Examination (if applicable)**

Degree/Cert./Diploma obtained	Year	Subjects and grades			
		( )	( )	( )	( )
		( )	( )	( )	( )
		( )	( )	( )	( )
		( )	( )	( )	( )

- [illegible]

I declare that the particulars stated in items 1 to 5 above are true and correct.

Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

\* Delete where appropriate

### Notes for completing the Form

1. This form together with copy of certificates will be kept in school for Education Bureau's inspection/audit as and when required.
2. The personal data provided by means of this form will be used for appointment as a supply staff under the Code of Aid for Special Schools and other employment-related purposes.
3. The provision of personal data by means of this form is obligatory. If you do not provide sufficient information, school may not be able to process the appointment.
4. You have the right of access and correction with respect to personal data as provided for in sections 18 and 22 and Principle 6 of Schedule 1 of the Personal Data (Privacy) Ordinance. Your right of access includes the right to obtain a copy of your personal data provided by this form.
5. Enquiries concerning the personal data collected by means of this form, including the making of access and corrections, should be addressed to the school to which your form is submitted.

*Note: School head should check the supply staff's particulars in this form against originals.*



**Supply Teacher's Receipt**

Name:	
Date: From	To
No. of working days:	
Rate per day: \$	
Total Amount: \$	
<p style="text-align: center;">I confirm that I have received the above sum.</p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <span>Signature</span> <span>Date</span> </div>	

<div style="display: inline-block; transform: rotate(-45deg);"> Week Date Month </div>	S	M	T	W	H	F	S	Remarks

I certify that the amount payable to the above supply teacher is correct.

School head's signature: \_\_\_\_\_

Name of school: \_\_\_\_\_

Date: \_\_\_\_\_

\* Please note the school/public holidays in the Remarks column and mark the day(s) on which the supply teacher has actually work.

**Receipt of Non-teaching Supply Staff of Aided Special Schools**

Name:
Date:              From              to
No. of working days:
Rate per day: \$
Total Amount: \$
<p>I confirm that I have received the above sum.</p>          <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="text-align: center;"> <hr style="width: 150px; border: 0; border-top: 1px solid black;"/> <p>Signature</p> </div> <div style="text-align: center;"> <hr style="width: 150px; border: 0; border-top: 1px solid black;"/> <p>Date</p> </div> </div>

Week Date Month	S	M	T	W	H	F	S	*Remarks

I certify that the amount payable to the above supply staff is correct.

School head's signature: \_\_\_\_\_

Name of school: \_\_\_\_\_

Date: \_\_\_\_\_

\* Please note the school/public holidays in the Remarks column and mark the day(s) on which the supply staff has actually worked.

**To: Recurrent Subventions Section, Education Bureau**

**[Attn: AOI(RS)]**

**Aided Schools**

**Claim Form for Daily-Rated Supply Teacher and Substitute Teacher Grant (STG)**

(This form should be used by schools not receiving the Teacher Relief Grant)

School Name: \_\_\_\_\_ School Code: \_\_\_\_\_ Month: \_\_\_\_\_ Year: \_\_\_\_\_

I would like to request reimbursement of daily-rated supply teachers, employer's contributions to Mandatory Provident Fund (MPF) and/or Substitute Teacher Grant as follows: -

**Section A** Daily-rated supply teachers **not required** to contribute to MPF

Information of the Teacher on Leave						Information of the Supply Teacher					
Name	SRN <sup>1</sup>	Post	Leave Period		Reason for absence <sup>2</sup>	Name	Supply Period <sup>3</sup>		No. of Working Days <sup>4</sup> (a)	Daily Rate <sup>5</sup> \$ (b)	Salary Amount \$ (c) = (a) x (b)
			From dd/mm/yy	To dd/mm/yy			From dd/mm/yy	To dd/mm/yy			
<b>Total</b>											\$

**Section B** Daily-rated supply teachers **required** to contribute to MPF

Information of the Teacher on Leave						Information of the Supply Teacher								
Name	SRN <sup>1</sup>	Post	Leave Period		Reason for Absence <sup>2</sup>	Name	Supply Period <sup>3</sup>		No. of Working Days <sup>4</sup> (a)	Daily Rate <sup>5</sup> \$ (b)	Salary Amount \$ (c) = (a) x (b)	MPF Subsidy <sup>6</sup> \$	Contract Period <sup>6</sup>	
			From dd/mm/yy	To dd/mm/yy			From dd/mm/yy	To dd/mm/yy						
Total											\$	\$		

School Code: \_\_\_\_\_

**Section C** Substitute Teacher Grant (Vacancies arising from teachers on leave)

Information of the Teacher on Leave						Information of STG Calculation			
Name	SRN <sup>1</sup>	Post	Leave Period		Reason for Absence <sup>2</sup>	No. of Calendar Days	No. of Working Days <sup>4</sup> (a)	Rate per Day <sup>7</sup> \$ (b)	STG Amount \$ (c) = (a) x (b)
			From dd/mm/yy	To dd/mm/yy					
<b>Total</b>									\$

**Section D** Substitute Teacher Grant (Freezing of teaching posts on the approved establishment)

No. of Posts Claimed [Specify the Rank]	Period		No. of Calendar Days	No. of Working Days <sup>4</sup> (a)	Rate per day <sup>7</sup> \$ (b)	STG Amount \$ (c) = (a) x (b)
	From dd/mm/yy	To dd/mm/yy				
<b>Total</b>						\$

Notes:

- Enter Staff Reference Number of teachers on leave.
- Enter the **alphabet** from the list of reasons for absence below –
  - paid sick/maternity/special tuberculosis leave;
  - paid study leave;
  - paid leave for teachers for juror or witness service;

School Code: \_\_\_\_\_

- (d) paid leave for a maximum of 14 days per school year for special events as specified in the Annex to EDB Circular No. 1/2006;
- (e) other paid leave (**please specify the reason**);
- (x) no-pay sick/maternity/special tuberculosis leave; and
- (z) other no-pay leave.

Please note that granting of leave should follow EDB Circular No. 1/2006.

3. For supply teachers who have participated in the Early Retirement Scheme for aided primary/secondary school teachers, please note that they are only allowed to take up daily-rated part-time jobs of a duration of not more than 90 days each as set out in EDB Circular No. 5/2005 and Annex 1 to EDB Circular Memorandum No. 9/2012.
4. The number of working days should exclude Sunday, Saturday (short-week), public holidays, discretionary holidays or any days on which the teachers are not required to perform duties.
5. Please refer to the relevant EDB circular memorandum on the prevailing daily rates of pay for supply teachers in aided schools.
6. For supply period less than 60 calendar days yet the supply teacher is required to contribute to MPF (5% of the monthly salary capped at maximum amount stipulated under prevailing MPF regulations), please provide supporting information and the relevant contract period.
7. Please refer to EDB Circular No. 60/1999 on rates per day for STG and the relevant EDB circular memorandum on the prevailing daily rates of pay for supply teachers in aided schools.
8. For school joining the Voluntary Optimisation of Class Structure Scheme, the approved teaching staff establishment includes all regular posts approved in the normal teaching staff establishment and the teaching post quota provided in that school year.

---

I certify that \* -

*(Item (i) to (ii) for employment of supply teacher under Section A and/or Section B only)*

- (i) the emoluments have been paid to the supply teacher and/or MPF scheme trustee concerned and relevant receipts being attached for your records;
- (ii) the school has no / \_\_\_\_\* surplus teachers and the number of surplus teachers has been offset before employing any supply teachers<sup>Note 1</sup>;

*(Item (iii) to (vi) for the claim of STG under Section C and/or Section D only)*

- (iii) consent has been obtained from my school's SMC for claiming STG in the school year;

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<sup>Note 1</sup> Aided secondary schools have to offset, in order of priority, (a) the fractional staff entitlement; (b) the Senior Secondary Curriculum Support Grant (SSCSG); and (c) the provision of supply teachers by the surplus teaching posts during the 5-year transitional period for surplus teacher under the New Senior Secondary Academic Structure as specified in para. 8 of EDB Circular No. 6/2007 and the toleration period under the Voluntary Optimisation of Class Structure Scheme as specified in para. 4 and 5 of EDB Circular Memorandum No. 190/2010.

School Code: \_\_\_\_\_

- (iv) no salaries grant of teachers filling the vacant posts have been claimed;
- (v) the total number of posts \_\_\_\_\_ claiming STG including those under Section (C) teachers on leave \_\_\_\_\_ and (D) the teaching posts on the approved establishment \_\_\_\_\_ **does not exceed the ceiling of 10% of the approved teaching staff establishment<sup>Note 2</sup> of my school (Graduate posts: \_\_\_\_\_; Non-graduate posts: \_\_\_\_\_; Total: \_\_\_\_\_) at the claim date** and this request for payment complies with the conditions set out in EDB Circular No. 60/1999.  
*(Please enter number of posts in the space provided);*
- (vi) except the surplus teacher situation mentioned in (ii) above, the sum of the total number of posts claiming STG and the strength of my school would not exceed the approved teaching staff establishment<sup>Note 2</sup> at any point in time; and

*(Item (vii) applies to all Sections)*

- (vii) no duplicate claim has been made for government subventions on account of the same leave/vacancy/frozen period set out in Sections A to D, such as the encashment of Additional Teaching Posts for English and the fractional staff entitlement for claiming Fractional Post Cash Grant.

My school will refund to the Education Bureau any over-payment of grant.

(School Chop)

Signature of Supervisor/School Head: \_\_\_\_\_

Name of Supervisor/School Head: \_\_\_\_\_ Date: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Tel No. \_\_\_\_\_

c.c. SSDO( )

\* delete as appropriate

<sup>Note 2</sup> For schools joining the Voluntary Optimisation of Class Structure Scheme, the approved teaching staff establishment includes all regular posts approved in the normal teaching staff establishment and the teaching post quota provided in that school year.

## Claim Form for Daily-Rated Supply Non-Teaching Staff

(This claim form should also be used for supply Laboratory Technician)

School Name: \_\_\_\_\_ School Code : \_\_\_\_\_ Month : \_\_\_\_\_ Year : \_\_\_\_\_

I would like to request reimbursement of daily-rated supply non-teaching staff and/or employer's contributions to Mandatory Provident Fund (MPF) as follows –

### Section A Daily-rated supply non-teaching staff **not required** to contribute to MPF

Non-teaching staff on leave			Leave period		Reason for absence <sup>2</sup>	Name of supply staff	Supply period		No. of working day <sup>3</sup>	Daily rate <sup>4</sup> \$	Salary amount \$
Name	SRN <sup>1</sup>	Post	From	To			From	To			
<b>Total</b>											

### Section B Daily-rated supply non-teaching staff **required** to contribute to MPF

Non-teaching staff on leave			Leave period		Reason for absence <sup>2</sup>	Name of supply staff	Supply period		No. of working days <sup>3</sup>	Daily rate <sup>4</sup> \$	Salary amount \$	MPF subsidy <sup>5</sup> \$	Contract period	
Name	SRN <sup>1</sup>	Post	From	To			From	To					From	To
<b>Total</b>														

Note:

1. Enter Staff Reference Number of non-teaching staff on leave.
2. Enter the **alphabet** from the list of reasons for absence below -

For specialist staff/laboratory technician,

- (a) paid sick/maternity/special tuberculosis leave;
- (b) other paid leave (**Please specify the reason**);
- (x) no-pay sick/maternity/special tuberculosis leave;
- (z) other no-pay leave.

For other non-teaching staff,

- (c) paid sick/maternity leave;
- (d) other paid leave (**Please specify the reason**);
- (y) no-pay sick/maternity leave; and
- (z) other no-pay leave.

Please note that granting of leave should follow EDB Circular No. 1/2006.

3. The number of working days should exclude Sunday, Saturday (short-week), public holidays, discretionary holidays or any days on which the non-teaching staff is not required to perform duties.
4. Please refer to the relevant EDB circular memorandum on the prevailing daily rates of pay for supply teachers and supply staff in aided schools..
5. For supply period less than 60 calendar days yet the supply non-teaching staff is required to contribute to MPF, please provide supporting information.

I certify that –

- (i) the emoluments have been paid to the supply non-teaching staff and/or MPF scheme trustee concerned, relevant receipts being attached for your records; and
- (ii) no duplicate claim has been made for government subventions on account of the same leave set out in Sections A and B.

My school will refund to Government any over-payment of grant.

Signature of Supervisor/School Head : \_\_\_\_\_

Name of Supervisor/School Head : \_\_\_\_\_ Date : \_\_\_\_\_

Contact Person: \_\_\_\_\_ Tel No.: \_\_\_\_\_

(School chop)

c.c. SSDO( )



## **Personal Information Collection Statement**

### **Purpose of Collection**

1. The personal data provided by you in this form will be used by the EDB for one or more of the following purposes:
  - (a) Activities relating to the processing, authentication and counter-checking of the form for reimbursement of daily-rated supply non-teaching staff and/or employer's contributions to Mandatory Provident Fund;
  - (b) Activities relating to matching of the personal data with the database of other relevant Government bureaux / departments in connection with the processing, authentication and counter-checking of the form mentioned in (a) above;
  - (c) Activities relating to matching of the personal data within the database of the EDB for purposes of verifying / updating records of the EDB;
  - (d) Activities relating to training and development including invitation of participation in programmes/activities, applications for reimbursement of course fees, assessment of nominations, awards and scholarship, and monitoring of attainment progress;
  - (e) Activities relating to the processing and vetting of applications for, and disbursement of, funding / grants / subsidies, and conducting of audits;
  - (f) Activities relating to compilation of statistics, research and Government publications; and
  - (g) Activities relating to the administration and enforcement of rules and regulations including the Education Ordinance (Cap. 279), its subsidiary legislation (such as the Education Regulations and the Grant/Subsidized Schools Provident Fund Rules) and the Codes of Aid.
2. The provision of personal data required by this form and during the processing of this form is obligatory. In the event that you do not provide those personal data, we may not be able to handle or further process the form.

### **Classes of Transferees**

3. The personal data you provide will be made available to persons working in the EDB. Apart from this, they may be transferred or disclosed to the parties or in the circumstances listed below:
  - (a) other Government bureau and departments for the purposes mentioned in paragraph 1 above;
  - (b) the school in which the form relates for the purposes mentioned in paragraph 1 above;
  - (c) where you have given your prescribed consent to such disclosure; and
  - (d) where such disclosure is authorised or required under the law or court order applicable to Hong Kong.

### **Access to Personal Data**

4. You have the right to request access to and correction of your personal data held by the EDB. Request for access or correction of personal data should be made in writing to the respective Senior School Development Officer by post to the Regional Education Office at the address on the EDB website (<https://www.edb.gov.hk/en/contact-us/reo.html>) or email to [edbinfo@edb.gov.hk](mailto:edbinfo@edb.gov.hk).

**Acting Appointment, Staff Promotion and Regrading (standard claim forms for salary grant)**

Schools may access the following appointment-related forms on the “Appointment Matters” website in the Education Bureau’s homepage (Home > School Administration and Management > Administration > About School Staff > [Appointment Matters](#)).

- Staff Promotion
- Acting Appointment (for Substantive Appointment)
- Acting Appointment (for Administrative Convenience)
- Acting Appointment (Notification of Change in Acting-up Rate from 90% to 100%)
- Notification of Adjustment of Acting Allowance of Teacher on Acting Appointment Taking Leave/Absence for More than 3 Consecutive Days
- Regrading to Graduate Teachers in Secondary Schools
- Regarding to Graduate Teachers in Primary Schools

**Claim Form for Provisional Annual Employer's Provident Fund (PF)/Mandatory Provident Fund (MPF) Contributions  
under Administration Grant/Revised Administration Grant  
- Aided Primary Schools**

**Name of School:** \_\_\_\_\_ **School Code:** \_\_\_\_\_ **School Year:** \_\_\_\_\_  
**Grant applicable to the school**    ☐ Administration Grant <sup>#</sup>    ☐ Revised Administration Grant    (Please tick as appropriate)

Rank	No. of Staff	Provisional Total Annual Salary for the school year (\$)	Provisional Annual Employer's PF/MPF Contributions (\$)
1.			
2.			
3.			
4.			
5.			
<b>Total for the school year</b>			
<b>Total for last school year</b>			

I certify that staff paid under Administration Grant/Revised Administration Grant will –

- a) receive salaries, less their employee's PF contribution at 5% or MPF contributions which is capped at the amount as stipulated in MPF Ordinance, where appropriate, in the coming school year.
- b) receive employer's provident fund contributions on the basis of the respective employee's continuous contributory service under the condition of the approved scheme and the conditions to be met for higher rate of employer's PF contribution as stated in the prevailing EDB circular(s) on the funding of retirement benefits for staff of aided schools.

I understand that subsidy will only be provided for PF/MPF contributions in respect of staff employed within the provision allocated for Administration Grant / Revised Administration Grant and EDB will reimburse the shortfall of the actual employer's PF contributions or clawback the unspent balance, where appropriate, based on audited accounts. The data collected in this form is used for calculation of the provisional annual employer's PF/MPF contributions and other related purposes. It may be disclosed to the other Government bureaux/departments/agencies for audit/statistical purposes.

Signature of Supervisor/School Head: \_\_\_\_\_

Name of Supervisor/School Head: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_  
School Chop

Contact Person: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

<sup>#</sup> There is no PF / MPF subsidy for staff employed under the Administration Grant for Additional Clerical Assistant for aided primary schools.

**Claim Form for Provisional Annual Employer's Provident Fund (PF)/Mandatory Provident Fund (MPF) Contributions  
under Administration Grant/Revised Administration Grant  
- Aided Secondary Schools**

**Name of School:** \_\_\_\_\_ **School Code:** \_\_\_\_\_ **School Year:** \_\_\_\_\_  
**Grant applicable to the school**    ☐ Administration Grant    ☐ Revised Administration Grant    (Please tick as appropriate)

Rank	No. of Staff	Provisional Total Annual Salary for the school year (\$)	Provisional Annual Employer's PF/MPF Contributions (\$)
1.			
2.			
3.			
4.			
5.			
<b>Total for the school year</b>			
<b>Total for last school year</b>			

I certify that staff paid under Administration Grant/Revised Administration Grant will –

- a) receive salaries, less their employee's PF contribution at 5% or MPF contributions which is capped at the amount as stipulated in MPF Ordinance, where appropriate, in the coming school year.
- b) receive employer's provident fund contributions on the basis of the respective employee's continuous contributory service under the condition of the approved scheme and the conditions to be met for higher rate of employer's PF contribution as stated in the prevailing EDB circular(s) on the funding of retirement benefits for staff of aided schools.

I understand that subsidy will only be provided for PF/MPF contributions in respect of staff employed within the provision allocated for Administration Grant / Revised Administration Grant and EDB will reimburse the shortfall of the actual employer's PF contributions or clawback the unspent balance, where appropriate, based on audited accounts. The data collected in this form is used for calculation of the provisional annual employer's PF/MPF contributions and other related purposes. It may be disclosed to the other Government bureaux/departments/agencies for audit/statistical purposes.

Signature of Supervisor/School Head: \_\_\_\_\_

Name of Supervisor/School Head: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_  
School Chop

Contact Person: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

**Claim Form for Provisional Annual Employer's Provident Fund (PF)/Mandatory Provident Fund (MPF) Contributions  
under Administration Grant/Revised Administration Grant  
- Aided Special Schools**

**Name of School:** \_\_\_\_\_ **School Code:** \_\_\_\_\_ **School Year:** \_\_\_\_\_  
**Grant applicable to the school**    ☐ Administration Grant <sup>#</sup>    ☐ Revised Administration Grant    (Please tick as appropriate)

Rank	No. of Staff	Provisional Total Annual Salary for the school year (\$)	Provisional Annual Employer's PF/MPF Contributions (\$)
1.			
2.			
3.			
4.			
5.			
<b>Total for the school year</b>			
<b>Total for last school year</b>			

I certify that staff paid under Administration Grant/Revised Administration Grant will –

- a) receive salaries, less their employee's PF contribution at 5% or MPF contributions which is capped at the amount as stipulated in MPF Ordinance, where appropriate, in the coming school year.
- b) receive employer's provident fund contributions on the basis of the respective employee's continuous contributory service under the condition of the approved scheme and the conditions to be met for higher rate of employer's PF contribution as stated in the prevailing EDB circular(s) on the funding of retirement benefits for staff of aided schools.

I understand that subsidy will only be provided for PF/MPF contributions in respect of staff employed within the provision allocated for Administration Grant / Revised Administration Grant and EDB will reimburse the shortfall of the actual employer's PF contributions or clawback the unspent balance, where appropriate, based on audited accounts. The data collected in this form is used for calculation of the provisional annual employer's PF/MPF contributions and other related purposes. It may be disclosed to the other Government bureaux/departments/agencies for audit/statistical purposes.

Signature of Supervisor/School Head: \_\_\_\_\_

Name of Supervisor/School Head: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_  
School Chop

Contact Person: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

<sup>#</sup> There is no PF / MPF subsidy for staff employed under the Administration Grant for Additional Clerical Assistant for aided primary schools.

**Application for Payment of Non-recurrent Furniture & Equipment Subsidy  
Based on Approved Tender/Quotation Sum**

**To: Permanent Secretary for Education  
(Attn: Subvention Accounts Section)**

I would like to apply for non-recurrent F&E subsidy as shown below. The tender/quotation for purchases covered by the subsidy has been approved in accordance with the "Guidelines on Tendering and Purchasing Procedures in Aided Schools (July 1999) issued by Education Bureau (EDB) .

**Total Amount of Subsidy applied for: \$\_\_\_\_\_** *(Please provide breakdown in Part B)*

**Part A: Type of Subsidy (only tick one box):**

- 1 ☐ Set-up Fund Account with government subsidy
- 2 ☐ School Improvement Programme
- 3 ☐ F&E lost due to theft/burglary/natural disasters (\*Financial Year: \_\_\_\_\_)
- 4 ☐ New Technical Curriculum (\*Financial Year: \_\_\_\_\_)
- 5 ☐ Activity Approach (equipment grant only) (\*Financial Year: \_\_\_\_\_)
- 6 ☐ Intensive Remedial Teaching Programme (\*Financial Year: \_\_\_\_\_)
- 7 ☐ A-level Engineering Science (\*Financial Year: \_\_\_\_\_)
- 8 ☐ Library grant for adopting Chinese as the medium of instruction  
(\*Financial Year: \_\_\_\_\_)
- 9 ☐ Second Loop System for adopting Chinese as the medium of instruction  
(\*Financial Year: \_\_\_\_\_)
- 10 ☐ Whole-day primary schooling (tables & benches) (\*Financial Year: \_\_\_\_\_)
- 11 ☐ Air-conditioners for staff rooms (\*Financial Year: \_\_\_\_\_)
- 12 ☐ School Support Scheme (Psychologist Service)
- 13 ☐ Computer Studies Scheme for secondary and special schools
- 14 ☐ CAD, CAM and CAL software packages for schools providing prevocational curriculum
- 15 ☐ AS-level Computer Applications
- 16 ☐ AS-level Electronics
- 17 ☐ A-level Computer Studies
- 18 ☐ Others (please specify): \_\_\_\_\_

\* The financial year in which approval of the subsidy has been given.

**Part B: List of Furniture and Equipment Items with Tenders/Quotations Approved by School**

Item	Amount (HK\$)
TOTAL :	

I certify that: -

- (a) the F&E items purchased are eligible for government subsidy (EDB approval ref. # \_\_\_\_\_);
- (b) the tender/quotation for these purchases have been arranged in strict accordance with the required tendering and purchasing procedures;
- (c) the ceiling of the subsidy is not exceeded; and
- (d) the claim for subsidy for these items has not been made before.

School Name (English): \_\_\_\_\_

School Address (English): \_\_\_\_\_

School Code: \_\_\_\_\_ School File Reference: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

\_\_\_\_\_  
Name of Supervisor/Principal

\_\_\_\_\_  
Signature of Supervisor/Principal

\_\_\_\_\_  
School Chop

\_\_\_\_\_  
Date

**Important Notes on Completing the Application Form**

- (1) Each application should cover payment for one type of subsidy only. The Application Form will be returned to the school for amendment if the claim involves more than one type of subsidies.
- (2) If the space in Part B is insufficient, the list of items should be provided in a separate sheet.
- (3) If the amount shown in Part B is not in Hong Kong dollars, please indicate the currency used.
- (4) The School File Reference must be provided to facilitate enquiries.

# Approval reference of EDB or the then ED, where appropriate

# AIDED PRIMARY SCHOOLS

## MAJOR REPAIRS/ALTERATIONS - ESTIMATES 20XX-20XX

(to be completed in triplicate)

PAGE 1 OF \_\_\_\_\_  
(COVERING SHEET)

SECTION A (To be completed by school)				
NAME OF SCHOOL	<div style="border-bottom: 1px solid black; margin-bottom: 5px;">(Chinese)</div> <div style="border-bottom: 1px solid black;">(English)</div>			
EDUCATION DISTRICT				
ADDRESS				
TYPE OF SCHOOL (Please tick as appropriate)	ESTATE NON- ESTATE  <input type="checkbox"/>	ESTATE  <input type="checkbox"/>	PRIMARY FEE CHARGING  <input type="checkbox"/>	PRIMARY NON-FEE CHARGING  <input type="checkbox"/>
NAME OF PRINCIPAL			TEL. NO.	
NAME OF SUPERVISOR _____ SIGNATURE  <div style="text-align: center; margin: 10px 0;">DATE</div> FOR APPOINTMENT TO VISIT SCHOOL PLEASE CONTACT :  <div style="display: flex; justify-content: space-between;"> <span>NAME Mr/Ms _____</span> <span>Tel. No. _____</span> </div>				

SECTION B (To be completed by ASD/HD*)			
CONTRACT AREA/ESTATE			
LOCATION CODE/ SCHOOL KEY			
CONTACT OFFICER		TEL.	
DATE OF ESTIMATES			
ESTIMATES PREPARED BY			
TOTAL ESTIMATES			

SECTION C (To be completed by EDB)
APPROVED SUBSIDY \$ _____ DATE _____  SIGNATURE _____ NAME _____ <div style="text-align: center; margin-top: 5px;">(for Secretary for Education)</div>



**AIDED PRIMARY SCHOOLS**  
**MAJOR REPAIRS/ALTERATIONS - ESTIMATES 20XX-20XX**

(to be completed in triplicate)

PAGE \_\_\_\_\_ OF \_\_\_\_\_  
 (CONTINUATION SHEET)

Name of School : \_\_\_\_\_

SECTION A (To be completed by school)			
DETAILS OF WORKS REQUIRED			
ITEM NO.	LOCATION	DETAILS OF WORKS WITH APPROXIMATE QUANTITY (Please underline works related to non-school portion)	REASON FOR REQUEST

SECTION B (To be completed by ASD/HD*)				
ESTIMATES / REMARKS				
WORKS TYPE	BUILDING WORKS	BUILDING SERVICES	TOTAL*	REMARKS (IF ANY)
TOTAL FOR THIS PAGE				

\* For estate schools, 20% on-cost included and the estimates/ remarks will be listed in a computer print-out.

WORKS TYPE: RA = Repairs which are essential

RB = Repairs which are desirable but not essential

RC = Repairs which are not necessary (Note : Estimates are not required for works classified as RC)

MA = Improvement items which are essential

MB = Improvement items which are desirable but not essential

# AIDED SPECIAL /SKILLS OPPORTUNITY SCHOOLS

## MAJOR REPAIRS/ALTERATIONS - ESTIMATES 20XX-20XX

(to be completed in triplicate)

PAGE 1 OF \_\_\_\_\_

(COVERING \_\_\_\_\_ SHEET)

SECTION A (To be completed by school)				
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	<div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px;"></div>			
EDUCATION DISTRICT				
ADDRESS				
TYPE OF SCHOOL (Please tick as appropriate)  NOTE: Please use separate application form for applying M R for both school & boarding sections	ESTATE NON-  <input type="checkbox"/>	ESTATE  <input type="checkbox"/>	SCHOOL SECTION  <input type="checkbox"/>	BOARDING SECTION  <input type="checkbox"/>
NAME OF PRINCIPAL			TEL. NO.	
NAME OF SUPERVISOR _____ SIGNATURE				
DATE				
FOR APPOINTMENT TO VISIT SCHOOL PLEASE CONTACT :				
NAME Mr/Ms _____ Tel. No.				

SECTION B (To be completed by ASD/HD*)			
CONTRACT AREA/ESTATE			
LOCATION CODE/ SCHOOL KEY			
CONTACT OFFICER		TEL.	
DATE OF ESTIMATES			
ESTIMATES PREPARED BY			
TOTAL ESTIMATES			

SECTION C (To be completed by EDB)
APPROVED SUBSIDY \$ _____ DATE
SIGNATURE _____ NAME <div style="text-align: center; font-size: small;">(for Secretary for Education)</div>

**AIDED SPECIAL /SKILLS OPPORTUNITY SCHOOLS**  
**MAJOR REPAIRS/ALTERATIONS - ESTIMATES 20XX-20XX**

(to be completed in triplicate)

PAGE \_\_\_\_\_ OF \_\_\_\_\_

(CONTINUATION SHEET)

Name of School : \_\_\_\_\_

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SECTION B (To be completed by ASD/HD*)				
ESTIMATES / REMARKS				
WORKS TYPE	BUILDING WORKS	BUILDING SERVICES	TOTAL*	REMARKS (IF ANY)
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# AIDED SECONDARY SCHOOLS

## MAJOR REPAIRS/ALTERATIONS - ESTIMATES 20XX-20XX

(to be completed in triplicate)

PAGE 1 OF \_\_\_\_\_

(COVERING SHEET)

SECTION A (To be completed by school)				
NAME OF SCHOOL	<div style="border-bottom: 1px solid black; margin-bottom: 5px;">(Chinese)</div> <div style="border-bottom: 1px solid black;">(English)</div>			
EDUCATION DISTRICT				
ADDRESS				
TYPE OF SCHOOL (Please tick as appropriate)  NOTE: Please use separate application form for applying M R for both school & boarding sections	ESTATE <input type="checkbox"/> NON-EST <input type="checkbox"/> ATE <input type="checkbox"/>	SCHOOL SECTION <input type="checkbox"/>	BOARDING SECTION <input type="checkbox"/>	
NAME OF PRINCIPAL			TEL. NO.	
NAME OF SUPERVISOR _____ SIGNATURE _____  DATE _____  FOR APPOINTMENT TO VISIT SCHOOL PLEASE CONTACT :  NAME Mr/Ms _____ Tel. No. _____				

SECTION B (To be completed by ASD/HD*)			
CONTRACT AREA/ESTATE			
LOCATION CODE/ SCHOOL KEY			
CONTACT OFFICER		TEL.	
DATE OF ESTIMATES			
ESTIMATES PREPARED BY			
TOTAL ESTIMATES			

SECTION C (To be completed by EDB)
APPROVED SUBSIDY \$ _____ DATE _____   SIGNATURE _____ NAME _____ <div style="text-align: center; font-size: small;">(for Secretary for Education)</div>

**AIDED SECONDARY SCHOOLS**  
**MAJOR REPAIRS/ALTERATIONS - ESTIMATES 20XX-20XX**

(to be completed in triplicate)

PAGE \_\_\_\_\_ OF \_\_\_\_\_  
 (CONTINUATION SHEET)

Name of School : \_\_\_\_\_

SECTION A (To be completed by school)			
DETAILS OF WORKS REQUIRED			
ITEM NO.	LOCATION	DETAILS OF WORKS WITH APPROXIMATE QUANTITY (Please underline works related to non-school portion)	REASON FOR REQUEST

\* For estate schools, 20% on-cost included and the estimates/ remarks will be listed in a computer print-out.

SECTION B (To be completed by ASD/HD*)				
ESTIMATES / REMARKS				
WORKS TYPE	BUILDING WORKS	BUILDING SERVICES	TOTAL*	REMARKS (IF ANY)
<b>TOTAL FOR THIS PAGE</b>				

WORKS TYPE: RA = Repairs which are essential  
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