Gifted Education Fund
Application for Funding Support to Provide
Off-school Advanced Learning Programmes for Gifted Students

Guide to Applicants

1. Objective

1.1 The allocation of funding from the Gifted Education Fund ("GE Fund" hereafter) to proposals of off-school advanced learning programmes [1] ("OSALPs" hereafter) is to support the provision of quality education programmes for gifted students by different organisations in Hong Kong.

2. Background

2.1 The Education Bureau (EDB) first set up the GE Fund in 2016 and has injected $1.6 billion into the Fund as at early 2023. Investment income generated from the Fund is used to enhance the services of The Hong Kong Academy for Gifted Education (HKAGE) [2] and provide resources to implement measures recommended by the Advisory Committee on Gifted Education (ACGE) [3], including offering quality advanced learning programmes for gifted students at primary and secondary levels by different gifted education service providers. Since 2019/20 school year, a variety of OSALPs funded by the GE Fund have been organised for gifted students to further unleash their potential.

3. Eligibility for Application

3.1 The four types of organisations below are eligible to apply for the GE Fund to offer OSALPs:

    (a) Post-secondary institutions (including related faculties, departments, centres, etc. or staff supported by respective unit of the post-secondary institution)

    (b) Non-government organisations (NGOs)

    (c) Professional bodies

    (d) Technology enterprises

3.2 Application can be submitted by one organisation or in collaboration with other eligible organisation(s), if appropriate. Programmes that involve supporting organisation(s) would

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[1] Off-school advanced learning programmes for gifted students refer to education programmes designed to expose gifted students to high quality and challenging learning experiences in their areas of talent or, where suitable, in a wider range of disciplines or even across disciplines.

[2] The Hong Kong Academy for Gifted Education went into operation in 2008 to provide off-school gifted education services and has become a subvented organisation of the Education Bureau since 2017.

[3] The Advisory Committee on Gifted Education was set up in 2017 to advise the Secretary for Education on, apart from the use and management of the Gifted Education Fund, development of gifted education in Hong Kong as well as measures and initiatives for promoting gifted education.

foster collaboration among organisations of different backgrounds in developing learning and teaching activities that have wide coverage of subject areas or offer cross-disciplinary learning/ research opportunities useful for broadening the perspectives of gifted students.

4. Priority Themes

4.1 Priority consideration will be given to the applicant organisations with proposals under any of the themes categorised into the following four strands:

(a) STEAM-related Mentorship Programmes
- To provide programmes for students to assist in projects under mentorship of academics/ scientists in post-secondary institutions and/ or professionals of the industries in the areas of, including but not limited to:
  - Biotechnology
  - Artificial intelligence
  - Smart city
  - Financial technologies (Fintech)
  - IT security
  - Aerospace technologies
  - Art technologies (Art tech)
  - Sports technologies (Sports tech) or sports science

(b) Humanities and Social Science Research Programmes
- To provide programmes or research activities on education, history and cultural heritage, environment, urban planning, psychology, linguistics, etc.

(c) Apprenticeship and Entrepreneurship Programmes
- To provide authentic work experience, targeted for senior secondary students, at corporations in the fields of finance and information technology, legal services, construction and architecture, medical and healthcare services, engineering and surveying, journalism, art and design, etc.

(d) Self-initiated Research Studies
- To provide learning opportunities for gifted students to conduct research in areas of their interest under the guidance of academics and/ or professionals.

The proposals submitted may cover more than one theme/ area/ discipline mentioned above.

5. Target Beneficiary

5.1 The OSALPs are designed for gifted students from primary and secondary schools in Hong Kong. Schools will be requested to identify and nominate students to apply for the programmes. Parents or guardians can also help their children to apply for the programme(s). In the latter case, schools are only required to acknowledge the application.

5.2 For effective promotion of the programme to schools and recruitment of student applicants, the applicant organisation should indicate in the application form its current networks with primary and secondary schools. If the applicant organisation does not have any established network at the time of application, it should propose a plan to show how it would promote the programme to schools when the programme is launched. The successful applicant organisations would each propose a selection mechanism and confirm the eligibility/ suitability of the applicants to participate in the programmes after studying the application forms and the supporting documents/ arranging a short test / conducting an interview with the students.

5.3 In general, for programmes that involve large-class teaching/ lectures, to cater for learner diversity, the proposed target beneficiary should fall within the same Key Stage[4] or differs in class levels of no more than three years. For wider spread in age, an applicant organisation may propose separate classes for students of different age groups to assure the learning and teaching effectiveness.

5.4 In order that more gifted students can benefit from OSALPs, The GE Fund Secretariat may refer to the Hong Kong Academy for Gifted Education (HKAGE) programmes that are considered suitable for further development. By submitting an application for funding support under the Gifted Education Fund to organise an OSALP, applicant organisations should understand and agree that HKAGE may approach them for potential collaboration.

6. Programme Period and Scale of Programme

6.1 The delivery period of the proposed programme should last from 6 to 9 months. In addition, a preparation period of at most 3 months should be arranged beforehand for the preparation work such as recruitment of training personnel, fixing the dates and venues for the lessons, announcement and publicity of the programme, process of applications and selection of students, and preparation of learning and teaching materials. In general, programmes usually commence in May or June every year.

6.2 The programme scale varies according to the programme design, number of gifted student participants to serve, duration of the programme, frequency of meeting the students, whether participation in local/ international events is involved, etc. There is no restriction on the scale of each proposed programme. Due care, however, needs to be taken during programme design to avoid overloading the gifted student participants.

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[4] Key Stage refers to the 4 stages of schooling from primary to secondary: Key Stage 1 (junior primary P1-P3), Key Stage 2 (senior primary P4-P6), Key Stage 3 (junior secondary S1-S3) and Key Stage 4 (senior secondary S4-S6) [extracted from the Basic Education Curriculum Guide - To Sustain, Deepen and Focus on Learning to Learn (Primary 1 - 6)].

7. Budget Planning

7.1 An applicant organisation needs to provide a detailed budget plan with clear breakdown of various expenses in the programme. The budget items should be classified into six categories, namely, staff cost, equipment, services, general expenses, contingency and others. The applicant organisation should refer to the Guidelines on Budget Planning in **Annex I** for details about the requirements when budgeting for the programme.

8. Form and Reference

8.1 Applications should be made by completing the prescribed paper application form (GEForm_2023) **or** electronic form (eForm_91), either English or Chinese version. Both the application form (GEForm_2023) and (eForm_91) can be downloaded **or** submitted via the webpage of Application for Funding Support to

Provide Off-school Advanced Learning Programmes for Gifted Students

(https://www.edb.gov.hk/en/curriculum- development/curriculum-area/gifted/ge_fund/gef/asp.html). Please note that the application form this year has been updated and **previous application forms are no longer valid and acceptable**. Apart from this guide, the document "Frequently Asked Questions and Answers" about the OSALPs and other documents on the webpage may provide valuable information to an applicant organisation when completing the form. Where necessary, the applicant organisation may be later asked to provide further information to facilitate consideration of the application.

9. Assessment of Proposals

9.1 All proposals received will be passed to the ACGE for consideration.

9.2 Prior to making its recommendation, the ACGE would vet the proposals received. Applicant organisations may be invited to present or further elaborate on their proposal(s) and/ or answer questions from the ACGE members on a need basis.

9.3 The programmes recommended by the ACGE will be submitted to the Secretary for Education or his/ her delegate for deliberation. Approval of funding will be issued to successful applicant organisations who are each required to sign a service agreement beforehand with the Grantor represented by the Permanent Secretary for Education Incorporated.

10. Assessment Criteria

10.1 Priority consideration will be given to programmes that are in line with the themes set out in paragraph 4 of this guide, and also those that can produce a desirable impact on nurturing the gifted student participants.

10.2 Programme proposals will be assessed in accordance with, but not limited to, the criteria under the following three major areas:

(I) Programme Needs

- Rationale

  The needs of gifted students should be identified and substantiated with evidence.

- Goals and Objectives

  Programme goals and objectives should be clear and specific, and in line with the aims and ambits of the GE Fund and relevant government policy initiatives.

- Knowledge, Skills, Values and Attitudes

  Apart from developing the knowledge and skills of gifted students, the designed programmes should also nurture their positive values and attitudes. To enhance the support of the twice-exceptional students, it would be desirable to include elements of affective education in the programmes.

(II) Programme Feasibility

- Target Beneficiary

  Target group(s) and expected number of gifted student participants should be clearly stated, together with elaboration on how the programme can benefit the target group(s). The proposed selection mechanism should be straightforward, unbiased and effective in identifying the right students to participate in the given programme. As gifted students may have different abilities, interests, aptitudes and learning styles, an applicant organisation should propose appropriate strategies to cater for the learner diversity in the proposal, e.g. arrangement of sufficient helpers/ mentors to support the students.

- Feasibility and Sustainability

  The programme proposals should be well-structured with a clear and workable implementation plan within a reasonable timeframe. The plan should comprise detailed information about the content/ learning activities/ mode/ sessions pitched at appropriate level, roles and duties of qualified tutors/ instructors/ counsellors/ professionals/ mentors, etc. involved in the programme, alongside a detailed budget plan with justifications, clear expenditure items with breakdown in appropriate categories and at different implementation stages. When drafting the budget plan, apart from referring to the Guidelines on Budget Planning in **Annex I** of this guide, documents in the annexes of **Schedule III** of the sample service agreement such as the Guidelines on Management and Monitoring, Principles of Allowable Costs, etc. would serve as good references.

- Capability of Applicant Organisation(s)

  An applicant organisation should show its competence by elaborating on its expertise in relevant fields and education, experiences in research/ product development/ education/ student support/ resources development and usage, networking professionals/

entrepreneurs/ academics/ education sectors, etc.

(III) Expected Programme Outcomes

- Expected Learning Outcomes/ Tangible Deliverables
  The expected learning outcomes/ tangible deliverables of the students should closely align with the programme objectives and have a positive impact on the gifted student participants, and are worthy of promulgation and further development in future. The expected learning outcomes/ tangible deliverables should be clearly stated in the proposal. To protect the environment, printing booklets to document/ showcase students' work should be avoided. An EDB webpage is available to display their deliverables in digital form for easy access by the public.

- Programme Evaluation and Quality Assurance
  An applicant organisation needs to assure the quality of the programme. A pertinent and clearly elaborated quality assurance mechanism should be proposed and included in the proposal to highlight the means that will be adopted to assure the quality of the programme during implementation. The proposed evaluation method should be evidence-based with appropriate delineation of success criteria. An applicant organisation should conduct regular evaluation with students on their learning effectiveness and findings/ observations will need to be timely reflected in meetings and also in the interim/ final reports of the programme. Relevant details about the composition of the quality assurance team, the frequency and the modes of evaluation to be conducted should be indicated in the applicant form.

11. Responsibility of Applicant Organisation(s)

11.1 An applicant organisation should elaborate on its roles and those of the supporting organisation(s), if applicable, in the application form. The service agreement signed between the successful applicant organisation and the Grantor will set out in detail the clauses and conditions related to the disbursement and usage of the funding, the deliverables and the schedules for submission of reports. The application form first received by the EDB with clarifications, if applicable, will form part of the service agreement.

12. Programme Monitoring and Reports

12.1 The EDB will evaluate the quality and effectiveness of individual programme against the objectives, deliverables and learning outcomes as stated in the proposal. Possible measures including lesson observations, discussions/ meetings with successful applicant organisations, interviews with the gifted student participants (on a need basis) will be adopted to monitor and gather evidence to provide timely feedback to the successful applicant organisations.

13. Intellectual Property Rights and Publicity

13.1 The contents, the deliverables and the products developed from all programmes sponsored by the GE Fund, including but not limited to all texts, graphics, drawings, diagrams, photographs, audio and video recordings and compilation of data or other materials are owned by the EDB, unless otherwise specified.   Please refer to the sample service agreement of the programmes on the webpage of Programme Management and Monitoring of OSALPs (https://www.edb.gov.hk/en/curriculum-development/curriculum-area/gifted/ge_fund/gef/pmm.html) for details about the intellectual property rights requirements.

13.2 The EDB may take photographs or video record some of the lessons or learning and teaching activities for publicity purposes. Programme providers are requested to assist the EDB and obtain consents from parents or guardians on the filming arrangement beforehand. The photographs and video clips will be owned by the EDB.

14. Not a Binding Agreement

14.1 The information provided in this guide is by no means exhaustive. It will be timely updated whenever necessary. Nothing in this guide shall constitute a contract. Notwithstanding anything provided in other paragraphs of this guide, no binding agreement will be made between the Government and a successful applicant organisation unless and until an agreement is duly executed by all parties thereto. In case of doubt, the applicant organisation is welcome to contact the GE Fund Secretariat for clarification.

15. Collection of Personal Information

15.1 The GE Fund Secretariat will carefully handle the personal data provided in the application form and the proposal in accordance with the Personal Data (Privacy) Ordinance. Relevant policies are presented in the Personal Information Collection Statement in **Annex II** for information.

16. Enquiries

16.1 Enquiries about the application and related matters should be addressed to the GE Fund Secretariat [Attn.: Curriculum Development Officer (Gifted Education)10].

Address:	Gifted Education Fund Secretariat
	Room E328, 3/F, East Block,
	Education Bureau Kowloon Tong Education Services Centre,
	19 Suffolk Road, Kowloon Tong, Kowloon
Email:	cdoge10@edb.gov.hk
Telephone:	3698 3486
Fax:	2490 6858

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Gifted Education Fund Secretariat

July 2023

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Guidelines on Budget Planning

1. The principle of financial prudence and cost effectiveness of expenditure should be observed in budgeting. All programme funds must be exclusively used for the programme and spent within the programme period. Unused funds, if any, should be returned according to the terms in the service agreement.

2. An applicant organisation should present the budget in detail with a clear breakdown of expenditures and provide justifications. Item descriptions that are too brief and without justifications may not be considered for fund allocation. The applicant organisation should also refer to the general principles for determining allowable costs as stipulated in Schedule III of the service agreement.

3. When preparing the budget, an applicant organisation should make reference to the latest market price, including remuneration packages that are commensurate with the qualifications and experience of the proposed personnel. Strict economy should be exercised in handling any expenses to avoid lavishness.

4. Normally, the applicant organisation shall appoint a programme leader to oversee and lead the programme. <u>No award in the form of cash allowance to this person for whichever capacit(ies) he/ she may carry in the programme is permitted.</u> Should the normal duties of the programme leader be affected because of implementing the programme such as serving as an instructor/ a mentor, consideration should be made to redistribute his/ her duties instead of awarding cash allowance as remuneration to the programme leader.

5. All programme personnel, if employed on a full-time basis, should be remunerated on a fixed salary during the whole programme period. In normal circumstances, salary increment is not granted. Fringe benefits of staff, e.g. education allowance, medical insurance, housing allowance, etc. should not be included in or charged to the programme. Brief job descriptions and qualifications required for the programme personnel should be provided.

6. Some programmes may require the employment of short-term or part-time personnel, such as guest speakers, helpers and technicians to carry out duties specific to the programme. Salaries of such personnel should be calculated on a time-on-programme basis and commensurate with qualifications and experience. External tutors, instructors or speakers can be employed, if required. Remuneration for them should be calculated on an hourly

basis.

7. For necessary equipment items such as computers for use in the lessons, an applicant organisation should deploy existing resources for implementation of the proposed programme as far as possible. Strong justifications including the proposed quantity and the use of the equipment items to facilitate the programme delivery have to be provided for acquisition of equipment and other asset items. Should the application be approved, the successful applicant organisation should include an asset usage plan to account for the deployment of reusable equipment and assets upon programme completion. Reference could be made to "General Guidelines on Handling of Assets" on the webpage of Programme Management and Monitoring of OSALPs (https://www.edb.gov.hk/en/curriculum-development/curriculum-area/gifted/ge_fund/gef/pmm.html).

8. All procurements of goods and services (e.g. arrangement of a short study trip for students to visit a technology enterprise) should be carried out in an open, fair and competitive manner.

9. The "General Expenses" item in the budget plan is a catch-all category for costs that cannot be included in any of the other items (e.g. consumables, printing study notes, rental of venues, etc.). Details of the items should be provided with justifications and breakdown. To protect the environment, printing booklets to document/ showcase students' work should be avoided. For programmes to be organised by post-secondary institutions funded by the University Grants Committee, the institution may include administrative charges in the budget with detailed description and justifications. In general, subject to the standard rates laid down by different institutions, such charges should not be more than 20% of the total budget <u>exclusive of contingency</u>.

10. An applicant organisation is required to assess the risk of the proposed learning and teaching activities. For information about the safety precautions in science experiments and outdoor activities, applicant organisation may refer to the *Handbook on Safety in Science Laboratories* (https://cd1.edb.hkedcity.net/cd/science/laboratory/safety/SafetyHandbook2013_English.pdf) , *Safety Guidelines on Microbiology and Biotechnology Experiments in School Laboratories* (https://cd1.edb.hkedcity.net/cd/science/biology/resources/pdf/eng/11_SG_E_v4_with%20cover.pdf) and *Guidelines on Outdoor Activities* (https://www.edb.gov.hk/attachment/en/sch-admin/admin/about-activities/sch-activities-guidelines/Outdoor_EN.pdf) published by the EDB. The Government provides a Block Insurance Policy for aided (including aided schools before full conversion into schools under the Direct Subsidy Scheme) and Caput schools. Private schools such as international schools and schools under Direct Subsidy Scheme should procure insurance for students as advised by the EDB. To provide further protection to the students and other parties participating in the programmes or to meet the requirements of certain venue providers, applicant organisations may propose to purchase

public liability insurance and/or group personal accident insurance in their proposals. However, strong justifications must be provided in the budget plans to show the high risks of the learning and teaching activities, the mandatory requirements of the venue providers or other significant reasons for consideration by members of the Advisory Committee on Gifted Education who reserve to right to accept or decline the request of procurement of insurance.

11. Grantees of programmes with approved grant exceeding $100,000 are required to submit audited accounts upon programme completion and they could include the audit fees under the item of "General Expenses". The GE Fund will cover up to $5,000 of the audit fee for a programme with approved grant of $1 million or less, and up to $15,000 for a programme with approved grant exceeding $1 million.

12. To cover a rise in costs of equipment/ services/ general expenses and/or pay for other unexpected expenditures at emergency, a contingency provision of no more than 5% of the total budget exclusive of staff cost is considered acceptable.

13. A sample budget plan is provided below for reference:

Item	Particulars with justifications	Breakdown	Amount
Staff Cost	- **1** full-time programme coordinator to plan and lead the programme Qualification: A Master degree in **XX** field and 3 years of relevant teaching experience	- $**X** (monthly salary) x **X** months x 1.05 (for salary and MPF)	HK$ **X**
	- **X** part-time instructors to conduct the lessons and guide the students in research Qualification: A PhD degree in **XX** field and 3 years of relevant training/research experience	- $ **X** (hourly salary) x **X** hour/day x **X** days x **X** persons	HK$ **X**
	- **1** full-time programme assistant to assist implementation of the programme such as liaison with the students and the parents Qualification: A Bachelor degree or above in **XX**	- $ **X** (monthly salary) x **X** months x 1.05 (for salary and MPF)	HK$ **X**
	- **X** part-time student assistants / helpers to provide support to students during	- $ **X** (hourly salary) x **X** hour/day x **X**	HK$ **X**

Item	Particulars with justifications	Breakdown	Amount
	lessons, practicals and mentoring students Qualification: Undergraduate level in **XX**	days x **X** persons	
Equipment	- **X** set(s) of notebook computers bundled with software for use by students in lessons/ projects (hardware and software specifications: **XX**)	- $ **X** (unit price) x **X** sets	HK$ **X**
Services	- Procurement of services from a service provider to organise a one-day trip for students to **XX** to a local technological firm and exchange views with researchers	- $ **X** (unit cost) x **X** (estimated number of participants: **X** students and **X** helpers)	HK$ **X**
General Expenses	- Consumable materials (apparatus, consumable materials for practicals such as **XX**)		HK$ **X**
	- Rental of training venues including lecture rooms, workshops and laboratories in post-secondary institution/ organisation	- $ **X** (hourly rate) x **X** hours/day x **X** days	HK$ **X**
	- Printing **XX** sets of handouts (**XX** pages each) for use by the students	- $ **X** (unit cost) x **X** sets	HK$ **X**
	- Administrative charges to be paid to the organisation of the programme provider (only eligible for post-secondary institutions)	- **X**% of the total budget <u>exclusive of contingency</u> (actual percentage subject to the standard rate set by the post-secondary institution)	HK$ **X**
	- Audit fees (only applicable for budget exceeding HK$ 100,000)		HK$ **X**
Contingency		- (No more than 5%	HK$

Item	Particulars with justifications	Breakdown	Amount
		of the total budget exclusive of staff cost)	**X**
Others (please specify)			HK$ **X**
		Total Grant Sought	**HK$ X**

Note: This sample budget plan is only an example to illustrate the extent of details expected to be provided for the item description, justification as well as the calculation in the breakdown. Each programme has its uniqueness and objectives to achieve. The sub-items listed in the budget plan above should never be regarded as the hints to the manpower and other expenditures that an applicant organisation must include in the budget plan.

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Personal Information Collection Statement

<u>Purpose of Collection</u>

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 application for funding support under Gifted Education 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 application mentioned in (a) above;

  (c)   Activities relating to matching of the personal data within the database of 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/Subsidised 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 application.

<u>Classes of Transferees</u>

3.   The personal data you provide will be made available to persons working in EDB.   Apart from this, they may be transferred or disclosed to the parties or in the circumstances listed below:-

   (a)   other Government bureaux and departments, including Education Bureau, for the purposes mentioned in paragraph 1 above;

   (b)   the school to 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.

<u>Access to Personal Data</u>

4.   You have the right to request access to and correction of your personal data held by EDB. Request for access or correction of personal data should be made in writing to the Executive Officer (Gifted Education) at Room E328, 3/F, East Block, Education Bureau Kowloon Tong Education Services Centre, 19 Suffolk Road, Kowloon Tong, Kowloon or at exoge@edb.gov.hk.

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