

CODE OF AID
FOR
PRIMARY SCHOOLS

(SEPTEMBER 1994)

CODE OF AID FOR PRIMARY SCHOOLS

	<u>Contents</u>	<u>Sections</u>
Part I	Introduction	
	Interpretation	1
	Delegation of Power	2
	Management of Aided Schools	3
	Additional Managers	4
	Minimum Number of Managers	5
	Access to Accounts	6
Part II	Grant of Aid	
	Calculation of Grant	7
	Kinds of Grant	8-9
	Permanent Secretary's Authority	10-12
	Permanent Secretary to approve fees	13
	Subscriptions	14
	Method of payment of fees	15
	Expenditure of School Income	16
	Acceptance of Donations, Rentals	17-18
	Recurrent Grants	
	Salaries Grant	19
	Administration Grant/Revised Administration Grant	20
	Approved Staff Establishments	21
	Salaries, Increments, and Allowance	22-25
	Leave, Teaching Staff & Educational Psychologists	26-30
	Supply Teachers & Temporary Replacements	31-32
	Appointment of Clerical Staff	33
	Leave, Non-Teaching Staff & Educational Psychologists	34-35
	Operating Expenses Block Grant	36
	Composite Furniture and Equipment Grant	37
	Rent and Rates Grant	38
	Non-Recurrent & Capital Grants	39
	New Buildings	40-41
	Insurance	42
Part III	Administration of Aided Schools	
	Admission of Pupils	43
	Promotion of Pupils	44
	Suspension & Expulsion of Pupils	45
	Rate of Repetition	46
	Teaching Practice Arrangements	47
	Use of School Premises	48
	Appointment & Dismissal of Staff	49-50
	Conditions of Appointment	51-56
	Termination of Employment	57
	Retirement	58
	Promotion and Regrading	59-61
	Outside Duties	62
	Provident Fund	63-64
	School Accounts	65-74
Part IV	Appendices	
Part V	Index	

Purpose of the Code**I. INTRODUCTION****Interpretation**

1. (a) This Code of Aid prescribes the rules and conditions in accordance with which the Government of the Hong Kong Special Administrative Region promotes education by means of grants to such primary schools as may be approved for this purpose by the Permanent Secretary for Education.
- (b) In this Code of Aid, "Government" means the Government of the Hong Kong Special Administrative Region; "Permanent Secretary" means the Permanent Secretary for Education.

Permanent Secretary may delegate powers

2. (a) A Deputy Secretary for Education may exercise any function of the Permanent Secretary under this Code of Aid.
- (b) The Permanent Secretary may authorise any officer of the Education Bureau to exercise any function of the Permanent Secretary under any provision of this Code of Aid.

Management of aided schools

3. A school in receipt of aid under the terms of this Code of Aid shall be managed and conducted in accordance with the provisions of the Education Ordinance and of subsidiary legislation made under that Ordinance, and in compliance with the provisions of this Code of Aid and such instructions concerning aided schools as the Permanent Secretary may from time to time issue. An administrative guide for aided schools is in Appendix 1.

Permanent Secretary may appoint additional managers

4. If it appears to the Permanent Secretary -
 - (a) that a school is not being managed satisfactorily or that the education of the pupils is not being promoted in a proper manner; or
 - (b) that the composition of the School Management Committee is such that the school is not likely to be managed satisfactorily, or is such that the education of the pupils is not likely to be promoted in a proper manner; or
 - (c) that for any reason a school has no manager,

he may appoint one or more persons to be additional managers of the school for such period as he thinks fit.

Minimum number of managers

5. The School Management Committee in receipt of [aid under the terms of this Code of Aid shall consist of no less than five managers except in cases as approved by the Permanent Secretary.

Director of Audit and Commissioner Against Corruption to have right of access to records and accounts

6. As a condition of grant, the Director of Audit and Commissioner Against Corruption or any officer duly authorised by them may, if they consider it necessary in the public interest, have access to the records and accounts of a school in receipt of aid under the terms of this Code of Aid and to the records and accounts of any controlling or any other agencies to which money from the school is diverted which is directly or indirectly involved with the expenditure of public money, or special funds established for educational development out of income of such a school derived otherwise than from Government grants. In this connection, the staff of a school or of any controlling or any other agencies to which money from the school is diverted will be obliged to explain to the Director of Audit and Commissioner Against Corruption or to their authorised representatives, any matter relating to the receipt, expenditure or custody of money for which the school or any controlling or any other agencies to which money from the school is diverted or both are accountable in the public interest.

II. GRANT OF AID**Government aid and fees to be calculated so as to enable schools to provide education of an acceptable standard**

7. The kinds of grant necessary to cover the normal expenditure of a school shall be calculated in such a way that such grants together with the income from tuition fees, in those schools where fees are chargeable, should in general be sufficient to enable an aided school to provide education of a standard acceptable to the Permanent Secretary, subject to the provisions of this Code of Aid.

Grants of specified kinds

8. Aid to schools may consist of one or more of the following grants -
- (a) Recurrent Grants :
 - (i) Salaries Grant
 - (ii) Operating Expenses Block Grant
 - (iii) Composite Furniture and Equipment Grant
 - (iv) Rent and Rates Grant
 - (b) Non-recurrent and Capital Grants
 - (c) Non-recurrent Grants for curriculum development

Permanent Secretary to determine grants

9. (a) The Permanent Secretary shall, after making such inquiries as he considers necessary, determine to which schools grants are to be made, and shall determine the kind and amount of grant to be made to each such school.
- (b) The Permanent Secretary may withdraw a grant wholly or in part if he is satisfied that the school to which the grant was made is no longer in need of such grant or part of such grant.

Powers of the Permanent Secretary to reduce or withdraw grants

10. (a) The Permanent Secretary may, if it appears to him that the School Management Committee is not managing the school satisfactorily, or that the education of the pupils is not being promoted in a proper manner, or that the class structure is not being organised in such a manner as may be determined by the Permanent Secretary from time to time in accordance with Section 12(b) below, reduce or withdraw any grant made to such school. The Permanent Secretary shall cause a notice in writing to be served on the School Management Committee, setting out the grounds on which it appears to him that the school is not being managed satisfactorily, or that the education of the pupils is not being promoted in a proper manner, or that the class structure is not being organised in accordance with Section 12(b) below; and giving formal warning that consideration is being given to reduction or withdrawal of grants.
- (b) If, after a period of three months from the date of the notice specified in (a), the Permanent Secretary is satisfied that the School Management Committee is not managing the school satisfactorily, or that the education of the pupils is not being promoted in a proper manner, or that the class structure is not being organised in accordance with Section 12(b) below, he shall cause a notice in writing to be served on the School Management Committee, stating his intention to reduce or withdraw the grant at the termination of a period of three months from the date of such notice.
- (c) Notwithstanding (a) and (b) above, the Permanent Secretary may, in cases where he is satisfied that there has been serious financial irregularity, reduce or withdraw any grant as he deems fit. The Permanent Secretary may require the School Management Committee to refund to the Government all building, special expenditure or recurrent grants received, or an equitable proportion of such grants as assessed by the Government.

Grants to be refunded in certain circumstances

11. (a) If the School Management Committee wishes to cease to manage and conduct the school under the terms of this Code of Aid it shall give to the Permanent Secretary three months' notice in writing of such intention, and may be required on the termination of such three months' notice, to refund to the Government all Recurrent and Non-recurrent Grants or an equitable proportion of such grants as assessed by the Government.
- (b) The Permanent Secretary may, if for any reason a school ceases to be granted aid under the terms of this Code of Aid, require the School Management Committee to refund to the Government all Recurrent and Non-recurrent Grants received, or an equitable proportion of such grants as assessed by the Government.

Permanent Secretary to approve expansion

12. (a) No additional aid shall be granted in respect of the expansion of aided school, unless such expansion has received the approval of the Permanent Secretary in writing.
- (b) The class structure of the school shall be such as may be determined by the Permanent Secretary from time to time in the light of public interest and with due regard to the accommodation and facilities available in the school and after full consultation with the School Management Committee.

Permanent Secretary to approve fees

13. Unless otherwise permitted in writing by the Permanent Secretary, no fees shall be charged in a school in receipt of aid under the terms of this Code of Aid.

Subscriptions**Permanent Secretary may allow subscriptions to be charged**

14. (a) Where a school, administered under the terms of this Code of Aid, is permitted by the Permanent Secretary to charge Subscriptions to meet expenditure on school and educational needs (i.e. fee charging), the amount of Subscriptions in the school shall be subject to the approval of the Permanent Secretary.
- (b) A school may not transfer income arising from Subscriptions to any other body, or to a fund separately kept by the sponsoring body for educational development or any other purpose, unless such transfer has been approved by the Permanent Secretary and his approval notified in writing.
- (c) Schools are given the discretion to collect fines, charges and fees for specific purposes as may be determined by the Permanent Secretary from time to time. Any other collections will still require separate approval of the Permanent Secretary.

Method of payment of subscriptions

15. Unless otherwise permitted in writing by the Permanent Secretary, the amount of Subscriptions shall be collected in ten equal instalments payable on or after the first school day of each of the months of September to June inclusive, provided that Supervisors may, if they wish, require payment of the September instalment not earlier than 1 August.

Income to be used for provision of facilities in the school

16. Schools are given the discretion to use the Subscriptions (Tong Fai)/General Funds Account to meet educational and school needs. The School Management Committee should consider requiring the school to draw up a list of items to be charged to the Subscriptions (Tong Fai)/General Funds Account and providing procedural guides for the schools to use the funds.

Acceptance of donations

17. (a) The acceptance of donations by schools should be approved by the School Management Committee. Prior approval from the Permanent Secretary is required only when the donations may incur recurrent Government expenditure. All such income must be properly reflected in the subscriptions account. (*updated on 1 November 2013*)
- (b) The School Management Committee should note that before donations are accepted, it must be fully satisfied that there is no connection between the donation and any pupil's standing or possible future standing in the school and that offers of donations from commercial concerns cannot be interpreted in any way as inducements.

Other income to be taken into account

18. When a school lets any part or all of its premises for any purposes, the rental or profit so received shall be credited to the school accounts in such proportion as determined by the

Permanent Secretary.

Recurrent Grants

(I) Salaries Grant

Salaries Grant

19. (a) The approved Salaries Grant will be paid monthly and will consist of the approved salaries for all teaching staff and educational psychologists employed in accordance with the terms of this Code of Aid. For a school which has opted for the Revised Administration Grant, the Salaries Grant will also include the approved salaries of the clerical staff employed in accordance with the terms of this Code of Aid. To reconcile the grants already paid out with the actual approved expenditure, adjustment of over or under payment may be made from time to time, but the final adjustment for the accounting year, or the financial year as the case may be, will be made after the submission of audited annual accounts. *(updated on 1 November 2012)*
- (b) The School Management Committee shall be responsible for the arrangement of rectifying any overpayment or underpayment of salaries with the staff concerned. *(updated on 1 November 2012)*
- (c) The payment of Salaries Grant in respect of staff provided for a particular purpose will be dependent on the effective carrying-out of that purpose.

Administration Grant/Revised Administration Grant

20. (a) For the employment of clerical and janitor staff, schools are given an option to choose between the Administration Grant and the Revised Administration Grant to meet their specific needs.
- (i) For a school that has elected to receive the Administration Grant, the salaries for the clerical and janitor staff employed will be paid out of the Administration Grant. The School Management Committee shall be responsible for the appointment, dismissal, salaries and terms of service of these non-teaching staff.
- (ii) For a school that has elected to receive the Revised Administration Grant, the salaries of the janitor staff will be paid through the Revised Administration Grant, while the approved salaries of the clerical staff will be paid through the Salaries Grant as provided under Section 19(a). The School Management Committee shall be responsible for the appointment, dismissal, salaries and terms of service of the janitor staff.
- (iii) The School Management Committee shall notify the Permanent Secretary promptly of the change of clerical or janitor staff and specify the effective date.

Both the Administration Grant and the Revised Administration Grant can also be used for procuring ancillary services (e.g. the cleaning of the school premises) by contract. Schools which have opted for the Revised Administration Grant may opt for the Administration Grant if they so prefer. The option once exercised in favour of the Administration Grant is final and irrevocable.

- (b) The Administration Grant and the Revised Administration Grant, being constituent grants of the Operating Expenses Block Grant introduced with effect from the 2000/01 school year, shall have their rates adjusted annually thereafter with reference to the mid-point salary of an entitled clerical post and the maximum point salary of the janitor post at the September 1999 level. The annual adjustment shall be in accordance with the movement of the Composite Consumer Price Index.
- (c) The clerical and janitor staff entitlements of a school determined according to the respective scales shown at Appendix 2B shall be used for the purpose of calculating the amount of the Administration Grant, or Revised Administration Grant where appropriate. A school that opts for the Revised Administration Grant will be required to follow the conditions of appointment for clerical staff shown at Appendix 5 Attachment L.

Approved staff establishment

21. Approved establishments for teachers and other staff are shown in Appendix 2. (*updated on 1 November 2012*)

Approved salary scales and allowances

22. Expenditure on account of salaries and allowance will be allowed for grant purposes at the rates laid down in Appendix 3 or as otherwise approved by the Permanent Secretary.

Date of commencement and cessation of salaries

23. Salaries of all staff shall normally commence from the date of assumption of full duties, and shall normally cease immediately after the last day of performance of full duties, except as provided for in Appendix 9.

Increments may be granted or withheld

24. (a) Increments in salary for staff will normally be given by the School Management Committee when they fall due. Increments for part-time teachers will be based on the due proportion of the full-time scale, and will be given on an annual basis when they fall due.
- (b) When it appears to the School Management Committee that the service of a member of the staff has been unsatisfactory, the School Management Committee may, subject to approval by the Permanent Secretary, withhold an annual increment. In such case, the School Management Committee shall notify the Permanent Secretary in writing of its intention to withhold the increment and its reasons for so doing and shall notify the member of staff in writing of its intention to withhold the increment. Such notification to the Permanent Secretary and to the member of staff shall normally be given three months before the incremental date.

Permanent Secretary may specify recognised experience for incremental credit on appointment

25. (a) On appointment to an aided school, a teacher shall receive incremental credit for full-time or part-time previous teaching experience on the basis of one increment for each year of full-time service or the equivalent in aggregated part-time service in -
- (i) a government school,
 - (ii) an aided school,

- (iii) an assisted private school on or after 1 January 1966, or
- (iv) a private school offering formal curriculum on or after 1 September 1971.

Service in assisted private schools prior to 1 January 1966 and in private schools offering formal curriculum prior to 1 September 1971 shall be credited on the basis of one increment for two years full-time service or the equivalent in an aggregated part-time service. Only post-qualification experience which is supported by documentary evidence and acceptable to the Permanent Secretary shall be counted for the purpose of increments. Service in schools outside Hong Kong shall be assessed for the purpose of increments at the discretion of the Permanent Secretary.

- (b) Incremental credit for experience on appointment in the case of educational psychologists of a school may be awarded in accordance with the above principles, where applicable. *(updated on 1 November 2012)*

Sick/maternity/special tuberculosis leave/paternity leave and paid leave as jurors or when required to appear in court as witnesses

26. The School Management Committee may grant to teachers and educational psychologists -
- (a) the following types of leave in accordance with the conditions specified at Appendices 10 and 11 -
 - (i) sick leave (paid and no-pay);
 - (ii) maternity leave (paid and no-pay);
 - (iii) special tuberculosis leave (paid and no-pay); and
 - (iv) paternity leave
- and
- (b) paid leave to those selected to serve as jurors and those required to appear in court as witnesses.

(updated on 1 September 2016)

Permanent Secretary may approve paid study leave to teachers and educational psychologists

27. (a) A teacher in an aided school who is selected by the Permanent Secretary for a course of training may continue to receive full salary for the approved period of study leave.
- (b) A teacher in an aided school attending such other course as the Permanent Secretary may have approved, may receive, for the approved period of study leave full salary or such proportion of full salary as the Permanent Secretary may determine. No application for paid study leave will be considered unless the prior approval of the Permanent Secretary has been obtained for the teacher to attend the course.
 - (c) Educational psychologists will be granted the same study leave benefits as those for teaching staff. *(updated on 1 November 2012)*

Leave that requires prior approval of Permanent Secretary

28. (a) Prior approval of the Permanent Secretary is required in respect of the following types of leave to teachers and educational psychologists -
- (i) no-pay leave other than no-pay sick/maternity/special tuberculosis leave;

- (ii) study leave other than that provided under Section 27, or which has not been endorsed by the Permanent Secretary in advance; and
- (iii) any other kinds of leave not specified in this Code.

(updated on 1 November 2012)

- (b) The Permanent Secretary may approve the grant of no-pay leave under (a) (i) above to a staff recommended for such leave by the School Management Committee. Such no-pay leave shall not be counted for the purposes of increments. *(updated on 1 November 2012)*
- (c) When the last day of such no-pay leave is followed by a Sunday or a gazetted public holiday, such Sunday or gazetted public holiday will be regarded as an extension of the period of no-pay leave.
- (d) When the last day of such no-pay leave is followed by the major school holidays, i.e., Christmas, Chinese New Year, Easter and Summer Vacation, payment of salary will resume on the day the staff reports to school for duty, provided that it is neither a Sunday nor a gazetted public holiday. *(updated on 1 November 2012)*
- (e) When the last day of such no-pay leave is followed by a school holiday, other than the major school holidays, payment of salary will resume on the day following the last day of such no-pay leave provided that it is neither a Sunday nor a gazetted public holiday.
- (f) Where, however, no-pay leave has been granted as no-pay maternity, sick, or special tuberculosis leave, payment of salary will resume on the day following the last day of such no-pay leave, notwithstanding that the day following the last day of such no-pay leave may be a Sunday or a gazetted public holiday.

Special leave

29. (a) Normally special leave with pay will not be granted to teachers on account of personal affairs during the term. However, in exceptional cases, the Supervisor may grant special leave with pay for a maximum of 2 days per academic year to teachers on grounds of urgent private affairs of grave importance.
- (b) The School Management Committee may also grant paid leave of not more than 14 days to any teacher for each academic year to represent HKSAR in national/international conferences or events such as the Asian Games and the Olympic Games; or being invited to present paper or speak at national/international conferences in connection with education or participating in training and camping exercises of Civil Aid Service, Auxiliary Medical Service or Auxiliary Police Force. Sufficient grounds and justifications should be produced to support the grant of paid leave. *(updated on 12 January 2006)*

Permanent Secretary may approve the grant of paid leave to Heads

30. The Permanent Secretary may approve the grant of paid study leave or leave for other specially approved purposes to the Head of an aided primary school.

Employment of supply teachers

31. (a) The School Head may, on behalf of the School Management Committee, employ supply teachers on a daily basis to substitute for teachers who are absent on approved leave for three consecutive calendar days or more and claim reimbursement of salaries. Application for reimbursement of the salaries of supply teachers shall be made in a prescribed form.
- (b) Such a supply teacher shall be of the same grade as, or of a lower grade than, the teacher for whom he is substituting; except that a Certificated Master/Mistress may be engaged to replace an unqualified teacher. A supply teacher is paid on fixed daily rates as the Permanent Secretary may determine.
- (c) For the purpose of this section, teaching staff shall include Student Guidance Teachers.
- (d) Service as supply teaching or non-teaching staff on a daily basis shall not be counted for the purpose of increments or regarded as service for any other purposes.

Employment of temporary replacements

32. (a) The School Management Committee may approve the employment of temporary replacements on monthly terms of the appropriate grade for teaching staff who have been granted maternity leave, paid sick leave, paid study leave or no-pay leave for a period not less than 90 days.
- (b) A temporary replacement on monthly terms may also be approved to fill a vacancy on the teaching staff establishment in circumstances where it appears to the Permanent Secretary that the appointment of a supply teacher under the terms of Section 31 of this Code of Aid would be inappropriate.
- (c) The School Management Committee may approve the employment of temporary replacement for educational psychologists who have been granted the following leave for a period not less than 30 days: paid sick leave, paid leave for other purposes, paid maternity leave, paid study leave or no-pay leave.

Appointment of clerical staff

33. Schools whose clerical staff are paid out of the approved Salaries Grant may appoint clerical staff on the scale shown in Appendix 2B and in accordance with the conditions of appointment contained in the Appendix 5 Attachment L.

Leave for educational psychologists and clerical staff paid out of the Salaries Grant

34. (a) The School Management Committee may grant paid leave on an annual basis to those educational psychologists and clerical staff paid out of the Salaries Grant as provided at Appendix 12A and 12B respectively. Such leave shall be taken during the long holidays, subject to mutual agreement between the school and the staff. No replacement will be granted for the staff on such leave. (*updated on 1 November 2012*)
- (b) Subject to the provisions of the Employment Ordinance, the School Management Committee shall grant paid sick leave to those clerical staff paid out of the Salaries Grant at the rate of two paid sickness days for each completed month of employment during the first twelve months of employment and 4 paid sickness days for each

month of service thereafter. Sick leave may be accumulated up to a maximum of 120 days. Clerical staffs on approved paid sick leave are entitled to receive full salary.

- (c) Subject to the provisions of the Employment Ordinance, the School Management Committee shall grant maternity leave as provided at Appendix 13 to those female clerical staff paid out of the Salaries Grant.
- (d) In case a school that has opted for the Revised Administration Grant has only one clerk, the School Management Committee may approve the employment of a temporary replacement when the clerk is on approved sick leave or maternity leave for not less than 14 days. Such temporary clerk is paid on a fixed daily rate as announced in the relevant circular in force. A replacement staff substituting for a period not less than 90 days will be paid on a monthly basis. *(updated on 1 September 2010)*
- (e) The School Management Committee may grant paternity leave up to 5 working days with full-pay to those educational psychologists and clerical staff paid out of Salaries Grant with not less than 40 weeks' continuous service immediately before taking the paternity leave. Schools are required to follow the administration arrangements of paternity leave as set out in the prevailing circular available on the Education Bureau homepage. *(updated on 1 September 2016)*

Endorsement of records of leave granted and inspection of leave records

- 35. (a) Records of leave that the School Management Committee may grant to teachers shall be submitted in August each year to the Permanent Secretary, who will signify his approval to the leave by endorsing the relevant leave records, provided that he is satisfied that the School Management Committee has considered each leave application with supporting documents in accordance with the conditions provided in this Code, the Employment Ordinance and the instruction he may from time to time issue. *(updated on 12 January 2006)*
- (b) Records of leave granted to other staff should be endorsed by the Supervisor on annual basis. *(updated on 1 November 2012)*
- (c) Schools should keep the leave records of their staff up-to-date. These records shall be available for inspection by officers authorised by the Permanent Secretary as and when required.

(II) Operating Expenses Block Grant

Recurrent block grant to cover operating expenses

- 36. Schools will be provided with the Operating Expenses Block Grant to meet their operating expenses. The Grant consists of various non-salary recurrent grants except those items of expenditure which are disbursed on an actual claim or reimbursement basis. It comprises a General Domain under which schools are free to set flexibly the allocations for each constituent grant and a Special Domain for funds schools can only use for the specified purposes. Surplus of the General Domain can be used to top up expenditure on Special Domain items and items chargeable to other government subsidies outside the Grant. The rates of the Grant will be adjusted annually in accordance with the movement of the Composite Consumer Price Index. Schools are allowed to retain unspent funds up to 12 months' provision of the Grant. Given the funding flexibility provided under the Grant,

schools are required to put in place formal procedures for financial planning, monitoring and evaluation of results. Details of the Grant are set out at Appendix 15.

(III) Composite Furniture and Equipment Grant

Recurrent block grant to cover furniture and equipment items

37. (a) The Composite Furniture and Equipment Grant is a recurrent block grant for purchasing furniture and equipment items to meet the needs of schools and students. The Grant also covers maintenance/repairs fees for furniture and equipment items and insurance premium for non-standard furniture and equipment items for school portions. It will be disbursed to schools in a single payment annually on a per-class-per-annum basis, and will be adjusted annually in accordance with the movement of the Composite Consumer Price Index. For a new school, the Grant may be paid in full three years after the commencement of its operation and when the Education Bureau has approved the closure of its Set-up Fund (New Grant) Account.
- (b) A school can retain surplus up to five times of the provision of the prevailing level of the Grant. Details of the Grant are set out at Appendix 16.

Permanent Secretary may approve reimbursement of rent and rates

38. The Permanent Secretary may approve reimbursement of rent, government rent and rates actually paid for school purposes except for government rent and rates for the area of the school tuckshop.

Non-Recurrent and Capital Grants

Permanent Secretary may approve non-recurrent and capital grants

39. (a) The Permanent Secretary may approve grants in respect of items such as major repairs and furniture and equipment requirements not covered by the Composite Furniture and Equipment Grant. The grant shall be based on the approved tendered cost or actual cost, whichever is the less. However, a fee-charging aided primary school shall be eligible for capital subsidy not exceeding 50% of the approved cost, unless the Permanent Secretary shall otherwise determine.

Permanent Secretary may approve initial grant for school-based psychological service

- (b) The Permanent Secretary may approve, for the purpose of providing school-based educational psychology service, an initial one-off set up grant per educational psychologist post for the purchase of i) furniture; ii) test material; iii) reference books; iv) educational programmes and packages; and v) information technology equipment, at the rate as announced in the relevant circular. A separate ledger would be necessary to record the details of expenses charged to this grant. This grant should be completely utilized within 12 months in which the first educational psychologist is appointed to the given post. Any surplus will then be clawed back. The initial grant shall be given once only to each educational psychologist post, regardless of the base school. *(updated on 1 November 2012)*

Permanent Secretary may approve capital grant in respect of a new school

40. The Permanent Secretary may approve capital grant for buildings, furniture and equipment in respect of a new school, or of extension to or reprovisioning of an existing school, administered under the terms of this Code of Aid.

41. Procedures in respect of Sections 39 and 40 of this Code of Aid are shown in Appendices 17, 18 and 19.

Insurance

42. (a) The Government shall carry the risk of damage or loss to the school premises of aided schools including furniture and equipment caused by fire, natural disasters such as typhoons, earthquakes, flooding, etc. and other perils such as an aircraft crash, explosion, impact by any road vehicle, sprinkler leakage or bursting or overflowing of water tanks, apparatus and pipes, riots or malicious acts of any person, and damage caused by construction or excavation work by a third party adjacent to the school or in its vicinity; loss of standard items by theft and burglary; and loss of cash (government funds only) in transit. Details concerning the procedures for assessment and settlement of claims for damage, destruction or loss of standard items in the cases mentioned above, and related security measures are set out in Appendix 20. However, schools should themselves decide whether to take out insurance for non-school portions and buildings and above-standard or non-standard items of furniture and equipment purchased out of their own funds, and the premiums shall be met from schools' own funds. For above-standard or non-standard items of furniture and equipment for school portions acquired out of the Composite Furniture and Equipment Grant, the premiums for the insurance can be charged to the Grant.
- (b) The Government shall take out the insurance for public liabilities and employees' compensation as required by the Employees' Compensation Ordinance on behalf of all aided schools under a Block Insurance Policy. However, staff members whose salaries are not subvented by the Education Bureau are not covered by the employees' compensation insurance of the Block Insurance Policy. Schools should arrange their own insurance to cover this type of staff, if any.
- (c) In addition to (b) above, the Block Insurance Policy includes a section on group personal accident insurance for students, which provides a nominal benefit to students who suffer from Accidental Death or Permanent Disablement whilst participating in any school activities.
- (d) Schools may, on behalf of parents, arrange a separate additional cover for group personal accidents of students with any insurance company, if necessary. However, parents should be given full discretion to accept the arrangement, if any. In addition, the group personal accident insurance under the Block Insurance Policy should not be seen as a comprehensive personal insurance coverage for students. If parents wish to have a comprehensive personal insurance coverage for their children, they may acquire it separately at their own costs from any insurance company.

III. ADMINISTRATION OF AIDED SCHOOLS

Admission, Suspension and Expulsion of Pupils

Permanent Secretary to regulate admission of pupils

43. Admission and allocation of places to primary schools shall be regulated as the Permanent Secretary may determine, and as shown in Appendix 1.

Promotion of pupils

44. Except with the approval of the Permanent Secretary, no pupil shall be allowed to take more than seven years to complete the six-year course. Provisions relating to promotion and repetition are shown in Appendix 1.

Permanent Secretary to regulate suspension and expulsion of pupils

45. Suspension and expulsion of pupils from an aided school shall be regulated as the Permanent Secretary may determine, and as shown in Appendix 1.

Permanent Secretary to prescribe the rate of repetition

46. The Permanent Secretary may after consultation with the schools councils from time to time prescribe a maximum rate of repetition either generally or at particular education levels.

Schools to accept teaching practice arrangements

47. Schools should co-operate, whenever possible, in the training of teachers by accepting for teaching practice student teachers undergoing training from the Hong Kong Institute of Education and the local universities. Consultation with the institutions concerned should be arranged prior to the placement of student teachers.

Use of School Premises**Use of school premises**

48. (a) The premises of an aided school shall be used only for the approved activities of such school, except as may be permitted in writing by the Permanent Secretary.
- (b) Classrooms and ancillary facilities should be made available at the request of the Permanent Secretary for the operation of evening courses run by the non-profit-making school operators commissioned by the Education Bureau. In making his requests, the Permanent Secretary will take into consideration any special difficulties and existing commitments and will fully consult the school authorities concerned. In this connection, schools concerned may charge appropriate remuneration in respect of hire charges and electricity charges.

Appointment and Dismissal of Staff**Permanent Secretary to be notified of appointment and dismissal of staff**

49. (a) Appointment and dismissal of staff shall be in accordance with regulations 76, 77 and 78 of the Education Regulations, in conformity with this Code of Aid and in accordance with such instructions as the Permanent Secretary may from time to time issue.
- (b) All appointments, resignations and dismissal shall be promptly notified to the Permanent Secretary. Such notification shall be in writing, stating the effective dates and indicating, where applicable, the period of notice given. Schools should issue to staff leaving the employment a document certifying the particulars of his/her employment including, wherever applicable, the monthly salary, salary point, incremental date and leave balance.

- (c) For the purpose of processing applications from teachers for withdrawal of provident fund, the School Management Committee shall also inform the Permanent Secretary when a teacher –
- (i) is compulsorily retired, or dismissed or the contract is terminated (on completion or otherwise); or
 - (ii) retires voluntarily, resigns, or terminates the contract (on completion or otherwise), in order to avoid compulsory retirement, dismissal, or contract termination, on account of professional misconduct or being convicted of an offence.

Appointment of staff

50. (a) The School Management Committee may approve the appointment of staff paid out of the Salaries Grant in accordance with the provisions of this Code of Aid and any requirements the Permanent Secretary may determine, except for the following staff whose appointment shall be subject to the approval of the Permanent Secretary -
- (i) school head;
 - (ii) direct appointment of staff (excluding educational psychologists) to promotion ranks;
 - (iii) registered teachers by merit of ten-year recognised teaching experience;
 - (iv) unqualified teachers;
 - (v) staff above the age of sixty; and
 - (vi) temporary Native-speaking English Teachers.
- (b) The School Head shall check the eligibility of a person for appointment in accordance with the requirements of this Code of Aid and the relevant circulars issued by the Permanent Secretary. Schools shall be responsible for assessing the salaries of staff. The School Head shall verify the salary assessment and inform the Permanent Secretary of the salary particulars of staff paid out of the Salaries Grant in the prescribed form for grant purposes.

(updated on 1 November 2012)

Teachers and other staff to be medically examined

51. (a) All teachers (other than supply teachers) and educational psychologists shall, before appointment, undergo a medical examination including a chest X-ray examination by a registered medical practitioner. *(updated on 1 November 2012)*
- (b) Serving registered teachers on transfer from one aided school to another without break of service will not be required to attend an X-ray examination or present a medical certificate on appointment.
- (c) The School Management Committee may exempt the following employees from pre-employment X-ray examination -
- (i) Staff members who can show that they have undergone a chest X-ray examination not more than twelve months before their dates of appointment. The X-ray should not show signs of active tuberculosis.

- (ii) Staff members in possession of a certificate from a registered medical practitioner, confirming that they are pregnant. Exemption granted to staff in this category will continue until the end of their subsequent maternity leave, at which time they should be instructed to make their own arrangements for X-ray examination.
- (d) The purpose of the above examinations is not to discriminate against any employee or job applicant with a disability. Employers are advised to note the relevant provisions in the Code of Practice on Employment issued by the Equal Opportunities Commission.

Head of school to verify qualifications, experience and date of birth

52. (a) The Head of an aided school shall inquire into, examine and verify the certificates and testimonials of an applicant for appointment as a teacher or an educational psychologist, and shall verify any previous experience claimed by such applicant, making reference for this purpose to the Head of the school at which such applicant may last have been employed. *(updated on 1 November 2012)*
- (b) The Head of an aided school shall verify the date of birth of any person employed as a staff in such school, and shall require such person to produce for inspection the Hong Kong Identity Card, a birth certificate, statutory declaration or such other documents as may appear necessary for this purpose. *(updated on 1 November 2012)*
- (c) Schools shall keep all copies of certificates and testimonials, appointment forms and any other relevant documents in respect of all staff employed for inspection as and when required.

Qualifications of teachers and educational psychologists

53. Qualifications required for eligibility for employment in an aided school as a teacher or an educational psychologist are shown in Appendix 5. *(updated on 1 November 2012)*

Temporary employment of unqualified persons as Teachers

54. Subject to the approval of the Permanent Secretary, the School Management Committee may, if a qualified person is not available to fill a vacancy in the teaching staff establishment, temporarily employ an unqualified person as a teacher. The salary for such an unqualified teacher shall be as stated in Appendix 3.

Contract of service; letter of appointment

55. (a) A teacher shall, on appointment to an aided school, be furnished with a contract of service and, in addition, or alternatively, a letter of appointment. Such contract of service or letter of appointment shall be signed by the Supervisor of the school and shall be countersigned by the teacher on appointment.
- (b) Such contract of service or letter of appointment shall not be subject to annual renewal, but a school may make it clear in the contract that, subject to the agreement between the teacher concerned and the School Management Committee, the contract may be renewed at regular intervals.

- (c) Such contract of service or letter of appointment shall specify -
- (i) The name of the school and of the employer, this being the School Management Committee or, if any school has only one manager, that manager;
 - (ii) the date from which the appointment is to have effect;
 - (iii) requirements, if any, relating to probation;
 - (iv) the conditions of service and, if applicable, any specific language proficiency requirements;
 - (v) the salary to be paid on commencement of the appointment, and any salary scale relating to the post, including the annual incremental date;
 - (vi) whether such teacher is to contribute to a provident fund; and if so, what such contribution shall be;
 - (vii) the entitlement of such teacher to paid sick leave, maternity leave or paternity leave; *(updated on 1 September 2016)*
 - (viii) conditions of termination of appointment and the minimum period of notice of termination of the contract to be given by either party wishing to terminate such contract as specified under Section 57;
 - (ix) the conditions relating to payment of salary on the resignation or dismissal of such teacher as specified under Section 57;
 - (x) that such teacher shall act in accordance with the terms of the Education Ordinance and of subsidiary legislation made under that Ordinance, of this Code of Aid and of such instructions as the Permanent Secretary may from time to time issue regarding the conduct of aided schools.

Appointment to be initially on probation

56. A teacher on first appointment to an aided school shall serve a probationary period of two years, after which the employment of such teacher shall be permanent, subject to such provisions regarding termination of employment as may be contained in such teacher's contract of service or letter of appointment.

Termination of employment

57. (a) The employment of a teacher who is serving a period of probation shall be terminable by the giving of one month's notice either by the School Management Committee at which such teacher is employed, or by the teacher.
- (b) The employment of an unqualified teacher under the terms of Section 54 of this Code of Aid shall be terminable by the giving of one month's notice either by the School Management Committee or by the teacher, subject to such provisions regarding termination of employment as may be contained in such teacher's contract of service or letter of appointment.
- (c) The employment of a teacher who has satisfactorily completed a probationary period

shall be terminable by the giving of three months' notice in writing by the School Management Committee or by the teacher.

- (d) A teacher employed for a period of not less than two years as specified in a contract of service or letter of appointment shall, at least three months before the expiry of such specified period, inform the School Management Committee whether or not he wishes to seek a renewal of the contract of service. The School Management Committee school shall similarly, at least three months before the expiry of such specified period, inform the teacher whether or not it intends to propose renewal of the contract of service relating to his employment.
- (e) A teacher who terminates his employment without having given such notice of intention so to terminate as may be required by the terms of this Code of Aid or of the contract of service or letter of appointment relating to his employment, shall be liable to pay one month's salary in lieu of notice, to be credited to the school's Salaries Grant Account. Nevertheless, the School Management Committee may waive the said payment if the teacher's explanation is justified and inform the Permanent Secretary of such a waiver and the reasons thereof.
- (f) The School Management Committee may subject to the provisions of the Employment Ordinance, suspend a teacher from his normal duties for a period of not exceeding 14 days under the following circumstances -
 - (i) in cases where criminal proceedings of a serious nature have been, or are likely to be instituted;
 - (ii) in cases where the teachers' serious misconduct is under investigation and it would be against the interest of the school for him to continue to teach in the classroom.

In case of (i), where the criminal proceedings are not concluded within 14 days, the period of suspension on half pay may be extended till the end of such proceedings. The School Management Committee may decide whether or not to suspend the teacher on half pay and such payment of salaries shall be subject to the approval of the Permanent Secretary.

- (g) The School Management Committee shall only dismiss a teacher for good and sufficient reasons (see Appendices 7 and 8). A teacher shall be liable to summary dismissal if it appears to the School Management Committee that he has been convicted of a criminal offence or has committed a grave breach of duty.

Retirement

Retirement

58. (a) The Head, teachers and educational psychologists shall retire at the end of the school year in which he reaches the age of sixty. *(updated on 1 November 2012)*
- (b) Under exceptional circumstances, the Permanent Secretary may, on the recommendation of the School Management Committee and subject to the submission of a satisfactory medical certificate as to fitness, permit the School Head, any teacher and educational psychologist to continue in service for a period of one

school year after the end of that in which he reaches the age of sixty, and for further periods each of one school year, up to the end of the school year in which he reaches the age of sixty five. *(updated on 1 November 2012)*

- (c) All clerical staff of a school employed from the Salaries Grant in accordance with the approved establishment and pay scales for these staff shall normally retire at the age of 60 except in special cases with the approval of the Permanent Secretary.

Promotion and Regrading

Promotion and regrading

59. (a) Except for promotion to the post of the Head and direct entry to a promotion post which shall be subject to the approval of the Permanent Secretary, the School Management Committee may approve promotion of all staff members and regrading of non-graduate teachers to take up a post of the graduate grade in accordance with the provisions in this Code.
- (b) The School Management Committee is required to put in place fair and open procedures in processing all cases of promotion and regrading in compliance with any such instructions as the Permanent Secretary may from time to time issue. The Supervisor shall inform the Education Bureau in a prescribed form of all cases of promotion and regrading.
60. The conditions under which teaching staff and educational psychologists may become eligible for promotion to a higher rank of appointment are set out in the appointment requirements for respective ranks at Appendices 5 and 6. A teacher in service who becomes eligible for appointment to a higher grade by reason of the acquisition of further qualifications will be considered for appointment to the higher grade. However, a school may not exceed the overall entitlement in respect of grades and ranks of appointment as shown at Appendix 2. *(updated on 1 November 2012)*

Acting Appointments

61. The School Management Committee may approve full-time regular teachers for acting appointments to approved functional posts when such posts are left vacant arising from approved leave or wastage for a continuous period of not less than 30 consecutive calendar days. The approved functional posts in aided primary schools cover posts in the ranks of Head Master/Mistress I, Head Master/Mistress II, Senior Primary School Master/Mistress, Primary School Master/Mistress (including Student Guidance Teacher), Principal Assistant Master/Mistress, Senior Assistant Master/Mistress and Assistant Master/Mistress (including Student Guidance Teacher). Arrangements for acting appointments and allowances are set out in Appendix 3. Such acting allowance will be treated as salary for provident fund purposes.

Outside Duties

Outside Duties

62. Staff employed full-time in a school administered under the terms of this Code of Aid shall not engage in outside duties except with the prior approval of the Supervisor, who must be satisfied that such duties contribute to the public good and are not such as to interfere with

the efficient performance of the staff's normal duties. Records of such approval should be kept by the school. (*updated on 1 November 2012*)

Provident Fund

Provident Fund

63. (a) A teacher who contributes to the Subsidised Schools Provident Fund is subject to the provisions of the Subsidised Schools Provident Fund Rules made under the Education Ordinance. The benefits which a teacher-contributor may receive from the funds are briefly reproduced from the Rules in Appendix 14.
- (b) A teacher who does not contribute to the Subsidised Schools Provident Fund, and who contributes to another provident or superannuation fund approved by the Permanent Secretary may on submission of original receipts in respect of his contributions to such funds, receive from the Government a donation in respect of 50% of his contribution to such funds or 5% of his basic salary in Hong Kong, whichever is the less.
- (c) Temporary teachers appointed for 60 days or more and new teachers over the age of 55 on first appointment are required to join the Mandatory Provident Fund scheme.
64. Unless specifically exempted under the Mandatory Provident Fund Scheme Ordinance or employed for less than 60 days, all non-teaching staff are required to contribute to a registered Mandatory Provident Fund Scheme or a scheme registered under the Occupational Retirement Scheme Ordinance.

School Accounts

Supervisors to keep accounts

65. (a) The Supervisor of an aided school shall be responsible for keeping proper books of account, which shall comprise -
- (i) cash book for government grants and cash book for school funds;
 - (ii) petty cash book for Government funds and school funds;
 - (iii) attendance register and register of fees/subscriptions/other charges showing inter alia receipt number and amount of Tong Fai and other charges, if any, against the name of each pupil;
 - (iv) revenue receipt counterfoil and Daily Collection Summary in respect of Tong Fai and any other income;
 - (v) payment vouchers in respect of all expenditure;
 - (vi) a register of capital assets;
 - (vii) a register of non-recurrent grants - building, and a register of non-recurrent grants furniture and equipment;

- (viii) a general ledger and subsidiary ledgers showing accounts in respect of all items of recurrent income and expenditure;
 - (ix) provident fund records for individual staff;
 - (x) register of hire of school accommodation;
 - (xi) register of donations; and
 - (xii) stock and sales records for exercise books, stationery, etc., if necessary.
- (b) All books of accounts, receipts, counterfoils and vouchers shall at all reasonable times be available for inspection by the Permanent Secretary or officer authorised by him in that behalf. Records of a permanent nature, e.g., annual accounts, inventories, records of capital expenditure and Government non-recurrent subsidies, records in connection with school building funds/donations, etc., shall not be destroyed without the prior approval of the Permanent Secretary. However, the following records may be destroyed after a certain period of retention, as specified below -
- (i) Minimum period of retention - 7 years :
Books of accounts, i.e., cash books, Ledgers, etc.
All types of vouchers, bank statements.
 - (ii) Minimum period of retention - 2 years :
Quarterly returns (duplicates), Pay-sheets (duplicates),
Fees receipts/school attendance registers,
Register of hire of school accommodation.

Accounts not to include provision for depreciation

66. An aided school shall not make any provision in its accounts for depreciation. Expenditure in respect of a capital asset shall be debited to the relevant capital asset account and shall not be debited to an income and expenditure account.

Supervisor to be responsible for bank account

67. (a) The Supervisor of an aided school shall keep bank accounts in the name of the school, one of which accounts shall be kept solely in respect of moneys received from the Government.
- (b) All disbursements shall, as far as possible, be made by cheque, which shall be signed by the Supervisor and, where there are two or more registered managers, by one other registered manager in addition to the Supervisor.
- (c) The Supervisor may keep a reasonable cash balance as specified by the Permanent Secretary from time to time to meet small payments. Alternatively, a further account could be opened for this purpose with cheques signed by the Head and the Deputy Head of the school, duly authorised by the School Management Committee.

School funds to be kept separate

68. Subscriptions or other sums received by a school from the Government or other sources shall not, in any circumstances, be paid into a bank account kept in the name of the Supervisor or other person or persons, whether or not such person or persons are members

of the School Management Committee or teaching staff, but shall be paid into the bank account maintained in the name of the school.

Submission of accounts

69. (a) The Permanent Secretary may require the Supervisor of an aided school to submit accounts at such times and in such manner as he may determine.
- (b) The accounts of an aided school shall, unless the Permanent Secretary in writing otherwise permits, be audited by certified public accountants/public accountants registered under the Professional Accountants Ordinance; and the audit fee shall be charged against the school's School and Class Grant account.
- (c) The accounting year covered by the audited accounts shall be from the first day of September of one year to the thirty-first day of August of the next. Schools which are unable to prepare their annual accounts on this basis may apply in writing to the Permanent Secretary for following the traditional financial year basis.
- (d) For the purposes of this Code of Aid, the financial year shall be from the first day of April of one year to the thirty-first day of March of the next.

Permanent Secretary may withhold grant if accounts not submitted

70. The Permanent Secretary may, if a school fails to submit annual accounts or delays the submission of such accounts without reasonable cause, temporarily withhold payment of such proportion of grant made monthly to the school as he shall determine.

Subscriptions (Tong Fai) used for development to be separately accounted for

71. (a) If the Permanent Secretary has permitted an aided school under the terms of paragraph (b) of Section 14 of this Code of Aid, to transfer Tong Fai to a fund separately kept by the sponsoring body for educational development or other purpose, an audited annual statement of accounts in respect of such fund shall be prepared. The accounting year, to which such accounts shall refer, shall be from the first day of September of one year to the thirty-first day of August of the next, except for financial year basis as approved by the Permanent Secretary.
- (b) The Supervisor of such school, when submitting annual accounts of the school as required by the terms of Section 69 of this Code of Aid, shall attach thereto the audited accounts in respect of such fund; and these accounts shall refer to the same period of time as those of the school, to which they are attached.

Accounts relating to private section of a school to be kept separately

72. (a) Where the School Management Committee operates a private section or boarding section which does not receive financial assistance under this Code of Aid, the accounts of such private section or boarding section shall be kept separately from those of the aided section and audited; and shall specify any subvention received from departments of the Government other than the Education Bureau. The accounting year, to which such accounts shall refer, shall be from the first day of September of one year to the thirty-first day of August of the next, except for financial year basis as approved by the Permanent Secretary.

- (b) The Supervisor of an aided school shall, when submitting accounts, also submit accounts relating to any private section or boarding section of such school; and these accounts shall refer to the same period of time as those of the aided school.

Recurrent grants to be refunded and accounts submitted, if school ceases to be aided

73. The School Management Committee shall, in the event of that school's ceasing to be an aided school under the terms of this Code of Aid, forthwith repay to Government any unexpended portion of recurrent grants made to the school, and submit a full set of duly audited accounts for the period up to and including the last day of operation of that school as an aided school.

Outgoing Supervisor to hand over accounts

74. (a) If at any time for any cause the Supervisor of an aided school ceases to act as such, he shall hand over all accounts and records relating to the school, together with any cash belonging to the school which may be in his charge, to such other person as the Permanent Secretary may approve as Supervisor, or, pending the Permanent Secretary's approval of such other person as Supervisor, to the School Management Committee.
- (b) The Supervisor of an aided school, on ceasing to act as such, shall prepare a certificate listing all accounts and records relating to the school and any cash belonging to the school which may have been in his charge. This certificate shall be signed by the outgoing Supervisor and by either such other person as the Permanent Secretary may approve as Supervisor, or pending the Permanent Secretary's approval of such other person as Supervisor, by a majority of the members of the School Management Committee. A copy of this certificate together with a certificate prepared by the bank at which the school's accounts are kept, and showing the state of such accounts on the date at which the outgoing Supervisor ceased to act as Supervisor, shall be submitted by the School Management Committee to the Permanent Secretary.
- (c) The Permanent Secretary may require the School Management Committee to submit, in such form and within such period of time as he shall prescribe, full accounts in respect of the period up to and including the day on which the outgoing Supervisor ceased to act as Supervisor.
- (d) In the event of the Permanent Secretary having required such accounts to be submitted, and the School Management Committee having failed to submit them, the Permanent Secretary may require the outgoing Supervisor and the members of the School Management Committee, or such of them as he shall determine, severally or jointly to refund to the Government such proportion of grants made to the school during the period in which the outgoing supervisor acted as Supervisor as he shall assess.

Appendices to Code of Aid for Primary Schools

Appendix 1	Administrative Guide
Appendix 2A	Teaching Staff and Educational Psychologist Establishment
2B	Clerical and Janitor Staff Entitlement
2	Attachment A1 Teaching Staff Establishment in Aided Primary Schools Operating Bi-sessional Classes
	Attachment A2 Teaching Staff Establishment in Whole-day Aided Primary Schools
Appendix 3	Salary Scales and Allowances
Appendix 4	Special Education Programmes in Aided Primary Schools
	Attachment A Special Education Allowance
Appendix 5	Qualifications Required for Grades of Appointment in Aided Primary Schools
	Attachment A Headmaster/Headmistress I
	Attachment B Headmaster/Headmistress II
	Attachment C Senior Primary School Master/Mistress
	Attachment D1 Primary School Master/Mistress
	Attachment D2 Primary School Master/Mistress (Student Guidance Teacher)
	Attachment E Assistant Primary School Master/Mistress
	Attachment F Principal Assistant Master/Mistress
	Attachment G Senior Assistant Master/Mistress
	Attachment H1 Assistant Master/Mistress
	Attachment H2 Assistant Master/Mistress (Student Guidance Teacher)
	Attachment I Certificated Master/Mistress
	Attachment J Educational Psychologist I
	Attachment K Educational Psychologist II
	Attachment L Clerical Staff

Appendix 6	Conditions for Promotion and Acting Appointment in Aided Primary Schools
Appendix 7	Teaching Staff's Contract in Aided Schools
Appendix 8	Procedure to be followed in case of Dismissal or Termination of Appointment of a Teacher
Appendix 9	Payment of Salaries on Appointment, Resignation, Retirement or Termination of Appointment
Appendix 10	Grant of Sick Leave and Special Tuberculosis Leave
Appendix 11	Grant of Maternity Leave
Appendix 12A	Paid Annual Leave Entitled by Educational Psychologists Paid out of Salaries Grant
Appendix 12B	Paid Annual Leave Entitled by Clerical Staff Paid out of Salaries Grant
Appendix 13	Grant of Maternity Leave to Female Clerical Staff Paid out of Salaries Grant
Appendix 14	Subsidised Schools Provident Fund
Appendix 15	Operating Expenses Block Grant
Appendix 16	Composite Furniture and Equipment Grant
Appendix 17	Non-recurrent Grants (Furniture and Equipment)
Appendix 18	Non-recurrent Grants (Major Repairs)
Appendix 19	Notes on Building Grant
Appendix 20	School Assets and Settlement of Claims

Administrative Guide**First Aid**

1. In every school, there shall be a first-aid box, the contents of which shall be periodically checked, and replaced when necessary. The first-aid box should contain treatment materials including antiseptics, disposable plastic/vinyl gloves, forceps, sterilised dressings and bandages. In schools where there are science laboratories and workshops, first-aid boxes shall contain materials for giving immediate treatment to burns, scalds, acid/alkali burns, shocks and other injuries. All reasonable precautions should be taken to guard against accidents. Dangerous poisons should be kept in a locked cupboard.
2. At least two members of the staff of every school shall be trained in giving first-aid treatment.

Fire Precautions

3. All schools, as required by the Director of Fire Services, shall be equipped with fire extinguishers kept in easily accessible places and janitor staff shall be trained in the use of the extinguishers. The School Head shall ensure that all fire service installation or equipment in the school premises is kept in good condition at all times. Laboratories shall in addition be supplied with buckets of sand and water. If there is no laboratory in the school, experiments involving the use of candles and spirit lamps should only be demonstrated by teachers in classrooms provided with fire extinguishers, fire blankets and first-aid boxes. The candles or spirit lamps so used should be placed in a metal tray away from any combustibles.
4. Fire drills, when all pupils must leave the school building and the roll be called, shall be held at least once every six months, or otherwise as advised by the Director of Fire Services and shall be noted in the school log book or in the appropriate school record book.
5. The responsibility for sounding a fire alarm in a school should not be delegated to one individual. It should be the duty of any person discovering or suspecting an outbreak of fire to give the alarm.
6. Where a school has more than one fire alarm bell, arrangements should be made to ensure that when an alarm is sounded on one, it is immediately relayed to all other alarm bells.
7. Fire alarms and drills shall always include clerical, kitchen and maintenance staff, as well as teachers and pupils.
8. No cooking is allowed on the school premises, except in specifically designed and constructed kitchens approved by the Director of Fire Services.

Correspondence with the Education Bureau

9. All correspondence should be addressed to the Permanent Secretary but may be sub-directed to the particular officer primarily concerned.
10. Members of the staff of an aided school should normally correspond with the Permanent Secretary through the Head/Supervisor of the school.

Admission of Pupils

11. (a) Allocation of places in Primary 1 of aided schools shall be made according to such arrangements as the Permanent Secretary may from time to time determine.
- (b) Notwithstanding the provision in paragraph 11(a) above, the Permanent Secretary may direct an aided school to admit a child to fill an available vacant place.
- (c) Places becoming available from time to time, other than those filled by the arrangements as specified in paragraphs 11(a) and 11(b) above, may be filled at the discretion of the Head of the school.
- (d) All schools shall maintain a system of records giving details of each pupil in a form approved by the Permanent Secretary. Such record cards shall give particulars of pupils entering and leaving the school.

Suspension and Expulsion of Pupils

12. (a) Pupils admitted into an aided primary school shall be allowed to complete the six-year course. No primary pupil should be expelled without proper warning and notice to parents and without the approval of the Permanent Secretary.
 - (b) Pupils must not be expelled solely on the ground that they are academically weak.
 - (c) In appropriate cases, pupils with persistent lack of academic progress or behaviour problems may be referred to the Education Bureau for assessment and advice.
13. (a) No pupil should be considered for expulsion except on grounds of:
 - (i) non-payment of gazetted fees; or
 - (ii) a grave breach of school discipline if after reasonable measures to enlist the co-operation of parents have proved unsuccessful.
 - (b) Where approved school fees and/or Subscriptions are charged, the non-payment of such fees is an accepted ground for expulsion. Supervisors and Heads of schools will be expected to investigate the circumstances and, if they are convinced that the non-payment is genuinely deliberate, to inform the Permanent Secretary accordingly before expelling the pupil.
 - (c) Exceptionally, if it is considered that there are other grounds of sufficient gravity to merit expulsion, the Permanent Secretary shall be consulted at an early stage before any formal action is taken.
 - (d) If a Head is contemplating the expulsion of a pupil, every effort must be made to interview the parents. A warning letter shall be sent to the parents or guardians and a full report shall be submitted to the Permanent Secretary for his consideration at the same time.
14. (a) Suspension from school is not an appropriate way to treat a misbehaved pupil. Under most circumstances, the pupil in question should be allowed to continue normal schooling, pending the outcome of any investigation into the cause of his misbehaviour by the school and, if necessary, he should be referred for professional advice.

- (b) The suspension of a pupil for a short period of time may be ordered on grounds of unsatisfactory conduct after the parents or guardians have been duly warned and notified. The Permanent Secretary shall be informed of all cases of suspension from school for more than three school days.
- (c) All schools shall keep a record of all suspensions and expulsions showing the reasons in each case and the approval of the Permanent Secretary, if applicable.

Promotion of Pupils

15. (a) Pupils should normally be promoted at the end of the academic year and retention in a particular class in order to allow a pupil to repeat a whole year's work should be the exception rather than the rule. It is especially important that repetition should not be associated with failure to obtain a fixed mark in any test or examination and it should not be made automatic in such cases.
- (b) Exceptions to the general rule of promotion from one class to another may however be allowed at the discretion of Heads of schools where it is clear that it is in the best interests of a pupil that he should be allowed to repeat an academic year for educational reasons.
16. All Primary 6 pupils shall be presented for the allocation of secondary school places through the Secondary School Places Allocation System except as otherwise the Permanent Secretary may approve.

Attendance, Terms and Holidays

17. An attendance register shall be kept for each class and shall be made up within one hour of the commencement of each school session.
18. The Head of an aided school shall keep a daily summary showing the attendance of each class.
19. The school hours shall be as approved by the Permanent Secretary. If the time devoted to religious knowledge and other religious observances exceeds 1 1/2 hours per week, such excess time shall be additional to the normal school hours.
20. No pupil shall be compelled to attend religious instruction or to participate in any religious observances and separate provision shall be made for all pupils not wishing to attend such activities. All pupils shall be informed of this requirement at the commencement of each school year.
21. The number of school holidays, which should include public holidays, shall be 90 days a year, with three additional discretionary holidays. The 90 days school holidays should primarily be holidays for the pupils. Teachers may also enjoy these holidays but they may be required to carry out extra-curricular duties or assist in performing school administrative duties during these holidays at the school's discretion.
22. The Supervisor shall, in accordance with regulation 79 of the Education Regulations, send to the Permanent Secretary before the 15th August in each year notice of all holidays it is intended to give in the coming school year, including any special holidays given in honour of any particular event, and of all dates on which the usual work of the school will be suspended.

23. The Permanent Secretary may, in accordance with regulation 82 of the Education Regulations, by notice in writing to the Supervisor of any school require that holiday shall be given on any day specified in such notice and the Supervisor shall ensure that such holiday is given accordingly.
24. Schools may set aside not more than three days per school year for teachers to take part in school-based staff development and school planning work, during which pupils do not need to attend school.

Curriculum and Time-Table

25. The Head of an aided school shall forward to the Permanent Secretary a notification of any changes in the course of study for the coming school year, not later than 1st September each year. The Permanent Secretary may withhold his approval of the whole course or any portion thereof, and the Head shall thereupon modify it accordingly.
26. In every school, there shall be a time-table showing :
 - (a) the time at which each daily session begins and ends; and
 - (b) the time of the instruction given for each subject of the curriculum.

Copies of the class and teachers' time-tables and time allocation table shall be forwarded to the Permanent Secretary on the date specified in relevant curriculum circulars issued each year.

27. In selecting textbooks for use by pupils, schools should observe the guidelines on the selection of textbooks and learning materials contained in the relevant circular issued by the Education Bureau. Textbooks should not be changed unnecessarily as this may impose an undue financial burden upon parents. Changes should be made only if textbooks currently in use are found to be unsuitable. Where a series of graded books is to be replaced, the new series should be introduced gradually, beginning at the lowest level and not at all levels throughout the school at one time except in the event of the implementation of a new syllabus. Any proposal to replace a book on the Recommended List by a book which is not on the Recommended List must be supported by good educational reasons. The school should be prepared to supply such reasons if required to do so.
28. Each school should have a homework policy for which the Head of the school carries responsibility in order to exercise proper control over the homework being set. Such a policy should be worked out in consultation with teaching staff and, wherever possible, explained carefully to parents. The guiding principle in setting homework is that it should be planned and chosen to complement and reinforce the work being done in the classroom and that due recognition should be given at all times to the age and abilities of pupils.

Closing of Schools in the Event of Storms and Heavy Persistent Rain

29. (a) Schools shall be closed in the event of the hoisting of any typhoon signal higher than No. 3 or in the event of the issue of the 'RED' warning of the AMBER-RED-BLACK colour coded rainstorm warning system or as otherwise instructed by the Permanent Secretary.

- (b) In exceptional circumstances, the Permanent Secretary may announce the closing of schools or the suspension of classes in one or more districts. Pupils living in such districts need not go to school even if their schools are located elsewhere.
- (c) If local weather, road, slope or transport conditions warrant the closing of a particular school, and announcement has not been made by the Permanent Secretary to close schools generally, the Head of the school may close the school and notify the respective Senior School Development Officer as soon as possible afterwards.
- (d) Heads of schools are advised to draw up a contingency plan to deal with the closing of schools or suspension of classes due to deteriorating weather and parents should be informed of the arrangements through a circular letter, which should also remind parents of the use of their discretion in deciding whether or not to send their children back to school in the event of heavy persistent rain or deteriorating weather, having regard in particular to local weather, road, slope or transport conditions.
- (e) Heads of schools are advised to take appropriate measures to ensure the safety of pupils in school.

Inventories and Stock-books

30. Schools need to keep registers for fixed assets and books. Heads of schools shall keep Inventories of all permanent furniture and equipment giving date of acquisition and date and reason of any writing off. Separate Inventories shall be kept for Furniture, Gymnastic Equipment, etc.

Communication between School Management Committee and Teaching Staff

31. The Supervisor of an aided school shall be responsible for making arrangements satisfactory to the Permanent Secretary for consultation between the School Management Committee and the teaching staff.

Sale of School Textbooks, Exercise Books, School Uniforms and Miscellaneous Items including 'Tuck Shop' items

32. No trading operation of any kind is allowed in the school except with the prior approval in writing of the Permanent Secretary. Any profits so derived should be reflected in the school's account.
33. The Head of an aided school shall be responsible for ensuring that the provisions in the guidelines on conducting trading operation which the Permanent Secretary may from time to time issue are fully complied with.
34. Comprehensive price lists of all commodities for sale to pupils must be displayed prominently in the school.

Teaching Staff and Educational Psychologist Establishment of Aided Primary Schools**A. Teaching Staff Establishment**

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

(updated on 1 September 2016)

- (2) Notwithstanding (d)(1) above, a school has the flexibility to determine an alternative grade structure, and the following should apply –

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

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

(updated on 1 September 2016)

B. Ranking of Teaching Staff

(a) Head of School

- (i) In schools with 1-11 classes, the rank of Head will be Senior Primary School Master/Mistress (SPSM). *(updated on 1 September 2008)*
- (ii) In schools with 12-23 classes, the rank of Head will be Headmaster/Headmistress II (HMII).
- (iii) In schools with 24 classes or more, the rank of Head will be Headmaster/Headmistress I (HMI).

(b) Senior Teachers

The provision of Senior Teachers is included in the manning scale in Attachment A1 for primary schools operating bi-sessional classes at the ratio of one senior teacher for every four classes and Attachment A2 for whole-day primary schools at the ratio of one senior teacher for every three classes. The rank of a Senior Teacher will be Senior Primary School Master/Mistress (SPSM), Primary School Master/Mistress (PSM) or Assistant Master/Mistress (AM) as appropriate. Senior Teachers will be required to undertake specific duties in addition to class teaching. The School Management Committee or Head of a school may exercise discretion in the allocation of duties to Senior Teachers as well as the re-distribution of their duties in the light of the school's entitlement of Senior Teachers. In a primary school with 12 – 23 classes, one PSM post will be re-ranked to the SPSM rank for the deputy head, and in a primary school with 24 classes or more, two PSM posts will be re-ranked to the SPSM rank for deputy heads. Teachers in the PSM or AM rank may be appointed by promotion or direct appointment to take up the deputy head posts. *(updated on 1 September 2008)*

(c) Class Teachers

The rank of Class Teachers will be Assistant Primary School Master/Mistress (APSM) or Certificated Master/Mistress (CM) as appropriate. The provision of Class Teachers is included in the manning scale in Attachment A1 for primary schools operating bi-sessional classes and Attachment A2 for primary schools operating whole-day classes.

C. Additional Teachers

(a) Student Guidance Teacher

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

- (i) for a sponsoring body entitling to one SGT only for the schools under it, the SGT post is included in the teaching staff entitlement of the base school for working out the graduate post entitlement of that school and the SGT will be considered together with other teachers in the school for regrading; and
- (ii) for a sponsoring body entitling to two or more SGTs, the following options are given –
 - The SGT post be included in the teaching staff entitlement of each individual base school for working out the graduate post entitlement of the school and the SGT be considered together with other teachers in the school concerned for regrading; or

- A graduate post entitlement equivalent to 55% of the SGT posts entitled be provided to the sponsoring body in the 2015/16 school year (60% in the 2016/17 school year and 65% from the 2017/18 school year onwards), and the appointment of SGTs in the PSM grade be considered separately under the same sponsoring body.

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

(updated on 1 September 2016)

(b) Teacher-librarian

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

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

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

(c) Additional Senior Teacher Post of English

An additional Senior Teacher post, to be offset by a post in the rank of CM or APSM as appropriate, is provided to each school that operates six or more classes to provide curriculum leadership in the teaching of English to improve co-ordination, planning and methodology. In an aided bi-sessional primary school with a total of 25 classes or more for both sessions, each session is considered as a separate school. The conditions for appointment to the additional post are at Appendix 6.

(d) Additional Posts for Specialised Teaching

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

(e) Primary School Curriculum Leader

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

D. Educational Psychologists

- (a) The Education Bureau creates additional educational psychologist (EP) posts in aided ordinary schools and invites school sponsoring bodies (SSBs) to apply for these posts under the School-based Educational Psychology Service (SBEPS) starting from the 2008/09 school year. Each EP post awarded to the SSB is employed as a non-teaching specialist staff of a base school under its sponsorship to provide SBEPS for schools assigned by the Education Bureau and such schools are not limited to those belonging to the same SSB operating the base school.
- (b) The EP posts created in aided ordinary schools are combined establishment, with the ranks of EP I and II. Candidates having fully met the entry requirements for EP I, with at least 3 years of satisfactory service as an EP II, can be considered for direct appointment to EP I. Candidates not fully meeting the above criteria may be appointed as EP II, should they meet the entry requirements for this rank. Guides to appointment of EP I and II and conditions for promotion of EP are stipulated in Attachment J and K of Appendix 5 respectively, and conditions for promotion of EP are stipulated in Appendix 6.

(updated on 1 November 2013)

Clerical and Janitor Staff Entitlement

The following scales shall apply in determining the clerical and janitor staff entitlements of a school for the purpose of calculating the amount of Administration Grant or the Revised Administration Grant^{Note} as appropriate payable to it -

(I) Clerical staff**(a) Bi-sessional schools**

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

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

(b) Whole-day Schools

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

(II) Janitor staff

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

^{Note} A school that opts for the Revised Administration Grant will pay the salaries of its janitor staff through the Revised Administration Grant, amount of which is calculated with reference to the scale at (II) above. It will be provided with clerical staff according to the scale at (I) above and pay the actual salaries of its clerical staff through the Salaries Grant.

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

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

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

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

(updated on 1 September 2008)

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

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

@ In ordinary primary schools with 12 - 23 classes, one PSM post will be re-ranked to the SPSM rank for deputy heads, and in ordinary primary schools with 24 classes or more, two PSM posts will be re-ranked to the SPSM rank for deputy heads.

- # The respective numbers of Senior Teachers (excluding the Deputy Head) and Class Teachers by rank by PSM, AM, APSM and CM entitled by a school shall be determined in accordance with the grade structure it has adopted or as endorsed by the Education Bureau as appropriate, subject to the total number of graduate teacher posts entitled by the school not being exceeded.

(updated on 1 September 2008)

Salary Scales and Allowances

(This appendix should be read in conjunction with Appendix 5)

(A) **Salary Scales**

(I) The salary scales of teaching staff in each grade and rank are as follows:

<u>Grade/Rank</u>	<u>Salary Scale</u> (Points on the Master Pay Scale)
1. Headmaster/Headmistress (HM I)	38-41
2. Headmaster/Headmistress II (HM II) <i>(updated on 1 September 2008)</i>	35-39
3. Senior Primary School Master/Mistress (SPSM) <i>(updated on 1 September 2008)</i>	34-35
4. Primary School Master/Mistress (PSM)	30-33
5. Assistant Primary School Master/Mistress (APSM)	17-29 if appointed before 1.4.2000 12-29 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 17-29 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive) 15-29 if appointed on or after 1.10.2010

Untrained APSM will not be allowed to proceed beyond the salary bar as shown below-

<u>Date of appointment</u>	<u>Salary Bar</u>
Before 1.4.2000	27
Between 1.4.2000 and 30.9.2010 (both dates inclusive)	22
On or after 1.10.2010	20

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

6. Principal Assistant Master/Mistress (PAM)#	34-39 (* Bar at 36)
7. Senior Assistant Master/Mistress (SAM)#	30-33C (* Bar at 33) (* Passage requires acquisition a Bachelor of Arts Degree in Primary Education, or equivalent.)
8. Assistant Master/Mistress (AM)	25-29

9. Certificated Master/Mistress (CM) 14-24 if appointed before 1.4.2000
12-24 if appointed between 1.4.2000 and 31.7.2007
14-24 if appointed on or after 1.8.2007

Untrained CM will not be allowed to proceed beyond the salary bar as shown below-

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

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

10. Unqualified Teacher (UQT) 4

No non-degree holders should be appointed as new school heads. Serving heads at AM, SAM and PAM rank who are non-degree holders will be accommodated until natural wastage.
(updated on 1 September 2010)

(II) The salary scales of educational psychologists are as follows:

- Educational Psychologist I (EPI) 34 - 44
- Educational Psychologist II (EPII) 25 - 33 if appointed before 1.4.2000
20 - 33 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive)
25 - 33 if appointed between 1.8.2007 and 30.9.2010 (both dates inclusive)
23 - 33 if appointed on or after 1.10.2010

(updated on 1 November 2012)

(B) Supply Teachers

<u>Appointment</u>	<u>Salary per working day</u>
Qualified Teacher	Refer to Revised Daily Rates of Pay for Supply Teachers as announced in Education Bureau Circular currently in force.
Unqualified Teacher	

(C) Responsibility Allowance

- (a) An Assistant Master/Mistress# serving as Head of a primary school with less than 12 classes will be awarded a responsibility allowance (RA) at a rate equivalent to one increment on the Master Pay Scale above the level of his substantive salary while serving in this capacity.
- (b) An Assistant Master/Mistress Deputy Head of a primary school with 12 or more classes in addition to undertaking special duties as a Senior Teacher will be awarded a RA at a rate equivalent to three-quarters of one increment on the Master Pay Scale above the level of his substantive salary while serving in this capacity. The RA should cease immediately upon the promotion/appointment of a teacher to the new SPSM rank for deputy heads. In any case, the RA for deputy heads will cease with effect from the 2010/2011 school year.

(updated on 1 September 2008)

(D) Acting Allowance

A full-time SAM/AM/CM or HMII/SPSM/PSM/APSM who has been recommended and approved to take up the functional duties of PAM/SAM/AM or HMI/HMII/SPSM/PSM as appropriate on an acting basis for a qualifying period of not less than 30 calendar days will be entitled to draw an acting allowance for the period concerned as follows-

- (a) In the case of acting-up with replacement (this involves acting in a functional post which carries a higher maximum salary point than that of the teacher's substantive rank) - 90% of the difference between the teacher's substantive salary and the minimum salary of the higher rank in which he is acting; or at a rate equivalent to 90% of the increment next on the rank-scale of the acting post above the level of the teacher's substantive salary if it is the same or more than the minimum salary of the acting post. The rate will be revised to 100% of the difference after the first 180 calendar days of acting. (Note 10) *(updated on 1 November 2012)*
- (b) In the case of doubling-up without replacement provided (this involves acting in a headship post which carries a higher maximum salary point than that of the teacher's substantive rank in addition to undertaking his own duties) - 23% of the minimum salary of the higher rank or 100% of the difference in pay between the teacher's substantive salary and the minimum salary of the higher rank in which he/she is acting, whichever is the more. (Note 10) *(updated on 1 November 2012)*

Note :

1. The minimum 30-calendar-day qualifying period for acting appointment shall include intervening Sundays and public holidays, and Sundays and public holidays immediately preceding and following the acting period. However, Sundays and public holidays immediately preceding and following the acting period will not be included in calculating the acting allowance.
2. School holidays can be counted as qualifying period and attract acting allowances provided that the teachers concerned are required to perform duties of the acting posts during the holidays. Such qualifying period should be recognised and properly recorded by school.
3. The qualifying period may include up to a maximum of 3 consecutive days' leave or absence in total (excluding sick leave and absence for authorised training and duty) taken

during the acting period. Leave and absence in excess of 3 consecutive days will not be counted as part of the qualifying period.

4. Leave exceeding 3 consecutive working days involves the forfeiture of acting allowance for the whole period of the acting staff's leave (i.e. leave and intervening public holidays and Sundays). *(updated on 1 November 2012)*
5. When a teacher acts in different ranks consecutively, each acting appointment should be counted individually and separately and cannot be aggregated for the purpose of meeting the minimum qualifying period for acting allowances.
6. A teacher can only draw one acting allowance at any one time, and schools should not make concurrent multiple acting appointments.
7. Acting appointments can be made on operational grounds even if no acting allowance is payable.
8. Leave exceeding 30 days or leave necessitating the grant of another teacher to act as the head or deputy head for the whole or part of his leave involves the forfeiture of the responsibility allowance for the whole period of leave.
9. All allowances will be treated as salary for Provident Fund purposes.
10. The rate of acting allowance takes effect on 1 September 2004.

(updated on 1 September 2008)

Special Education Programmes in Aided Primary Schools

With the exception of the following Sections, special education programmes in ordinary aided primary schools shall be operated and conducted in accordance with the Code of Aid for Primary schools.

Size of Programme

1. (a) The number of pupils in a special education programme (currently known as Intensive Remedial Teaching Programme) for children with learning difficulties is 8 - 15, except with the written permission of the Permanent Secretary;
- (b) The Permanent Secretary may from time to time approve the ratio of pupils per programme in respect of such category of pupils in need of special educational provision, as may seem to him necessary.

Ratio of Teachers per programme

2. The approved ratio of teachers to programme in an ordinary primary school shall be 1 teacher per programme. These teachers will form part of the staff establishment of the school.

Special Education Allowance

3. Details of the special education allowance for teachers are shown in Attachment A. The Permanent Secretary may from time to time review the Job-related Allowance when necessary.

Class Grant

4. (a) A Class Grant shall be made in respect of the Intensive Remedial Teaching Programme and shall be paid monthly in advance.
- (b) Items of expenditure which may be charged to the Class Grant account are identical to those class-based items chargeable to the School and Class Grant.

(updated on 1 September 2009)

Special Education Allowance**1. Prior to 1 September 2003**

A special education allowance (SEA) may be awarded to teachers of special education programmes who have successfully completed a recognised course of training in special education run by the Hong Kong Institute of Education, or a course recognised by the Permanent Secretary as an equivalent. The allowance will be at a rate equivalent to two increments next on the Master Pay Scale above the level of their substantive pay.

2. On or after 1 September 2003

The SEA will cease to be payable to new recruits and existing teachers who have not yet commenced their recognised special education training in the 2002/03 school year. As for the existing teachers of special education programmes, who are in receipt of the SEA or pursuing their studies in recognised special education courses, the following arrangements will apply:

- (a) Teachers of special education programmes who are in receipt of the SEA will retain an SEA of one salary point above their substantive salary, provided that the sum of their substantive salary and the SEA should not exceed their maximum pay point on their respective pay scale regardless of their existing pay point, except in the circumstances specified in sub-paragraph (b) below.
- (b) Teachers of special education programmes who have already reached the maximum pay point in the 2002/03 school year will be allowed to retain an SEA of one salary point above the maximum pay point.
- (c) Teachers of special education programmes who are pursuing their studies in recognised special education courses in the 2002/03 school year are, in principle, allowed to be paid an SEA of one salary point above their substantive salary with effect from September of the following school year on successful completion of the recognised special education courses, provided that they remain as teachers of special education programmes. However, the sum of their substantive salaries and the SEA should not exceed their maximum pay point on their respective pay scales.
- (d) Teachers of special education programmes who are in receipt of other responsibility allowance are not allowed to retain the SEA.
- (e) The above arrangements will also be applicable to the existing teachers of special education on transfer to another aided school performing the duties as a teacher in a special education programme without a break of service, provided that the teaching posts they fill
 - (i) have been created in the 2002/03 school year, or
 - (ii) are created after the 2002/03 school year due to expansion of classes or with explicit permission of the Education Bureau for the post-holders to retain their SEA.

Teaching staff of special education programmes refers to teachers of intensive remedial teaching programmes, integrated education programmes and aided special schools.

(updated on 1 September 2008)

**Qualifications Required for Grades of Appointment
in Aided Primary Schools**

1. The guides to appointment in respect of the grades/ranks Headmaster/Mistress I, Headmaster/Mistress II, Senior Primary School Master/Mistress, Primary School Master/Mistress, Assistant Primary School Master/Mistress, Principal Assistant Master/Mistress, Senior Assistant Master/Mistress, Assistant Master/Mistress, Certificated Master/Mistress, Educational Psychologist I, and Educational Psychologist II are shown in Attachments A to K. *(updated on 1 November 2012)*
2. With effect from 2004/05 school year, aspiring principals are required to attain the Certification for Principalship in addition to complying with the appointment conditions in force at the time before they could be considered for appointment to principalship.
3. The guide to appointment in respect of clerical staff is shown at Attachment L.

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Headmaster/Headmistress I**

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

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| 1. Appointment requirements | <p>(a) <u>Normally - Promotion/Regrading</u></p> <p>(i) Promotion - promotion rank for Headmaster/Headmistress II.</p> <p>(ii) Regrading - A Principal Assistant Master/Mistress# serving in the nominating primary school with a local first degree is eligible for consideration for regrading as Headmaster/Headmistress I.</p> <p>(b) <u>Exceptionally - Direct Entry</u></p> <p>(i) Candidates should have fulfilled all requirements for normal promotion to this rank. The School Management Committee must submit justifications for the exceptional nature of the proposed appointment for which the Permanent Secretary will have discretion either to approve or reject having regard to the special circumstances.</p> <p>(ii) Starting from the 2000/01 school year, new school heads should be limited to candidates holding a local first degree plus teacher training in primary education, or equivalent qualifications.</p> |
| 2. Type of work | Head of a primary school with 24 classes or more. |
| 3. Pay scale | MPS Point 38-41 |
| 4. Period of probation | 2 years for direct entrants. |
| 5. Promotion prospects | Nil |
| 6. Any other remarks | (a) The salary scale and incremental date of a Headmaster/Headmistress I regraded from the rank of Principal Assistant Master/Mistress will be determined as follows: |

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

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

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Headmaster/Headmistress II**

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

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| 1. Appointment requirements | <p>(a) <u>Normally - Promotion/Regrading</u></p> <p>(i) Promotion - promotion rank for Senior Primary School Master/Mistress or Primary School Master/Mistress.
<i>(updated on 1 September 2008)</i></p> <p>(ii) Regrading – A Senior Assistant Master/Mistress# serving in the nominating primary school with a local first degree or equivalent is eligible for consideration for regrading as Headmaster/Headmistress II.</p> <p>(b) <u>Exceptionally - Direct Entry</u></p> <p>(i) Candidates should have fulfilled all requirements for normal promotion to this rank. The School Management Committee must submit justifications for the exceptional nature of the proposed appointment for which the Permanent Secretary will have discretion either to approve or reject having regard to the special circumstances.</p> <p>(ii) Starting from the 2000/01 school year, new school heads should be limited to candidates holding a local first degree plus teacher training in primary education, or equivalent qualifications.</p> |
| 2. Type of work | Head of a primary school with 12 to 23 classes. |
| 3. Pay scale | MPS Point 35-39 |
| 4. Period of probation | 2 years for direct entrants. |
| 5. Promotion prospects | Headmaster/Headmistress I.
A Headmaster/Headmistress II will be eligible for consideration for promotion to Headmaster/Headmistress I after he/she has served successfully as follows in a primary school for at least 3 years: |

Either

- (i) as a Headmaster/Headmistress II;

Or

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

(updated on 1 September 2016)

6. Any other remarks

- (a) In the case of promotion to Headmaster/Headmistress I, as the salary scale of a Headmaster/Headmistress II overlaps that of a Headmaster/Headmistress I (MPS Pt 38-41), the promotees' salary scale and incremental date will be determined as follows:

- (i) If their pay before promotion is less than the minimum of the pay scale of the new higher office by more than one point, they will enter at the minimum and their new incremental date will be determined by the date of their promotion;
- (ii) If their pay before promotion is less than the minimum of the pay scale of the new higher office by not more than one point, they will enter at the minimum and retain their existing incremental date;
- (iii) If their pay before promotion is not less than the minimum of the pay scale of the new higher office and subject to the maximum point of the new scale not being exceeded, they will enter the new scale at the point which is next above their pay and retain their existing incremental date; and
- (iv) If the promotees are already receiving the maximum pay of their former office at the date of promotion, they will enter the new scale at the point next above their pay and their new incremental date will be determined by the date of promotion.

(updated on 1 September 2011)

- (b) The salary scale and incremental date of Headmaster/Headmistress II regraded from the rank of Senior Assistant Master/Mistress will be determined as follows:

- (i) If immediately before regrading, his/her pay is less than the minimum of the pay scale of the new office, he/she will receive the minimum. The

new incremental date will be determined by the date of regrading;

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

#The SAM rank will be phased out through natural wastage.
(updated on 1 September 2008)

GUIDE TO APPOINTMENT

Aided Primary Schools

Senior Primary School Master/Mistress

I. Head and Deputy Head

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

- 1. Appointment requirements**
 - (a) Normally - Promotion

Promotion rank for

 - (i) Primary School Master/Mistress, and
 - (ii) Assistant Master/Mistress with a local first degree or equivalent.
 - (b) Exceptionally - Direct Entry
 - (i) Candidates should possess a local first degree plus teacher training in primary education, or equivalent qualifications. They should also meet the teaching experience requirement and complete training course(s) specified by or acceptable to the Permanent Secretary for normal promotion to this rank. The School Management Committee must submit justifications for the exceptional nature of the proposed appointment for which the Permanent Secretary will have discretion either to approve or reject having regard to the special circumstances.
 - (ii) Starting from the 2000/01 school year, new school heads and deputy heads should be limited to candidates holding a local first degree plus teacher training in primary education, or equivalent qualifications.
- 2. Type of work**

Either as the head of a primary school with 11 or less classes, or as the deputy head of a primary school with 12 or more classes.
- 3. Pay scale**

MPS Point 34-35
- 4. Period of probation**

2 years for direct entrants.

5. Promotion prospects Headmaster/Headmistress II

A Senior Primary School Master/Mistress will be eligible for consideration for promotion to Headmaster/Headmistress II after he/she has served successfully as follows in a primary school for at least 5 years:

Either

- (i) as a Senior Primary School Master/Mistress;

Or

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

(updated on 1 September 2016)

6. Any other remarks

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

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

(updated on 1 September 2011)

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

GUIDE TO APPOINTMENT**Aided Primary Schools****Primary School Master/Mistress****I. Senior Teacher**

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

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|------------------------------------|--|
| 1. Appointment requirements | <p>(a) <u>Normally - Promotion/Regrading</u></p> <p>(i) Promotion - promotion rank for Assistant Primary School Master/Mistress.</p> <p>(ii) Regrading – An Assistant Master/Mistress [including AM(SGT)] serving in the nominating primary school with a local first degree is eligible for consideration for regrading as Primary School Master/Mistress.</p> <p>(b) <u>Exceptionally - Director Entry</u></p> <p>Candidates should possess a local first degree plus teacher training in primary education, or equivalent qualifications. They should also meet the teaching experience requirement and complete training course(s) specified by or acceptable to the Permanent Secretary set for normal promotion to this rank. The School Management Committee must submit justifications for the exceptional nature of the proposed appointment for which the Permanent Secretary will have discretion either to approve or reject having regard to the special circumstances.</p> |
| 2. Type of work | Senior Teacher with duties in addition to class teaching. |
| 3. Pay scale | MPS Point 30-33 |
| 4. Period of probation | 2 years for direct entrants. |
| 5. Promotion prospects | Senior Primary School Master/Mistress or Headmaster/Headmistress II. |

(a) Senior Primary School Master/Mistress

A Primary School Master/Mistress will be eligible for consideration for promotion to Senior Primary School Master/Mistress after he/she has served successfully as a Senior Teacher in a primary school for at least 2 years, and undertaken training course(s) specified by or acceptable to the Permanent Secretary.

(b) Headmaster/Headmistress II.

A Primary School Master/Mistress will be eligible for consideration for promotion to Headmaster/Headmistress II after he/she has served successfully as follows in a primary school for at least 5 years:

Either

(i) as a Primary School Master/Mistress;

or

(ii) as an Assistant Master/Mistress and then as a Primary School Master/Mistress.

(updated on 1 September 2016)

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

6. Any other remarks

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

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Primary School Master/Mistress****II. Student Guidance Teacher**

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

1. Appointment requirements**(a) Normally –Regrading**

A serving Assistant Master/Mistress (Student Guidance Teacher) with a local first degree or equivalent is eligible for consideration for regrading as Primary School Master/Mistress (Student Guidance Teacher) under sponsor-based entitlement.

(b) Exceptionally - Direct Entry

(i) Candidates should possess a local first degree plus teacher training in primary education, or equivalent qualifications. They should also have completed successfully the necessary training in student guidance and should possess no less than five years' experience in government/aided primary school(s), with at least two of which as Student Guidance Teachers. Necessary training refers to the Pre-service Training Course for Student Guidance Teachers conducted by the former Education Department or the existing Education Bureau, or the Certificate Course on Student Guidance for Teachers of Primary Schools conducted by a local tertiary institute or its equivalent.

(ii) The School Management Committee must submit justifications for the exceptional nature of the proposed appointment, which the Permanent Secretary will have discretion either to approve or reject, having regard to the special circumstances.

- 2. Type of work** In addition to the existing duties in his/her serving primary school(s), a Primary School Master/Mistress (Student Guidance Teacher) is expected to assist his/her sponsoring body in the following areas :
- (i) Overall coordination of student guidance service and the implementation of the Comprehensive Student Guidance Service;
 - (ii) Co-ordination of staff development for Student Guidance Teachers;
 - (iii) Mobilisation of community resources in the delivery of student guidance service among its primary schools;
 - (iv) Overall evaluation of the student guidance service;
 - (v) Identification and sharing of good practices among Student Guidance Teachers.
- 3. Pay scale** MPS Point 30-33
- 4. Period of probation** 2 years for direct entrants.
- 5. Promotion prospects** Nil
- 6. Any other remarks**
- (a) The entitlement and appointment of these posts are considered separately under the same sponsoring body.
 - (b) A Primary School Master/Mistress (Student Guidance Teacher) regraded from the rank of Assistant Master/Mistress (Student Guidance Teacher) will enter at the minimum of the Primary School Master/Mistress pay scale with his/her new incremental date determined by the date of regrading. If the date of regrading falls on or between the 1st and the 15th day of the month, the incremental date will be taken to be the first day of that month. If the date of regrading falls on or between the 16th day and the end of the month, the incremental date will be taken to be the first day of the following month.

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Assistant Primary School Master/Mistress**

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

- 1. Appointment requirements**

New Recruitment

 - (a) Candidates should possess a local first degree plus teacher training in primary education, or equivalent qualifications.
 - (b) Regrading Serving Teachers

A Certificated Master/Mistress serving in the nominating primary school with a local first degree is eligible for consideration for regrading as Assistant Primary School Master/Mistress.
- 2. Type of work**

Mainly deployed as teacher of senior primary classes.
- 3. Pay scale**
 - (a) MPS Point 17-29 for those appointed before 1.4.2000
 - (b) MPS Point 12-29 for those appointed between 1.4.2000 and 31.7.2007 (both dates inclusive)
 - (c) MPS Point 17-29 for those appointed between 1.8.2007 and 30.9.2010 (both dates inclusive)
 - (d) MPS Point 15-29 for those appointed on or after 1.10.2010

Note: Untrained Assistant Primary School Master/Mistress will not be allowed to proceed beyond a salary bar as specified below:

 - (a) Bar at MPS Point 27 for those appointed before 1.4.2000
 - (b) Bar at MPS Point 22 for those appointed between 1.4.2000 and 30.9.2010 (both dates inclusive)
 - (c) Bar at MPS Point 20 for those appointed on or after 1.10.2010

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

2 years for direct entrants.

5. Promotion prospects

Primary School Master/Mistress.

An Assistant Primary School Master/Mistress possessing a Post-graduate Diploma/Certificate in Education, or a teacher's certificate from a Hong Kong College of Education/the Hong Kong Institute of Education, or equivalent will be eligible for consideration for promotion to Primary School Master/Mistress after he/she has served successfully as follows in a primary school for at least 5 years and undertaken training courses(s) specified by or acceptable to the Permanent Secretary:

Either

(i) as an Assistant Primary School Master/Mistress;

Or

(ii) as a Certificated Master/Mistress and then as an Assistant Primary School Master/Mistress.

6. Any other remarks

(a) Candidates without a Post-graduate Diploma/Certificate in Education, or a teacher's certificate from a Hong Kong College of Education/the Hong Kong Institute of Education, or equivalent will enter at the minimum of the pay scale on appointment.

(b) Candidates who also possess an appropriate Post-graduate Diploma/Certificate in Education, or a teacher's certificate from a Hong Kong College of Education/the Hong Kong Institute of Education, or equivalent will enter at the third point in the pay scale on appointment.

(c) Starting from 21 February 2002, the arrangement for the salary bar of a serving untrained teacher upon his/her regrading from a non-graduate rank to the rank of Assistant Primary School Master/Mistress, is as follows –

(i) If the pay point of the teacher concerned on appointment to the rank of Assistant Primary School Master/Mistress is below the prevailing salary bar of his/her new post, he/she can progress along the respective pay scale to the new salary bar point. Subject to the acquisition of acceptable teacher training qualification, he/she can proceed beyond the appropriate salary bar point to the maximum of the respective pay scale; and

- (ii) If the pay point of the teacher concerned on appointment to the rank of Assistant Primary School Master/Mistress is at or above the prevailing salary bar of his/her new post (due to, for example, the retention of his/her existing pay in the former non-graduate post under the special pay on appointment arrangements), his/her salary will be frozen at that pay point. Progression beyond the frozen pay point is subject to his/her acquisition of acceptable teacher training qualification, provided that the maximum of the respective pay scale is not exceeded.
- (d) A serving Assistant Primary School Master/Mistress who acquires a Post-graduate Diploma/Certificate in Education, or a teacher's certificate from a Hong Kong College of Education/the Hong Kong Institute of Education, or equivalent after pursuing a full-time or part-time course will be awarded two additional increments if he/she entered at the first point in accordance with paragraph 6(a) or has not been previously awarded additional increments on the strength of such, provided that the maximum of the salary scale is not exceeded. However, with effect from 1 September 2003, an untrained teacher regraded from Certificated Master/Mistress to Assistant Primary School Masters/Mistresses, who subsequently acquires acceptable teacher training qualification, will –
- (i) be eligible for the award of two additional increments if, other than through possession of recognized experience, he/she entered at the minimum point of the Assistant Primary School Masters/Mistresses pay scale prevailing at the time he/she was regraded, provided that the maximum of the pay scale is not exceeded; or (*updated on 1 November 2013*)
- (ii) be eligible for the award of one additional increment if, other than through possession of recognized experience, he/she entered at one point above the minimum point of the Assistant Primary School Masters/Mistresses pay scale prevailing at the time he/she was regraded, provided that the maximum of the pay scale is not exceeded; or (*updated on 1 November 2013*)
- (iii) not be eligible for the award of any additional increment if, other than through possession of

recognized experience, he/she entered at two or more points above the minimum point of the Assistant Primary School Masters/Mistresses pay scale prevailing at the time he/she was regraded. *(updated on 1 November 2013)*

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

(updated on 1 September 2010)

GUIDE TO APPOINTMENT
Aided Primary Schools
Principal Assistant Master/Mistress

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

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| 1. Appointment requirements | N.A.
(Note : Starting from the 2000/01 school year, no non-degree holders should be appointed as new school heads. Serving heads at PAM rank who are non-degree holders will be accommodated until natural wastage.) |
| 2. Type of work | Head of a primary school with 24 classes or more. |
| 3. Pay scale | MPS Point 34-39
(Bar at MPS Point 36, the passage of which requires acquiring a Bachelor of Arts Degree in Primary Education, or equivalent) |
| 4. Period of probation | N.A. |
| 5. Promotion prospects | Nil |
| 6. Any other remarks | Nil |

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Senior Assistant Master/Mistress**

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

- 1. Appointment requirements** N.A
(Note : Starting from the 2000/01 school year, no non-degree holders should be appointed as new school heads. Serving heads at SAM rank who are non-degree holders will be accommodated until natural wastage.)
- 2. Type of work** Head of a primary school with 12-23 classes.
- 3. Pay scale** MPS Point 30-33C
(Bar at MPS Point 33, the passage of which requires acquiring a Bachelor of Arts Degree in Primary Education, or equivalent)
- 4. Period of probation** N.A.
- 5. Promotion prospects** Refer to *Any other remarks* below
- 6. Any other remarks** A serving Senior Assistant Master/Mistress with local first degree or equivalent qualifications is allowed to compete with Headmaster/Headmistress II for promotion to the next higher rank in the school or in schools operated by the same sponsoring body.

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Assistant Master/Mistress****I. Senior Teacher**

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

- 1. Appointment requirements**
 - (a) Normally – Promotion

Promotion rank for Certificated Master/Mistress.
 - (b) Exceptionally - Direct entry

Candidates should have fulfilled all requirements for normal promotion to this rank. The Permanent Secretary may require the School Management Committee to submit justifications for the exceptional nature of the proposed appointment for which the Permanent Secretary will have discretion either to approve or reject having regard to the special circumstances.
- 2. Type of work**

Senior Teacher in a primary school with duties in addition to class teaching.
- 3. Pay scale**

MPS Point 25-29
- 4. Period of probation**

Two years for direct entrants.
- 5. Promotion prospects**

Senior Primary School Master/Mistress

An Assistant Master/Mistress with a local first degree or equivalent qualification will be eligible for consideration for promotion to Senior Primary School Master/Mistress after he/she has served successfully for at least 2 years as an Assistant Master/Mistress in a primary school and undertaken training course(s) specified by or acceptable to the Permanent Secretary.

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Assistant Master/Mistress****II. Student Guidance Teacher**

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

1. Appointment requirements**(a) Normally – Acting**

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

(b) Exceptionally – Direct Entry

The School Management Committee may appoint a teacher with the necessary experience and training for direct entry to Assistant Master/Mistress (Student Guidance Teacher). Candidates should be experienced qualified primary school teachers who have no less than five years' experience serving in government/aided primary school(s), and at least two of which as Student Guidance Teachers. The candidate should also have completed the necessary training when the appointment is offered. Necessary training refers to the Pre-service Training Course for Student Guidance Teachers conducted by the former Education Department or the Education Bureau, or the Certificate Course on Student Guidance for Teachers of Primary Schools conducted by a local tertiary institute or its equivalent. The School Management Committee must submit justifications for the exceptional nature of the proposed appointment for which the Permanent Secretary will have discretion either to approve or reject having regard to the special circumstances.

- 2. Type of work** An Assistant Master/Mistress (Student Guidance Teacher) helps to coordinate the service of a school-based guidance team and to implement the Comprehensive Student Guidance Service including formulating a student guidance policy, promoting the personal growth education, providing responsive service to students and supportive service to parents and teachers.
- 3. Pay scale** MPS Point 25-29
- 4. Period of probation** Two years for direct entrants.
- 5. Promotion prospects** Refer to *Any other remarks* below.
- 6. Any other remarks**
- (a) A serving Assistant Master/Mistress (Student Guidance Teacher) with a local first degree or equivalent is eligible for consideration for regrading as Primary School Master/Mistress under school-based entitlement or Primary School Master/Mistress (Student Guidance Teacher) under sponsor-based entitlement.
 - (b) An Assistant Master/Mistress (Student Guidance Teacher) under school-based entitlement with a local first degree or equivalent qualification will be eligible for consideration together with other eligible senior teachers in the school for promotion to Senior Primary School Master/Mistress after he/she has served successfully for at least 2 years as an Assistant Master/Mistress in a primary school and undertaken training course(s) specified by or acceptable to the Permanent Secretary.

(updated on 1 September 2008)

GUIDE TO APPOINTMENT**Aided Primary Schools****Certificated Master/Mistress**

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

- 1. Appointment requirements**
 - (a) Certificate in Primary Education from the Hong Kong Institute of Education/Teacher's Certificate from a College of education in Hong Kong obtained after a 3-year full-time training course or an equivalent qualification; or
 - (b) A non-standard qualification acceptable to the Permanent Secretary

- 2. Type of work**
 - (a) Class teacher in an aided primary school; and
 - (b) Other duties as the Head of the school may require.

- 3. Pay scale**

Basic scale

 - (a) MPS Point 14-24 for those appointed before 1.4.2000
 - (b) MPS Point 12-24 for those appointed between 1.4.2000 and 31.7.2007 (both dates inclusive)
 - (c) MPS Point 14-24 for those appointed on or after 1.8.2007

Note: Untrained Certificated Master/Mistress will not be allowed to proceed beyond a salary bar as specified below:

 - (a) Bar at MPS Point 19 for those appointed between 1.1.1999 and 31.3.2000 (both dates inclusive)
 - (b) Bar at MPS Point 17 for those appointed between 1.4.2000 and 31.7.2007 (both dates inclusive)
 - (c) Bar at MPS Point 19 for those appointed on or after 1.8.2007

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

- 4. Period of probation** Two years.

5. Promotion prospects

Assistant Master/Mistress.

A Certificated Master/Mistress with:

- (a) Certificate in Primary Education from the Hong Kong Institute of Education/Teacher's Certificate from a College of Education in Hong Kong obtained after a three-year full-time training course or an equivalent qualification; or
- (b) the status of qualified teacher awarded after passing the Non-Graduate Teacher Qualifications Assessment (NGTQA) and the successful completion of an In-service Course of Training for Teachers in Primary Schools or a period of supervised teaching for at least one year; or
- (c) equivalent qualifications

will be eligible for consideration for promotion to Assistant Master/Mistress after he/she has served successfully as a Certificated Master/Mistress in a primary school for at least 5 years and undertaken training course(s) specified by or acceptable to the Permanent Secretary. Certificated Masters/Mistresses not possessing teacher training or an equivalent qualification but appointed prior to 1 January 1991 will be eligible for consideration for promotion to Assistant Master/Mistress.

6. Any other remarks

- (a) Direct entrants with non-standard qualifications will be appointed to a point, or sub-point, of the salary scale considered appropriate by the Permanent Secretary.
- (b) A salary bar is specified in paragraph 3 above, beyond which untrained teachers will not be allowed to proceed. Other than those holders of qualifications acquired through the Non-Graduate Teacher Qualifications Assessment (NGTQA), serving Certificated Masters/Mistresses who are appointed at a sub-point of the scale without teacher training and who successfully undertake a part-time In-Service Course of Teacher Training may be awarded an additional increment if they are not already at the top of the basic scale.
- (c) For appointment as Certificated Master/Mistress in aided primary schools, a holder of the following qualifications acquired through the NGTQA is regarded as having a non-standard qualification acceptable to the Permanent Secretary:

- (i) An Assessment Certificate (Primary Level) issued by the Education Bureau certifying the holder having passed Part I and Part II of the NGTQA;
- or
- (ii) An Assessment Certificate (Primary Level) issued by the Education Bureau certifying the holder having passed Part I, Part II and Part III of the NGTQA.
- (d) Starting from 1 August 2007, holders of the above non-standard qualification acquired through the NGTQA in paragraph 6(c)(i) or (ii) above will enter at MPS Point 12 upon appointment in an aided primary school. Teachers holding the qualification specified in paragraph 6(c)(i) above shall be allowed to proceed beyond MPS Point 19 of the Certificated Master/Mistress pay scale upon successful completion of an In-service Course of Training for Teachers in Primary School in a College of Education/the Hong Kong Institute of Education. No additional increment will be awarded for the successful completion of the In-service Course of Training for Teachers in Primary School. Teachers holding the qualification specified in paragraph 6(c)(ii) above shall be allowed to proceed beyond MPS Point 19 of the Certificated Master/Mistress pay scale after having successfully completed a period of supervised teaching for at least one year in a primary school or the primary section of a special school. An additional salary increment will be awarded to such teachers after successfully completing the supervised teaching period. No Additional increment will be awarded to such teachers for subsequent completion of an In-service Course of Training for Teachers in Primary School.
- (e) With effect from 1.9.2006, untrained teachers with specified non-standard qualifications (such as Approved Post-secondary Secondary College diplomas) will not be accepted for new appointment or reappointment as CM after a break in service.

(updated on 1 September 2010)

GUIDE TO APPOINTMENT**Aided Primary Schools****Educational Psychologist I**

1. **Qualifications and Experience for Appointment :**

Candidates should have :

 - (a) a first degree in Psychology from a local university or equivalent;
 - (b) a Master's degree in Educational Psychology (Professional Practice) from a local university or equivalent;
 - (c) a Post Graduate Certificate in Education from a local university or equivalent;
 - (d) obtained full membership of the Division of Educational Psychology of the Hong Kong Psychological Society or an equivalent status in an internationally recognised professional organization of Educational Psychology (applicable to those appointed on or after 1.9.2012);
 - (e) a minimum of 6 years' relevant post-degree experience of which at least 3 years should be as an Educational Psychologist;
 - (f) good command of Cantonese and written Chinese; and
 - (g) good command of spoken and written English.

2. **Duties :**

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

 - (a) Student support level
 - To provide assessment, counseling and guidance services for students;
 - To provide intervention or behavioural guidance programmes for students directly and/or in collaboration with school personnel such as teachers, school social workers and/or speech therapists, etc.; and
 - To promote home-school co-operation in child management and deliver parent training programmes in collaboration with school personnel.

(b) Teacher support level

- To support teachers in the early identification of at risk students as well as the planning and implementation of appropriate intervention measures for them;
- To advise teachers on measures to enhance learning and teaching effectiveness as well as behaviour support, including the formulation of individual education plans for the students;
- To advise teachers and school social workers in planning and implementing school-based psycho-educational programmes for students;
- To support teachers in school-based action research related to the domains of student support as well as learning and teaching; and
- To conduct staff development training to equip school personnel with the necessary professional knowledge and skills to meet the personal, social and special educational needs of students.

(c) School system level

- To support schools in developing whole-school policies to cater for student diversity;
- To support schools in developing effective mechanism to meet the diverse educational needs of their students;
- To support schools in developing policy and mechanism on crisis management and to render crisis management service to schools whenever necessary.

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

3. Salary Scale : MPS Point 34 - 44
4. Period of Probation : 2 years for direct entrants
5. Promotion Prospects: Nil
6. Any Other Remarks : (a) Holders of degrees other than those from a local university or equivalent may apply, but should attach copies of transcripts of studies to their applications.

- (b) The candidate must be eligible for graduate membership of the Hong Kong Psychological Society or the British Psychological Society or equivalent. The Master's Degree in Educational Psychology (Professional Practice) obtained must be one which can prepare the candidate for independent professional work as an educational psychologist.
- (c) The requirement for a candidate to obtain full membership of the Division of Educational Psychology of the Hong Kong Psychological Society or an equivalent status in an internationally recognised professional organization of Educational Psychology in Para 1(d) is also applicable to the existing educational psychologist incumbents who take up a new appointment in another school as Educational Psychologist I on or after 1.9.2012.

(updated on 1 November 2012)

GUIDE TO APPOINTMENT**Aided Primary Schools****Educational Psychologist II**

1. **Qualifications and Experience for Appointment :**

Candidates should have :

 - (a) a first degree in Psychology from a local university or equivalent;
 - (b) a Master's degree in Educational Psychology (Professional Practice) from a local university or equivalent;
 - (c) obtained full membership of the Division of Educational Psychology of the Hong Kong Psychological Society or an equivalent status in an internationally recognised professional organization of Educational Psychology or been eligible for such membership. Candidate so eligible shall obtain such full membership within nine months after appointment*. (This requirement is applicable to those appointed as Educational Psychologist II on or after 1.9.2012 and the existing educational psychologist incumbents who take up a new appointment in another school as Educational Psychologist II on or after 1.9.2012);
 - (d) good command of Cantonese and written Chinese; and
 - (e) good command of spoken and written English.

2. **Duties :**

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

 - (a) Student support level
 - To provide assessment, counseling and guidance services for students;
 - To provide intervention or behavioural guidance programmes for students directly and/or in collaboration with school personnel such as teachers, school social workers and/or speech therapists, etc.; and

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

- To promote home-school co-operation in child management and deliver parent training programmes in collaboration with school personnel.

(b) Teacher support level

- To support teachers in the early identification of at risk students as well as the planning and implementation of appropriate intervention measures for them;
- To advise teachers on measures to enhance learning and teaching effectiveness as well as behaviour support, including the formulation of individual education plans for the students;
- To advise teachers and school social workers in planning and implementing school-based psycho-educational programmes for students;
- To support teachers in school-based action research related to the domains of student support as well as learning and teaching; and
- To conduct staff development training to equip school personnel with the necessary professional knowledge and skills to meet the personal, social and special educational needs of students.

(c) School system level

- To support schools in developing whole-school policies to cater for student diversity;
- To support schools in developing effective mechanism to meet the diverse educational needs of their students; and
- To support schools in developing policy and mechanism on crisis management and to render crisis management service to schools whenever necessary.

3. Salary Scale :

- (a) MPS Point 25-33 for those appointed before 1.4.2000
- (b) MPS Point 20-33 for those appointed between 1.4.2000 and 31.7.2007 (both dates inclusive)
- (c) MPS Point 25-33 for those appointed between 1.8.2007 and 30.9.2010 (both dates inclusive)
- (d) MPS Point 23-33 for those appointed on or after 1.10.2010

4. Period of Probation : 2 years

5. Promotion Prospects: Educational Psychologist I.

Educational Psychologist II will be eligible for consideration for promotion to Educational Psychologist I if they have obtained:

(a) A Post Graduate Certificate in Education from a local university or equivalent; and

(b) 6 years' relevant post-degree experience of which at least 3 years should be as an Educational Psychologist II; and

(c) Full membership of the Division of Educational Psychology of the Hong Kong Psychological Society or an equivalent status in an internationally recognised professional organization of Educational Psychology; and

(d) Satisfactory service as Educational Psychologist II. School should take into account the work performance, professional expertise, and other personal attributes, such as leadership, commitment, interpersonal skills, judgment, planning and organization abilities, etc. of the candidate when considering promotion. (*updated on 1 November 2013*)

6. Any Other Remarks : (a) Holders of degrees other than those from a local university or equivalent may apply, but should attach copies of transcripts of studies to their applications

(b) The candidate must be eligible for graduate membership of the Hong Kong Psychological Society or the British Psychological Society or equivalent. The Master's Degree in Educational Psychology (Professional Practice) obtained must be one which can prepare the candidate for independent professional work as an educational psychologist.

(*updated on 1 November 2012*)

Conditions of Appointment for Clerical Staff

(Note: For aided primary schools whose clerical staff are paid out of the approved Salaries Grant.)

1. The conditions of appointment for the post of Assistant Clerical Officer/Clerk Class II are :
 - (a) Either 5 subjects, including English Language at 'Level 2' or above in the Hong Kong Diploma of Secondary Education Examination OR 4 subjects, including English Language, one of which must be at 'Level 2' or above and the others at 'Level 3' or above or equivalent; OR
(updated on 1 November 2012)
 - (b) Either 5 subjects, including English Language (Syllabus B) at Grade E or above in the Hong Kong Certificate of Education Examination OR 4 subjects, including English Language (Syllabus B), one of which must be at Grade E or above and the others at Grade C or above; OR
 - (c) a Grade C or above in English Language (Syllabus A) in the Hong Kong Certificate of Education Examination, together with EITHER 4 other subjects at Grade E or above OR 3 other subjects at Grade C or above or equivalent; OR
 - (d) 5 subjects, including English, at Grade E or above in the Hong Kong Certificate of Education Examination (English) OR 4 subjects, including English, one of which must be at Grade E or above and the other at Grade C or above (awarded before 1974); OR
 - (e) a Grade C or above in English in the Hong Kong Certificate of Education Examination (Chinese) together with EITHER 4 other subjects at Grade E or above OR 3 other subjects at Grade C or above (awarded before 1974); OR
 - (f) a Hong Kong English School Certificate (awarded before 1968) with a pass in English; OR
 - (g) a Hong Kong Chinese School Certificate (awarded before 1968) with a credit in English.

Note:

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

(updated on 1 September 2009)

2. Conditions of appointment for the post of Clerical Assistant are:
 - (a) Education: Secondary 4 (all subjects) in a registered school; and
 - (b) Good working knowledge of English.

3. Salary Scale

	Points on Master Pay Scale
Assistant Clerical Officer/Clerk Class II	3 - 15 if appointed before 1.4.2000 2 - 15 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 3 - 15 if appointed on or after 1.8.2007
Clerical Assistant	1 - 10 if appointed before 1.4.2000 0 - 10 if appointed between 1.4.2000 and 31.7.2007 (both dates inclusive) 1 - 10 if appointed on or after 1.8.2007

**Conditions for Promotion and Acting Appointments
in Aided Primary Schools****General**

- I. All promotions are subject to the following conditions as appropriate: -
- (1) All eligible candidates must be assessed by a board the School Management Committee appointed for the selection exercise. The selection board shall recommend a suitable candidate, if available, for the consideration and approval of the School Management Committee. However, the approval of the Permanent Secretary is required for cases of promotion and acting appointment to the post of school head, and direct entry to promotion posts (except Educational Psychologist I). For such cases, the application must be endorsed by the School Management Committee before submission to the Permanent Secretary for consideration. *(updated on 1 November 2012)*

Conditions for Promotion of Teaching Staff

- (2) The conditions for promotions of teachers to the next higher rank are contained in the guides to appointments in Attachments B, C, D, E, G, H and I of Appendix 5.
- (3) The candidate must have undertaken training(s) specified by or acceptable to the Permanent Secretary in order to be eligible for substantive promotion. Those who have met all other promotion requirements except the specified training may be allowed to act in the promotion posts. The teachers may be confirmed to the promotion ranks with retrospective effect from the date of the approved acting appointment provided that they complete/acquire the specified training in the same academic year. If a teacher acting in the promotion post fails to successfully complete/acquire the required training within the prescribed period and with no acceptable reasons, the School Management Committee should make an alternative appointment for the promotion post.

Conditions for Appointment to the Additional Senior Teacher Post of English

- (4) To be eligible for consideration for promotion/direct appointment to the additional senior teacher post of English provided, candidates should –
 - (a) fulfill the appointment requirements laid down in the Guides to Appointment for PSM and AM in Appendix 5; and
 - (b) attain an average proficiency at Level 4 of the English Language Proficiency Requirement (LP4), i.e. to meet both of the following criteria –
 - (i) The teacher has attained at least Level 3 in all the five papers in the Language Proficiency Requirement for English teachers. Specifically, the teacher has to attain '3' or above in Reading and Listening. For Writing, Speaking and Classroom Language Assessment (CLA), the teacher has to attain, in one sitting, '3' or above in all the scales of the respective papers; AND
 - (ii) At least three papers are at Level 4 or above. For Writing, Speaking and CLA, Level 4 is deemed to have been attained if more than half of the scales of the respective papers are scored, in one sitting, at '4' or above (i.e. having attained Level 4 in three or more scales in Writing and CLA and four or more scales in Speaking).

- (5) Incumbents of existing senior teacher posts of English appointed before 1 September 2001 taking charge of the panel of English should not be affected by the introduction of LP4. An existing senior teacher of English on transfer, without break of service, to take up an existing senior teacher post of English in another school under the same sponsoring body within the aided primary school sector and a teacher given an offer of promotion/direct appointment to an existing senior teacher post of English, which was to take effect in the 2001/02 school year, on or before 18 October 2001 would not be subject to the LP4 requirement. However, whenever an existing senior teacher post of English is vacated, the school, in filling the vacated post,
- (a) should accord priority to LP4 qualified candidates; and
 - (b) may employ a teacher who has met the basic Language Proficiency Requirement, should it be unable to find a suitable candidate who is LP4 qualified.

In addition, incumbents of existing senior teacher posts of English who are not LP4 qualified are encouraged to acquire the LP4 qualification through the Language Proficiency Assessment for Teachers or through training or through a combination of both.

Conditions for Promotion of Educational Psychologists

- (6) The conditions for promotion of an Educational Psychologist II to Educational Psychologist I are contained in the guides to appointments in Attachments J and K of Appendix 5. (*updated on 1 November 2012*)

Teaching Staff's Contracts in Aided Schools**1. School's entering into a contract with a teacher immediately after probation**

The School Management Committee should enter into a contract with a teacher immediately after his two years of probationary period. The contract may not be subject to annual re-newal.

2. Dismissal/Termination of appointment of a teacher after probation

The procedures relating to Dismissal or Termination of Appointment of a teacher as spelt out in Appendix 8 should be observed strictly.

3. Dismissal/Termination of Appointment of a teacher in the middle of the academic year during probationary period

The procedures relating to Dismissal or Termination of appointment of a teacher as spelt out in Appendix 8 should be observed strictly.

4. Dismissal/Termination of appointment of a teacher at the end of the first and second academic year during probationary period

If a teacher is still found by the School Management Committee to be performing his duties in an unsatisfactory manner (including personality, character and philosophy of education), and showing no improvement in his work after being advised, the School Management Committee can opt for any one of the following three measures:

- either (a) To follow the procedures with regard to Dismissal or Termination of Appointment of a teacher as spelt out in Appendix 8.
- or (b) A verbal warning can be given to the teacher by the school Head. The content of the warning should be noted down in the school record for future reference. The teacher, to whom the warning is given, may note down the content of the warning for his own reference and improvement.
- or (c) After informing verbally the teacher of his shortcomings, the school Head may serve the teacher a written letter, listing the weaknesses mentioned in their discussion, and may ask the teacher to sign in acknowledgement of the letter.

For the School Management Committee opting for (b) or (c), the following points should be observed:

- (i) It is not necessary for the School Management Committee to notify the Permanent Secretary of such verbal warning(s). However, the record(s) should be made available for inspection by the officers of the Education Bureau, if and when required.
- (ii) The written letter should be copied to the Education Bureau for record purpose. The Permanent Secretary may investigate at the request of the teacher concerned.
- (iii) If the teacher concerned takes no notice of the verbal warning(s), the School Management Committee may terminate the appointment of the teacher by giving one month's notice at the end of the school year.

**Procedure to be followed in case of Dismissal
or Termination of Appointment of a Teacher**

The procedure to be followed by the School Management Committee should be as follows :

- (a) The teacher concerned should be given a warning, or warnings that his work is unsatisfactory. This should be recorded in the school files.
- (b) If no improvement in the teacher's work is noticeable after an appropriate period then a formal written warning embodying relevant criticisms should be given to the teacher, and a copy of this letter should be forwarded to the Permanent Secretary. This should be recorded in the school files.
- (c) On receipt of this letter the Permanent Secretary shall investigate the circumstances.
- (d) If the teacher after receiving the warning letter still shows no improvement after an appropriate period, normally not less than one month, and the School Management Committee intends to dismiss him or not to renew his contract after the date of expiry, the Supervisor shall so inform the Permanent Secretary.
- (e) In each case of dismissal of a teacher, a sufficient period of notice of termination of employment must be given in accordance with Section 57.

**Payment of Salaries on Appointment, Resignation,
Retirement or Termination of Appointment**

1. (a) A teacher with one academic year's service or more without break whose appointment terminates no earlier than the beginning of
 - (i) the major school holidays, i.e., Christmas, Chinese New year and Easter will be paid to the end of the school holidays;
 - (ii) the Summer Vacation will be paid to the end of August.
 - (b) A teacher with service of less than one academic year but more than 59 days whose appointment terminates no earlier than the beginning of
 - (i) the major school holidays, i.e., Christmas, Chinese new year and Easter will be paid to the end of the school holidays;
 - (ii) the Summer Vacation will be paid to the end of July.
 - (c) A teacher with service of 59 days or less shall be paid up to and including the last day of the performance of full duties.
 - (d) A teacher who resigns from one aided school to take up a new appointment in another aided school on the commencement day of a new school year and without break in teaching service, will be paid by the school he leaves for the period up to and including the last day of performance of full duties in that school, and by the school to which he is newly appointed from the day following his last day of performance of full duties in the former school.
2. In a newly-opened school the date of assumption of full duties shall normally be deemed to be the date of commencement of classes. The Permanent Secretary may approve, for purposes of grant, the appointment of staff who are required for essential preliminary planning of new schools in advance of the date of commencement of classes, and in the case of reprovioned schools, he may approve the continued payment of the salaries of staff of the original school should the completion of the building be delayed beyond the scheduled date.

Grant of Sick Leave, Special Tuberculosis Leave and Paternity Leave**(A) For Teachers**1. **Sick Leave**

- (a) Full-time monthly-paid teachers including temporary monthly-paid teachers may be granted up to 28 days paid sick leave in their first year of service in an aided school and on completion of each succeeding year of service, a further 48 days will be granted. Paid sick leave can be accumulated up to a maximum of 168 days. The calculation of leave entitlement for part-time monthly-paid teachers should be the same as the full-time monthly paid teachers. However, with effect from 1 September 2006, a teacher with a break of service of more than 1 year will forfeit his/her sick leave balance. *(updated on 16 November 2006)*
- (b) Daily-rated supply teachers who have worked under a continuous contract for not less than 4 weeks are eligible for sickness allowance at the rate of two paid sickness days for each completed month of employment in accordance with the Employment Ordinance.
- (c) Sick leave exceeding two days should be supported by a valid medical certificate issued by a registered medical practitioner, a registered dentist or a registered Chinese medicine practitioner*. *(updated on 29 January 2007)*
- (d) No-pay sick leave may be granted if a teacher's leave balance/entitlement has been exhausted.

2. **Special Tuberculosis Leave**

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

Service under all these provisions means service deemed to be continuous by the Permanent Secretary. *(updated on 29 January 2007)*

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

3. Paternity Leave

Teachers with not less than 40 weeks' continuous service immediately before taking the paternity leave are eligible for full-pay paternity leave up to 5 working days. Schools are required to follow the administration arrangements of paternity leave as set out in the prevailing circular available on the Education Bureau homepage. (*updated on 1 September 2016*)

(B) For Educational Psychologists

Educational psychologists shall enjoy such benefits as teachers with regard to sick leave, special tuberculosis leave and paternity leave. (*updated on 1 September 2016*)

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

Grant of Maternity Leave

(A) For Teachers

1. Female teachers who have completed 40 weeks of resident service prior to the commencement of maternity leave may be granted 10 weeks full-pay maternity leave. There is no limitation on the number of surviving children that a female teacher may have in order to be qualified for maternity leave pay.
2. Female teachers employed under a continuous contract but with less than 40 weeks of resident service may be granted maternity leave without pay. The calculation of leave entitlement for part-time monthly-paid teachers should be the same as the full-time monthly-paid teachers.
3. Maternity leave shall be the aggregate of-
 - (a) a continuous period of 10 weeks from and inclusive of –
 - (i) the date of commencement of maternity leave as determined under section 12AA of the Employment Ordinance (see below); or
 - (ii) the actual date of confinement, if confinement occurs before the date of commencement mentioned in subparagraph (i);
 - (b) a further period equal to the number of days, if any, beginning on the day after the expected date of confinement up to and including the actual date of confinement; such further period of leave is to be taken immediately following the period of leave under paragraph (a); and
 - (c) a further period, not exceeding 4 weeks, on grounds of illness or disability arising out of pregnancy or confinement.

Under section 12AA of the Employment Ordinance, a pregnant employee may, with the agreement of the employer, decide on the date of commencement of her 10 weeks maternity leave, provided that such date is within a period of not less than 2 weeks before, and not more than 4 weeks before, the expected date of confinement. If the employee does not exercise her option to decide on the date of commencement, or if she fails to secure her employer's agreement to her proposed leave schedule, the date of commencement of maternity leave shall be 4 weeks immediately before the expected date of confinement. The entitlement to pay is, however, limited to the period of 10 weeks. An accurate record of any maternity leave granted shall be kept by the school.

4. When more absence is recommended by a registered medical practitioner or a registered Chinese medicine practitioner, additional maternity leave may be granted as no-pay leave to bring the total absence up to 6 months. Further leave without pay on the same terms may be granted. (*updated on 29 January 2007*)
5. The following categories of female teachers will also be eligible for full pay for any part of the maternity leave which falls within a major school holiday, i.e. Christmas, Chinese New Year, Easter and Summer Vacation –

- (a) Female teachers whose maternity leave exceeds 10 weeks as provided in paragraph 3(a) and the excess portion of maternity leave as provided in paragraph 3(b) and/or 3(c) falls wholly or partly within a major school holiday; and
 - (b) Female teachers who are employed under a continuous contract but have less than 40 weeks' resident service to qualify for full pay maternity leave and whose maternity leave as provided in paragraph 3 falls wholly or partly within a major school holiday.
6. Maternity leave is not counted as sick leave.
7. A female teacher is not entitled to maternity leave whilst absent from duty for other reasons.
8. A female teacher has to serve notice of pregnancy and of her intention to take maternity leave to her employer after her pregnancy has been confirmed by a valid medical certificate issued by a registered medical practitioner, a registered midwife or a registered Chinese medicine practitioner (except for the certificate of the actual date of confinement). If required by the employer, the female teacher has to produce a medical certificate which specifies the expected date of confinement for the 10 weeks of maternity leave under subparagraph 3(a)(i) or a medical certificate which specifies the date of confinement for the 10 weeks of maternity leave under subparagraph 3(a)(ii). A female staff who may take any period of maternity leave under paragraph 3(b) shall, if so required by her employer, produce a medical certificate specifying the date of confinement. *(updated on 29 January 2007)*
9. A pregnant female teacher may, on producing a medical certificate issued by a registered medical practitioner or a registered Chinese medicine practitioner with an opinion as to her unfitness to handle heavy materials, work in places where gas injurious to pregnancy is generated, or do other work injurious to pregnancy as specified in the medical certificate, request her employer to refrain from giving her such work during her pregnancy period. *(updated on 29 January 2007)*

(B) For Educational Psychologists

Female educational psychologists shall enjoy such benefits as female teachers with regard to maternity leave. *(updated on 1 November 2012)*

Paid Annual Leave Entitled by Educational Psychologists

1. Educational psychologists paid out of the Salaries Grant, who do not enjoy school holidays, will be granted full pay leave on an annual basis. Such leave shall be taken during the major school holidays, subject to mutual agreement between the school and the staff. No replacement will be granted for educational psychologists on such leave.
 - (a) Educational psychologists paid out of the Salaries Grant appointed before 1 June 2000 may be granted not less than 22 days of paid leave on an annual basis.
 - (b) For educational psychologists offered appointments on or after 1 June 2000, their entitlement to annual leave with pay is as follows:

<u>Salary Point</u>	<u>Less than 10 years of service</u>	<u>10 years of service and over</u>
MPS Point 14 and above	18 days	22 days

2. The leave entitlement in paragraph (b) above does not apply to educational psychologists offered appointments before 1 June 2000 so long as:
 - (a) they remain in their present rank or get promoted to a higher rank in the same grade in their school; or
 - (b) they are deployed to the same rank from one aided school to another under the same sponsoring body; or
 - (c) they transfer to the same rank without a break of service within the aided school sector. Transfer within a period of 45 days will not be taken as break of service.

(updated on 1 November 2012)

Paid Annual Leave Entitled by Clerical Staff Paid out of Salaries Grant

1. For those clerical staff paid out of the Salaries Grant who were appointed before 1 June 2000, the School Management Committee may grant paid leave up to 14 days per annum to those with less than 10 years' service and 22 days per annum to those with more than 10 years' service.
2. For those clerical staff paid out of the Salaries Grant and offered appointments on or after 1 June 2000, their entitlement to annual leave with pay is as follows -

<u>Salary point</u> <u>(Master Pay Scale)</u>	<u>Less than 10 years of service</u>	<u>10 years of service and over</u>
	<u>(working days per year)</u>	
Pt. 0-13	14	18
Pt. 14 and above	18	22

3. The leave entitlement in paragraph 2 above does not apply to those clerical staff paid out of the Salaries Grant who were offered appointment before 1 June 2000 so long as -
 - (a) they remain in their present rank or get promoted to a higher rank in the same grade in their school; or
 - (b) they are deployed to the same rank from one aided school to another under the same sponsoring body; or
 - (c) they transfer to the same rank without a break of service within the aided school sector. Transfer within a period of 45 days will not be taken as break of service.
4. Paid leave shall be taken during long holidays.

Grant of Maternity Leave to Female Clerical Staff Paid out of Salaries Grant

1. Subject to the provisions of the Employment Ordinance, the School Management Committee of an aided primary school shall grant paid maternity leave to non-teaching staff who have completed 40 weeks of continuous service in the school prior to the commencement of maternity leave. There is no limitation on the number of surviving children that an employee may have in order to be qualified for maternity leave pay. Maternity leave shall be the aggregate of -
 - (a) a continuous period of 10 weeks from and inclusive of -
 - (i) the date of commencement of maternity leave as determined under section 12AA of the Employment Ordinance (see below); or
 - (ii) the actual date of confinement, if confinement occurs before the date of commencement mentioned in (i);
 - (b) a further period equal to the number of days, if any, beginning on the day after the expected date of confinement up to and including the actual date of confinement; such further period of leave is to be taken immediately following the period of leave under (a); and
 - (c) a further period, not exceeding 4 weeks, on grounds of illness or disability arising out of pregnancy or confinement.
2. Under section 12AA of the Employment Ordinance, a pregnant employee may, with the agreement of the employer, decide on the date of commencement of her 10 weeks maternity leave, provided that such date is within a period of not less than 2 weeks before, and not more than 4 weeks before, the expected date of confinement. If the employee does not exercise her option to decide on the date of commencement, or if she fails to secure her employer's agreement to her proposed leave schedule, the date of commencement of maternity leave shall be 4 weeks immediately before the expected date of confinement.
3. The entitlement to pay is, however, limited to the period of 10 weeks. An accurate record of any maternity leave shall be kept by the school.
4. A pregnant female employee may, on producing a medical certificate issued by a registered medical practitioner or a registered Chinese medicine practitioner with an opinion as to her unfitness to handle heavy materials, work in places where gas injurious to pregnancy is generated, or do other work injurious to pregnancy as specified in the medical certificate, request her employer to refrain from giving her such work during her pregnancy period.
(updated on 29 January 2007)

Subsidised Schools Provident Fund

Teachers joining the Subsidised Schools Provident fund are subject to the Rules of the Funds which are statutory rules made under the Education Ordinance. The following are extracts of certain main features for easy reference only.

1. With effect from 1 September 1980, Government's subsidies towards the employers' contribution in respect of the Subsidised Schools Provident Fund shall be made in accordance with the following scale :

<u>Length of continuous contributory service</u>	<u>Employers' contribution (percentage of employees' salary)</u>
Less than ten years	5%
Not less than 10 years) But less than 15 years)	10%
Not less than 15 years	15%

2. Employees' contribution shall remain at 5%.
3. Every teacher who is not over the age of 55 years upon his first appointment to a school on or after 24 June 1982 is required to contribute to the Fund. A part-time teacher employed on a regular basis may at his option contribute to the provident fund.
4. An annual dividend to each contributor of 5 percent of his account is guaranteed and any shortfall in funds for the purpose of the guaranteed dividend is to be met by a loan (repayable without interest) made by the Government to the Funds. No supplementary dividend may be declared if there is an outstanding loan.
5. Benefits to contributors are increased on the following sliding scale according to length of continuous contributory service on withdrawal from the Funds in normal circumstances :

Benefits on Withdrawal

<u>Length of Continuous Contributory service</u>	<u>Contributor's own contribution plus dividends declared thereon</u>	<u>Government's donation plus dividends declared thereon</u>
Less than 5 years	100%	Nil
Not less than 5 years) but less than 6 years)	100%	50%

Not less than 6 years) but less than 7 years)	100%	60%
Not less than 7 years) but less than 8 years)	100%	70%
Not less than 8 years) but less than 9 years)	100%	80%
Not less than 9 years) but less than 10 years)	100%	90%
Not less than 10 years	100%	100%

Operating Expenses Block Grant**Structure**

1. The Operating Expenses Block Grant (OEBG) covers various non-salary recurrent grants with the exception of grants disbursed on an actual claim or reimbursement basis. The Grant comprises a General Domain and a Special Domain as follows -

- (a) General Domain

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

- (b) Special Domain

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

2. The Permanent Secretary may review the rates, the grouping of the constituent grants and virement arrangement when required. Schools are advised to refer to the relevant circular currently in force.

Principles and rules on usage

3. 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).
4. 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.
5. In incurring expenditure, schools should observe the ambit of the constituent grants of the OEBG, as set out in the Code of Aid and in circulars issued by the Education Bureau from time to time. In addition, schools should ensure that the total spending should be kept within the amount of the OEBG, i.e. no topping up of the OEBG will be given.

6. Subsidy will continue to be provided for Provident Fund (PF) contributions in respect of clerical and janitor staff employed within the provision allocated for Administration Grant or the Revised Administration Grant. For staff employed with funds under other constituent grants of the OEBG, schools should meet the PF contributions with surplus funds under OEBG or their own funds.
7. On the basis of the principles and rules stated above, the following items of expenditure shall not be charged to the OEBG –
 - (a) fringe benefits for staff, including housing benefits, provision of food or food allowance, traveling 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. The Education Bureau will revise the list and inform schools of the changes as and when appropriate.

Rates of the OEBG

8. When first introduced in the 2000/01 school year, the OEBG had the rates set on the basis of the rates approved for the 1999/2000 school year. The OEBG rates will be revised annually in accordance with the movement of the Composite Consumer Price Index. The Education Bureau will also review the need to revise in real terms the rates of individual grants as and when required.

Surplus retention

9. To give schools greater flexibility, schools are allowed to retain surplus balance up to 12 months' provision of the OEBG. Applications for accumulation of surpluses in excess of 12 months' provision will only be considered in exceptional circumstances.
10. Schools should ascertain the surplus balances of grants under the General Domain and the Special Domain respectively. The surpluses should be totalled and if this total exceeds the 12 months' provision of the prevailing level of the OEBG, schools should return the excess to the Education Bureau.
11. When the surplus exceeds the 12 months' provision, schools are free to decide from which constituent grant the excess may be clawed back by the Education Bureau.

Expenditure Control and Accountability

12. 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. To cope with urgent or unforeseeable needs, schools may consider seeking delegation of the authority from SMCs for making changes to the budget up to a certain financial limit.
13. Schools should ensure that the total expenditure is kept within the amount of the OEBG. Any deficit will have to be met by the schools' own funds. Also, if expenditure is found improperly incurred or charged to the OEBG funds, the school should make good such expenditure by charging it to its own funds.

Accounting and Reporting Requirements

14. Schools should continue to maintain separate ledger accounts for each constituent grant of the 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 the OEBG.
15. Schools should submit audited annual accounts and such other financial statements in accordance with the format as required by the Education Bureau. 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 the Education Bureau from time to time.

Composite Furniture and Equipment Grant**Ambit**

1. The Composite Furniture and Equipment Grant (CFEG) will cover -
 - (a) Furniture & Equipment (F&E) items to meet the needs of schools and students;
 - (b) maintenance/repairs fees for F&E items; and
 - (c) 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.

Principles and Rules on Usage

2. The Composite Furniture and Equipment Grant (CFEG) provides schools with greater flexibility in the use of resources. 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 is able to cover all the expenditures.

Grant Rate

3. The rate will be adjusted annually in accordance with the movement of the Composite Consumer Price Index.

Procurement, Financial and Accounting Arrangements

4. Procurement and Financial Arrangements

Within the amount of CFEG available in school, there is no financial limit for F&E items to be purchased. Schools should adhere to the guidelines on tendering and purchasing procedures and any guidelines the Permanent Secretary may issue.

5. Accounting Arrangements

Schools should maintain a separate account named “Composite Furniture and Equipment Grant Account” to record the income and expenditure of the CFEG. The cost of the procured F&E should be captured in the Balance Sheet under the headings of “Fixed Assets for Furniture and Equipment” and “Composite Furniture and Equipment Grant Utilised”. In addition, schools are required to record the items procured in the Fixed Assets Register.

6. Expenditure Control

- (a) To ensure that the CFEG 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 funds and seek the approval of their SMCs of the budget and make the approved budget transparent to parents and teachers.

- (b) Schools should ensure that the total expenditure is kept within the amount of CFEG. Also, if any expenditure is found improperly incurred or charged to CFEG funds, the schools are required to make good such expenditure by non-government funds.

Accountability

- 7. Schools have to account for the proper utilization of the CFEG 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 CFEG; and
 - (e) making available the school report with a financial statement for parents and the Education Bureau.

Separate F&E Subsidy outside the CFEG

- 8. Separate F&E subsidy will continue to be provided to schools by the Education Bureau 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.)

Appendix 17 is relevant.

Non-Recurrent Grants (Furniture and Equipment)**Provision for furniture and equipment items not covered by the Composite Furniture and Equipment Grant (CFEG)**

1. Separate non-recurrent subsidy will be provided for furniture and equipment (F&E) items costing \$3,000 or above not covered by the CFEG for -
 - (a) School Administration and Management System;
 - (b) replacing standard F&E items lost in natural disaster, burglary, theft, fire etc;
 - (c) reprovisioning or redevelopment of and extension to an existing school administered under the terms of this Code of Aid; and
 - (d) new initiatives
2. Schools will be notified individually in writing by the responsible Section of the Education Bureau of the grant(s) that has / have been approved, the amount of provision and the due date for requesting the payment / reimbursement of the F&E subsidy. Schools should then proceed with the procurement exercise as soon as possible, following the procurement procedures in the prevailing circular(s) / circular memorandum(s) in force and the Guidelines on Procurement Procedures in Aided Schools available on the Education Bureau homepage.

(updated on 1 September 2016)

Principles of Procurement (also applicable for procurement charged to the CFEG)

3. For single purchases exceeding \$200,000, tenders from at least 5 suppliers should be obtained.
4. For single purchases not exceeding \$200,000, purchases may be arranged by obtaining two or more quotations (i.e. above \$5,000 to \$50,000, by at least two oral quotations and above \$50,000 to \$200,000, by at least five written quotations) with the lowest offer to specification being accepted. Where the total value of the purchase of any stores and services does not exceed \$5,000, schools are not required to conduct any competitive bidding, subject to minor purchase of stores and services being made to meet immediate needs and the school staff at the appropriate level being satisfied that such purchases are essential and his/her certifying that the prices are fair and reasonable and such records being properly kept by schools.

(updated on 1 November 2013)

Tender Opening and Vetting Committee (TOVC)

5. The Principal should appoint a TOVC at least 3 working days before the tender opening

date. The TOVC will be responsible for opening, vetting and referring tender documents to the appropriate subject teacher(s) and administrative staff for evaluation and recommendation before the tender documents are referred to the Tender Approving Committee for consideration.

6. A TOVC should comprise 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. *(updated on 1 November 2013)*

Approving Authorities for Procurement of Stores and Services

7. Purchases of stores and services not exceeding \$5,000 and oral quotations above \$5,000 to \$50,000 shall be approved by the Principal/Deputy Head. For schools without Deputy Head, the approving authority rests with the Principal.
8. Written quotations above \$50,000 to \$200,000 shall be approved by the Principal.
9. Tenders above \$200,000 shall be approved by a Tender Approving Committee comprising the School Supervisor/Manager, the Principal, a teacher and a representative of the Parent-Teacher Association or a parent manager.
10. The School Management Committee should ensure that –
 - (a) the procurement procedures laid down by the Education Bureau are complied with;
 - (b) the designated purpose(s) of each grant is/are met;
 - (c) proper records of the quotations and tenders are available for inspection by the Education Bureau; and
 - (d) a separate section on the set-up fund for furniture and equipment should be included in new schools' audited annual account with details by items and subjects.

(updated on 1 November 2013)

Payment Arrangements

11. The arrangements for payment of non-recurrent F&E subsidy to aided schools are as follows –
 - (a) After the award of a tender or purchase by quotation has been approved under the procurement procedures laid down by the Education Bureau, the school should apply on a prescribed form for payment. *(updated on 1 November 2013)*
 - (b) Receipts and invoices in respect of the purchases should be kept in the school for audit inspection purposes. The income and expenditure should be recorded separately in the Non-recurrent Grants for F&E Account for the individual projects. The F&E items purchased should be recorded in the Fixed Assets Register.
12. Schools should note that the payment of non-recurrent F&E subsidy is made on the following conditions –

- (a) where there is any subsequent reduction in tender price (e.g. through offer of discount for prompt payment) or the approved tender is for any reason cancelled, the school should inform the Bureau immediately in writing of the appropriate amount of subsidy to be refunded. The amount will be offset from other subsidies payable to the school;
- (b) where the award of the approved tender/quotation would result in the approved estimate being exceeded, the school should meet the difference between the cumulative expenditure and the approved estimate; and
- (c) payment will be subject to availability of funds. In the event that funds in the relevant vote are exhausted in the latter part of each financial year, e.g. from January to March, payment may be postponed until the next financial year.

Note: For payment of non-recurrent furniture and equipment subsidy to aided schools, schools are required to follow the procedures in the respective prevailing circular(s) / circular memorandum(s) in force. *(updated on 1 September 2016)*

Non-recurrent Grants (Major repairs and Projects of \$30 million and below)**Major Repairs Grants for items costing \$3,000 or above****I. For estate schools**

1. Requests for subsidy towards the cost of items in respect of internal / external / structural repair works costing \$3,000 or above must be submitted to the Education Bureau via the appropriate channel as detailed in the call circular issued annually to schools. The completed applications should reach the Education Bureau not later than the specified date each year.
2. In making their application of works, schools will have to specify the location and details of works to be done without giving the estimated costs and state the reasons why the work requests are needed.
3. Applications will be vetted by the term consultants appointed by the Education Bureau. The term consultants will conduct a technical vetting of schools' application, i.e. categorizing the work type, providing recommendations on the estimated costs and providing comments as necessary on the technical aspects of the works proposed by the schools to the Architectural Services Department (for external / structural repairs works) and Education Bureau (for internal repairs works) for consideration.
4. Subject to the availability of funds, the Education Bureau will inform schools of the approved projects.
5. For schools with approval given, the term consultants appointed by the Education Bureau will liaise with individual schools to arrange for the works programme.
6. Requests for subsidy in respect of major internal repairs which have not been included in the Estimates will not normally be considered unless they are of an emergency or unforeseen nature.
7. All repairs works will be carried out by maintenance term contractors supervised by the term consultants appointed by the Education Bureau.
8. For items involving works in a non-school portion, the school should state clearly when submitting the application. Normally, the term consultants will not be responsible for any works in non-school portion which is separately identifiable from the school portion. The term consultants will only undertake works in a non-school portion when it is inseparable from the school portion at which approved repair works are to be carried out. Prior to commencement of works in the non-school portion, the school is required to agree in writing the scope of works and to pay the necessary costs with an on-cost at prevailing rate charged for the works in the non-school portion.

Note

All School Management Committees, as building tenants, should be responsible for the safety and soundness of their buildings. The term consultant appointed by the Education Bureau, acting in its role as works agent, would be responsible only for the sufficiency of the

actual repair work projects undertaken by them.

(updated on 1 September 2016)

II. For non-estate schools

1. Requests for subsidy towards the cost of items in respect of internal / external / structural repair works costing \$3,000 or above must be submitted to the Education Bureau via the appropriate channel as detailed in the call circular issued annually to schools. The completed applications should reach the Education Bureau not later than the specified date.
2. In making their application of works, schools will have to specify the scope of works to be done without giving the estimated costs and state the reasons why the work requests are needed.
3. Applications will be vetted by the term consultants appointed by the Education Bureau. The term consultants will conduct a technical vetting of schools' application, i.e. categorizing the work type, providing recommendations on the estimated costs and providing comments as necessary on the technical aspects of the works proposed by the schools to the Education Bureau for consideration.
4. Subject to the availability of funds, the Education Bureau will inform schools of the approved projects.
5. For schools with approved projects costing \$2 million or below, the term consultants appointed by the Education Bureau will approach individual schools direct to discuss the details and arrange for the works programme. For approved projects of estimated cost exceeding \$2 million each, the professional officers of the Architectural Services Department will then approach individual schools to arrange for the works programme.
6. Requests for subsidy in respect of major repairs which have not been included in the Estimates will not normally be considered unless they are of an emergency or unforeseen nature.
7. For items involving works in a non-school portion, the school should state clearly when submitting the application. Normally, the term consultants / Architectural Services Department will not be responsible for any works in non-school portion which is separately identifiable from the school portion. The term consultants / Architectural Services Department will only undertake works in a non-school portion when it is separable from the school portion at which approved repair works are to be carried out. Prior to commencement of works in the non-school portion, the school is required to agree in writing the scope of work and to pay the necessary costs with an on-cost at prevailing rate charged for the works in the non-school portion.

(updated on 1 September 2016)

Deed of Covenant

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

-
- (a) That the premises will be used solely for approved educational purposes or other purposes approved by the Permanent Secretary.
 - (b) That the school will be managed in accordance with the Education Ordinance and its subsidiary legislation and the Code of Aid for Primary School.
 - (c) That if the sponsor should at any time desire to be released from the foregoing obligations, or if for any reason the school ceases to be accepted by the Permanent Secretary as an aided school, the sponsor may be required to repay the whole amount of grant to the Government or an equitable proportion of such grant as assessed by the Government.
 - (d) That in the event of any breach or non-performance of any of the terms, covenants and conditions contained in the Deed of Covenant, it shall be lawful for the Government to re-enter upon the lot and the school without the payment of any compensation whatsoever.

Notes on Grant for Capital Cost for Building
(for Projects exceeding \$30 million)**Procedures Concerning Application for the Non-recurrent Grant for Capital Cost for Building**

1. Subject to funding and policy, the Permanent Secretary may approve non-recurrent grant towards the capital cost for the extension or redevelopment of existing school premises. *(updated on 1 September 2016)*
2. The application for the grant for capital cost for building by the School Management Committee (the Applicant) should give full justification for the proposal, including the proposed scope, the estimated cost, and the amount the Applicant will contribute. In addition, the Applicant must state in its application whether it intends to carry out the project by private contract under government subvention. The Applicant should state whether a grant of site is required from the Government or whether the proposed project is to be built on land already available. For a proposed project on private land, the Applicant should check with the relevant District Lands Office that the lease conditions of the land will permit the proposed development. A statement regarding the land title, signed by the trustee or the legal representative of the grantee should be forwarded with the proposal to the Permanent Secretary for consideration. This statement should show the location, lot number of the areas to be used. All expenditure prior to notification in writing by the Permanent Secretary of the approval of the non-recurrent grant will be the sole liability of the Applicant. *(updated on 1 September 2016)*
3. Consideration and approval for non-recurrent grant is subject to the conditions set out by the Permanent Secretary. Funding consideration is subject to resource allocation and the Finance Committee of the Legislative Council. The proposed project should be carried out in accordance with the requirements of the prevailing subvention policy and conditions set out by the Permanent Secretary.
4. Non-subvented portion if required by the Applicant may be included in the project subject to approval by the Permanent Secretary even when the full cost required, including consultancy and construction, etc., for the non-subvented portion is borne by the Applicant. Such non-subvented portion and the related cost will not be eligible for recurrent or non-recurrent subsidy from the Government.
5. Subject to justification for the proposal, the Permanent Secretary will issue a project definition statement to the Works Agent for feasibility study and follow up action. The Permanent Secretary will issue the project definition statement direct to the Applicant opted to carry out the project under private contract. Under this self-delivery mode, the Applicant will be responsible for preparing a Technical Feasibility Statement for submission to the Education Bureau for comment and approval.
6. Upon written approval of the Technical Feasibility Statement and confirmation to proceed with the pre-tender works, the Applicant can obtain technical and fee proposals for architectural and associated consultancy services and quantity surveying consultancy services. Only registered consultants should be invited for tender and the invitation documents should be forwarded to the Permanent Secretary for comment.
7. The Applicant should submit recommendations for appointment of consultants to the Permanent Secretary for approval on the recommendations of Architectural Services

Department (ArchSD). The technical proposal and fee proposal are to be kept distinctly separated. Any opening of fee proposals prior to the Education Bureau/ArchSD examination of the technical marking will immediately invalidate the tender or disqualify the tender from subvention. The recommended technical and fee proposals should not be accepted until written approval is given by the Permanent Secretary. The Applicant should also submit tender documents for various pre-tender works like site investigation for approval before commissioning the contracts.

8. The Applicant should only proceed into the post-contract stage upon the written notification of the Finance Committee's funding approval. Prior to issue of tender for construction work, the Applicant should forward a list of proposed tenderers together with the draft tender documents for the ArchSD's comment and the Education Bureau's approval.
9. For post-contract works, a minimum of ten tenderers should be invited to tender. The Applicant should require the tenderers to deposit their tenders into the Public Works Tender Board's (PWTB) Tender Box. In this regard, the Applicant should give advance notice to the Secretary of the PWTB of the works and the tender closing date. The tender closing date and time must be set at noon on a Friday not being a public holiday. Upon receipt of tenders, the Applicant will be informed by PWTB for collection of tenders.
10. The Applicant should submit the tender recommendation to the Education Bureau for approval. It should be noted that without exceptionally valid justifications, the Applicant is required to accept the lowest complying tenders. The Applicant must not accept any tender unless there is prior approval from the Permanent Secretary. The school shall be liable for all the consequences of accepting tenders in excess of the approved project estimates without prior approval from the Education Bureau.
11. Any financial commitment accepted without the prior approval of the Permanent Secretary shall be the sole responsibility of the sponsor. After the Permanent Secretary has given approval for the recommended tender, the Applicant may arrange for the signing of the contract and the commencement of construction work in accordance with the terms of the contract. A copy of the signed contract should be submitted to the Permanent Secretary for record.
12. When a project is not fully financed through the capital subvention, the school should use up its agreed contribution or any other payment arrangement as referred to in the Letter of Approval (excluding contribution to provide furniture and equipment, if applicable) before requesting payment of the subvention. If the total tender price is higher than the estimated construction cost of the school as referred to in the Letter of Approval, the school should also absorb the difference according to the payment arrangement as stated in the Letter of Approval.
13. Where the new building or extension is to be erected on private land, the trustees or legal representatives of the sponsor must execute under seal and register by Memorial in the Lands Department a Deed of Covenant which shall contain such provisions as the Permanent Secretary may require, and shall in particular provide the following : -
 - (a) That the premises will be used solely for approved educational purposes or other purposes approved by the Permanent Secretary.
 - (b) That the school will be managed in accordance with the Education Ordinance and its subsidiary legislation and the Code of Aid for Primary Schools.

- (c) That if the sponsor should at any time desire to be released from the foregoing obligations, or if for any reason the school ceases to be accepted by the Permanent Secretary as an aided school, the sponsor may be required to repay the whole amount of grant to the Government or an equitable proportion of such grant as assessed by the Government.
 - (d) That in the event of any breach or non-performance of any of the terms, covenants and conditions contained in the Deed of Covenant, it shall be lawful for the Government to re-enter upon the lot and the school without the payment of any compensation whatsoever.
14. Payment of capital subvention to a school is subject to the conditions stated in the Letter of Approval issued by the Permanent Secretary to the school receiving the subvention. Interim payment of building grant may be requested after the agreed contribution of the school towards the building cost has been fully expended. Requests for payment by the Applicant must be supported by properly receipted bills and where an architect is employed, by the architect's certificate to the effect that the work for which payment is claimed, has been satisfactorily completed. Where circumstances justify e.g. the original receipts, invoices or certificates submitted are found not acceptable, the Permanent Secretary could cease to make payment of subvention to the school and the school shall repay partly or fully the subvention received if required by the Permanent Secretary.
 15. The final submission of original invoices and receipts for works should be made to the Permanent Secretary within the Period of Final Measurement as stated in the building contract (usually 12 months from the date of practical completion of the project). Under normal circumstances, the account of the project should be closed as soon as possible and in any event within three years from the handover of the completed school building.
 16. Current consultancy guidelines mandate Bills of Quantities. It should also be noted that all materials and workmanship for any works must be in accordance with the latest edition of the "General Specification for Buildings" published by the ArchSD.
 17. For projects of \$30 million and below please refer to Appendix 18. (*updated on 1 September 2016*)

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

School Assets and Settlement of Claims**(A) Procedures for Assessment and Settlement of Claims for Damage or Destruction of Standard Items Caused by Fire, Natural Disaster or Perils**

1. When there is a fire or natural disaster or an occurrence of the perils as described in section 42(a) in an aided school, the Supervisor/Head of the school, apart from reporting the incident immediately to the relevant government departments such as the Hong Kong Police Force and the Fire Services Department, must also report the matter immediately to the respective Senior School Development Officer who will arrange a joint inspection with the Senior Supplies Officer of the Education Bureau and officers of other relevant government departments such as the Architectural Services Department, Water Supplies Department etc. to conduct a preliminary investigation at the earliest opportunity. The purpose of the visit is to identify the extent of damage caused. In the case of fire, a report from the Fire Services Department on the incident will also be necessary.
2. Based on the report of the school, the estimated cost of replacement of furniture and equipment and repairs to the school premises will be assessed, which will form the basis for determining the amount of subsidy to be paid to the school by the Government.
3. The full cost of damage or loss caused by fire or natural disasters or resulting from the described perils in Section 42(a) will be paid to schools on the basis of the approved tendered cost or the actual cost, whichever is lower.
4. Once the amount of subsidy is determined and approved, the school authority will be advised to proceed with the purchase of furniture and equipment for replacement in accordance with the standard tendering procedures. As regards the damage to school buildings, all repairs will be treated as emergency repairs and the standard procedures as stipulated in Appendix 18 should be followed.

(B) Procedures for Assessment and Settlement of Claims for Losses of Standard Furniture and Equipment Caused by Theft and Burglary

5. When there is a loss of standard items in an aided school, the Supervisor/Head of the school must report the loss immediately to the nearest police station of the Hong Kong Police Force and make a preliminary report to the respective Senior School Development Officer who will arrange a joint inspection with the Senior Supplies Officer of the Education Bureau to conduct a preliminary investigation at the earliest opportunity. The purpose of the visit is to identify any security problems. An investigation report from the Hong Kong Police Force on the incident will be required.
6. The Supervisor/Head of the aided school will then proceed to investigate the loss fully and as soon as practicable, forward his detailed report with the following information, together with copies of other relevant documents, e.g. police reports, to the respective Senior School Development Officer as appropriate:-
 - (a) details of the occurrence, including date, time, detailed description and cost (original/replacement) of furniture/equipment found lost;

- (b) progress of internal investigation; and
 - (c) recommendations for clearing the loss and any action considered necessary to prevent a similar occurrence.
7. Supervisor/Head of school is required to certify in each case that no fraud, suspected fraud, negligence or violation of an important point of principle is involved.
 8. Based on the reports of the school and the result of investigation by the Police and officers concerned, the estimated cost of replacement of furniture and equipment lost will be assessed, with the recommendation by the relevant officer, which will form the basis for determining the amount of subsidy to be paid to the school by the Government.
 9. The full cost of loss will be paid to schools on the basis of the approved tendered cost or the actual cost, whichever is lower.
 10. However, once the amount of subsidy is determined and approved, the school authority will be advised to proceed with the purchase of furniture and equipment for replacement in accordance with the standard tendering procedures.

Security Measures

11. Supervisors of aided schools should take necessary security measures to protect the schools' assets against all perils mentioned above. Special attention should be paid to security measures against theft, burglary or robbery, particularly for movable assets such as cash and equipment.
12. Supervisors are reminded that petty cash (Government portion and school portion, if any) kept in schools should not exceed the limits prescribed in the Circular currently in force. In case there is a claim of loss in petty cash caused by the aforesaid perils, the amount of claim should be the actual amount lost or the prescribed limit, whichever is lower. It is also advisable that collections and payments should be made through bank accounts as far as possible to minimise the risk of cash losses. Cash collections, if any, should be banked as soon as practicable to reduce the risk of keeping or transporting cash in large sums.
13. When it is necessary to transport cash, the following security measures are suggested :-
 - (a) If the amount exceeds \$5,000 but is less than \$10,000, two persons are required to escort the cash.
 - (b) If the amount exceeds \$10,000, commercial security guards should be hired.

INDEX

<u>TOPIC</u>	<u>SECTION (S)/APPENDIX (A)</u>
Accepting donations	S.17
Accounts of private section	S.72
Accounts, school	S.65-S.68
Administration Grant/Revised Administration Grant	S.20, A.2B
Administrative Guide	A.1
Admission, pupils	S.43, A.1
Allowances	A.3
Allowance, special education	A.4/Attachment A
Appointment, additional managers	S.4
Appointment, additional posts for specialised teaching	A.2A
Appointment, clerical staff	S.33, A.5/Attachment L
Appointment, educational psychologists	S.50-S.53, A.2A, A.5/Attachment J-K
Appointment, head	S.50(a), A.5/Attachments A-C
Appointment, janitor staff	S.20, A.2B
Appointment, primary school curriculum leader	A.2A
Appointment, senior teacher post of English	A.2A, A.6
Appointment, teacher librarian	A.2A
Appointment, teaching staff	S.50-S.54, A.2A, A.5/Attachment A-I
Audited accounts, submission	S.69-S.70
Block Insurance Policy	S.42
Building Grants	A.19
Calculation of Administration Grant/Revised Administration Grant	A.2B
Calculation of Salaries Grant	S.19
Charging Subscriptions (Tong Fai)	S.14(a)
Chest X-ray examination	S.51
Class structure	S.12(b)
Clerical staff, appointment	S.20, S.33, A.2B
Collection of Subscriptions (Tong Fai)	S.15
Composite Furniture and Equipment Grant	S.8(a), S.37, A.16
Conditions for promotion	S.59-S.60, A.6
Conditions of appointment, clerical staff	A.2B, A.5/Attachment L
Contract of service, teaching staff	S.55
Curriculum and Time-table	A.1
Damage, settlement of claims	S.42, A.20
Dismissal, teaching staff	S.57(g), A.7-A.8
Dismissal/termination of appointment of a teacher	S.57, A.7-A.8
Donations, acceptance	S.17
Educational psychologists, appointment	S.50-S.53, A.2A, A.5/Attachment J-K
Educational psychologists, chest X-ray examination	S.51
Educational psychologists, increments for experience	S.25
Educational psychologists, maternity leave	S.26(a), A.11
Educational psychologists, medical examination	S.51
Educational psychologists, no-pay leave	S.28
Educational psychologists, paid annual leave	S.34(a), A.12A
Educational psychologists, paid leave to serve as jurors	S.26(b)
Educational psychologists, paid study leave	S.27
Educational psychologists, paternity leave	S.26(a), S.34(e), A.10
Educational psychologists, promotion	S.60, A.5/Attachment J-K, A.6

Educational psychologists, qualifications for appointment	S.53, A.5/Attachment J-K
Educational psychologists, retirement	S.58(a-b)
Educational psychologists, Salaries Grant	S.19
Educational psychologists, salary scales	A.3
Educational psychologists, sick leave	S.26(a), A.10
Educational psychologists, special tuberculosis leave	S.26(a), A.10
Employment, supply teachers	S.31, A.3
Employment, temporary clerk	S.34(d)
Employment, temporary replacements	S.32
Expansion of aided schools	S.12(a)
Expenditure of school income	S.16
Fees	S.13-S.14
Furniture & Equipment, tender	A.17
Furniture & Equipment, non-recurrent grants	A.17
Grants	S.7-S.8
Head, appointment	S.50(a), A.5/Attachments A-C
Head, paid study leave	S.30
Increments for experience	S.24-S.25
Initial grant for school-based psychological service	S.39(b)
Insurance	S.42
Janitor staff, appointment	S.20, A.2B
Letting of premises	S.18
Major Repairs, non-recurrent grants	A.18
Maternity leave, clerical staff paid out of Salaries Grant	S.34(c), A.13
Maternity leave, educational psychologists, teachers	S.26(a), A.11
Medical examination, educational psychologists, teachers	S.51
No-pay leave, educational psychologists, teachers	S.28
Non-recurrent and Capital Grants	S.8(b), S.39-S.40, A.17, A.18, A.19
Non-teaching staff, Provident Fund	S.64
Notice on termination of service, teaching staff	S.57(a-e)
Operating Expenses Block Grant	S.8(a), S.36, A.15
Outside duties	S.62
Paid annual leave, clerical staff paid out of Salaries Grant	S.34(a), A.12B
Paid annual leave, educational psychologists	S.34(a), A.12A
Paid study leave, head	S.30
Paid study leave, educational psychologists, teachers	S.27
Paid sick leave, clerical staff paid out of Salaries Grant	S.34(b)
Payment of Salaries	S.22-S.23, A.9
Payment of Salaries Grant	S.19
Premises, letting	S.18
Primary School Master/Mistress Grade Structure	A.2A
Private section, accounts	S.72
Probationary period, teachers	S.56
Procedures, Non-recurrent and Capital Grants	S.39(a)-S.40, A.17, A.18, A.19
Promotion, educational psychologists	S.60, A.5/Attachment J-K, A.6
Promotion, teachers	S.59, A.5-A.6
Provident Fund, non-teaching staff	S.64
Provident Fund, teachers	S.63, A.14
Pupils, admission	S.43, A.1
Pupils, suspension and expulsion	S.45, A.1
Qualifications for appointment, educational psychologists	S.53, A.5/Attachment J-K
Qualifications for appointment, teachers	S.53, A.5/Attachment A-I
Recurrent Grants	S.8(a)

Reduction of Grants	S.10
Refund of Grants	S.10(c), S.11, S.73
Regrading of staff	S.59
Rent and Rates Grant	S.38
Resignation, teachers	S.57(d-e)
Retirement, clerical staff paid out of salaries grant	S.58(c)
Retirement, educational psychologists, teachers	S.58(a-b)
Revised Administration Grant/Administration Grant	S.20, A.2B
Salaries Grant	S.19
Salaries, payment	S.22-S.23, A.9
Salary Scales and Allowances	A.3
School Accounts	S.65-S.68
School premises, use	S.48
Senior Teacher Post of English	A.2A, A.6
Settlement of claims, damage	S.42, A.20
Sick leave, educational psychologists, teachers	S.26(a), A.10
Special Education Programme	A.4
Special tuberculosis leave, educational psychologists, teachers	S.26(a), A.10
Special leave, paid	S.29
Staff establishment	S.21, A.2
Storms and heavy persistent rain	A.1
Submission of audited accounts	S.69-S.70
Subscriptions (Tong Fai), charge	S.14(a)
Subscriptions (Tong Fai), collection	S.15
Subscriptions (Tong Fai), transfer	S.14(b), S.71
Subsidized Schools Provident fund	S.63, A.14
Supply teachers, employment	S.31, A.3
Suspension and expulsion, pupils	S.45, A.1
Suspension, teachers	S.57(f)
Teaching practice arrangements	S.47
Teaching staff, appointment	S.50-S.54
Teaching staff, chest X-ray examination	S.51
Teaching staff, contract of service	S.55
Teaching staff, dismissal	S.57(g), A.7-A.8
Teaching staff, increments for experience	S.24
Teaching staff, maternity leave	S.26(a), A.11
Teaching staff, medical examination	S.51
Teaching staff, no-pay leave	S.28
Teaching staff, notice on termination of service	S.57(a-e)
Teaching staff, outside duties	S.62
Teaching staff, paid leave to serve as jurors	S.26(b)
Teaching staff, paid study leave	S.27
Teaching staff, paternity leave	S.26(a), A.10
Teaching staff, probationary period	S.56
Teaching staff, promotion	S.59-S.60, A.5-A.6
Teaching staff, Provident Fund	S.63, A.14
Teaching staff, qualifications for appointment	S.53, A.5/Attachment A-I
Teaching staff, retirement	S.58(a-b)
Teaching staff, sick leave	S.26(a), A.10
Teaching staff, special leave with pay	S.29
Teaching staff, special tuberculosis leave	S.26(a), A.10
Teaching staff, suspension	S.57(f)
Temporary clerk, employment	S.34(d)

Temporary replacements	S.32
Tender, Furniture & Equipment	A.17
Transfer of Subscriptions (Tong Fai)	S.14(b), S.71
Unqualified teacher, employment	S.54
Use of school premises	S.48
Withdrawal of Grants	S.10

Note: S – Section(s)
 A – Appendix/Appendices