

Education Bureau Circular No.6/2014

From: Permanent Secretary for Education	To: Supervisors / Heads of all aided (including special schools), government, caput and Direct Subsidy Scheme (DSS) schools operating senior secondary levels for action
Ref.: EDB(CG)IS/15	
Date: 9 May 2014	

Career and Life Planning Grant

SUMMARY

This circular sets out the details of the Career and Life Planning (CLP) Grant which aims to strengthen life planning education and career guidance in public sector schools and DSS schools with senior secondary level classes.

BACKGROUND

2. In the face of the unprecedented pace of changes worldwide with the advent of information technology and explosive growth of knowledge, our education system aims to better prepare students in making informed and responsible choices so that they would be able to make the best of the opportunities ahead. With the implementation of the new senior secondary (NSS) curriculum and the diversified articulation to different pathways for lifelong learning, the senior secondary stage denotes a key transition between secondary schooling and post-secondary / vocational education and career development. Upon completion of senior secondary education, irrespective of the pathway that a student may choose, he / she will face an environment markedly different from school life and hence, it is of utmost importance to provide students with enhanced life-planning and career guidance support.

3. To strengthen support for the younger generation to pursue their interests and realise their potentials, the Chief Executive in his Policy Address 2014 announced, inter-alia, that starting from the 2014/15 school year, public sector schools operating classes at senior secondary levels will be provided with an additional annual recurrent cash grant to enhance and enrich life planning education elements for students.

DETAILS

What to achieve through life planning education

4. Life planning is an ongoing and lifelong process for personal fulfillment,

with different foci at different stages of one's life. Life planning education plays a significant role at school in fostering students' self-understanding, personal planning, goal setting, reflective thinking and articulation to progression pathways. Hence, life planning education is not merely a remedial or advisory service for students when they need to make subject or career choices. Effective life planning education and career guidance should be integrated with the school's curriculum, through which students are equipped with the knowledge, skills and attitude to make wise choices in accordance with their interests, abilities and orientations as well as connecting their career/academic aspirations with whole-person development and life-long learning.

Career and Life Planning Grant

5. The CLP Grant to be released to the eligible schools starting from the 2014/15 school year is a recurrent provision¹ which will be revised annually in line with the adjustment to the mid-point salary of the Graduate Master pay scale. Career guidance is not new to schools and different schools may have adopted different ways in providing life planning service to students. Irrespective of the approaches, a common element of effective life planning education must be teachers' awareness of their role as "significant adults" to guide students in their quest for self-understanding as well as their readiness to support students in their self-actualisation and potential-realisation process based on that self-understanding. Considering the diversity of students' aptitudes and teachers' knowledge of the world outside the school, life planning education and career guidance cannot be the responsibility of just one or a handful of teachers. A team, and preferably a whole-school approach is needed. The prime aim of providing the additional cash grant is to empower and enhance the capacity of the teaching team involved in providing support in career guidance service and life planning education for students. Specifically, the teaching team needs to be empowered to embrace a paradigm shift from career information dissemination to embodying the essence of life planning education in a more co-ordinated and systematic manner. In addition, schools have to enrich the contents and expand the scope of their existing level of career guidance service so as to help students understand their own capabilities, career/academic aspiration, develop positive attitude towards work and learning and integrate their career/academic aspirations with whole-person development and life-long learning.

Utilisation of the Grant

6. The CLP Grant aims to enhance the capacity of schools and their

¹ The provision of the recurrent grant is benchmarked to Graduate Master's mid-point salary which is \$494,340 per annum at the 2013 salary level.

responsible teaching team so as to take forward comprehensive life planning education and career guidance service. To ensure that the recurrent grant is purposefully utilised to achieve the intended objectives, schools should designate their career master / mistress to lead the paradigm shift towards a holistic approach to life planning education and career guidance, to support the Incorporated Management Committee (IMC) / School Management Committee (SMC) in formulating school-based planning and strategy contributing towards effective life planning education for students; and to act as the school co-ordinator of the guidance service. The CLP Grant should primarily be used for its major purpose of empowering and enhancing the capacity of the teaching team for life planning education. Where circumstances allow, schools may then use the remainder of the grant to enrich relevant school-based service for students by providing career-related learning beyond the classroom. Such service may include financing needy students' participation in career exploration; engaging experts, business sector and alumni in related sharing with students; acquiring services to cater for the different career guidance needs of students with a particular background; and other services relevant to life planning education.

Evaluation and Accountability

7. To support schools to take forward the paradigm shift from career information dissemination towards life planning education for students, a planning guide on life planning education and career guidance has been uploaded at the website www.edb.gov.hk/cgs for schools' reference. Since life planning education is developmental in nature, the EDB will further update and revise the planning guide based on schools' practices and experiences as and when necessary.

8. In planning for the school-based career guidance service, schools are advised to make reference to the School Development and Accountability (SDA) Framework² that they are already familiar with, and the cyclic process of "Planning – Implementation – Evaluation (PIE)" for sustainable development. A policy statement endorsed by the IMC/SMC reflecting school's shared commitment towards a more coordinated and systemic approach will be instrumental in guiding the planning, implementation and evaluation of life planning education for students. Schools may refer to the six principles recommended in the planning guide on life planning education and career guidance. In line with the spirit of school-based management, the IMC/SMC of the school is accountable for proper use of cash grant for its intended objectives. To enhance transparency, the work plan and details on

² Education Bureau. [School Development and Accountability webpage](#).

the use of the CLP Grant should be endorsed by IMC/SMC and uploaded onto the school's homepage by December each year. A template for the work plan and report is at Appendix 1. At the current stage where life planning education is undergoing significant development in response to the increasing expectations of the students' capabilities and capacity to plan and make informed choices for their future, it is strongly recommended that IMC/SMC considers inclusion of life planning education as one of the major concerns in the School Development Plan, and monitor as well as evaluate its implementation through the school annual plan and school report. These working documents serving the needs of schools will also facilitate professional discourse during consultancy visits by the EDB's career guidance team.

Accounting and other related arrangements

9. The CLP Grant should not be deployed for purposes other than those set out in paragraph 6. Also, the CLP Grant is separate from the Expanded Operating Expenses Block Grant (EOEBG) / Operating Expenses Block Grant (OEBG). If a deficit is incurred on the CLP Grant in any year, aided schools may deploy the surplus under EOEBG or the General Domain of OEBG to top up the deficit of the CLP Grant while government schools may deploy the surplus of the Expanded Subject and Curriculum Block Grant to cover the deficit. Any remaining deficit balance not covered in that year should be met by schools' own funds.

10. For accounting and auditing purposes, aided and caput schools are required to keep a separate ledger account for the CLP Grant to record all the incomes and expenditures chargeable to the grant. Government schools will be allocated with a designated user code for capturing the provision of the CLP Grant and the expenditure thereon. Besides, schools should refer to relevant Education Bureau (EDB) Circulars and guidelines as appropriate in handling matters such as recruitment, hire of services, procurement of goods and services, etc.

Disbursement

11. For aided schools (including special schools) and caput schools, the CLP Grant will be allocated on a yearly basis in September. For government schools, the grant will be allocated in the form of budget allocations at two points in September and April of the school year; separate allocation for the unspent balance (if any) of the preceding financial year will be provided at the beginning of the next financial year. For DSS schools, the provision under the CLP Grant will be provided through the DSS unit subsidy.

Surplus Retention and Claw Back Arrangement

12. As CLP Grant is a recurrent cash grant, schools are required to optimise its use for the respective school years to make the most of it for each cohort of students. Hence, schools are not expected to retain surplus of this grant in principle. However, we note that for cashflow reasons and/or under exceptional and unforeseen circumstances, some schools might have cogent reasons for failing to fully utilise their funding within the school / financial year. We thus allow schools to retain a reasonable amount of unspent balance in a school / financial year and carry it forward for use in the subsequent year as detailed in the paragraphs below.

13. For aided and caput schools, we allow schools to retain the unspent balance of the CLP Grant up to 20% of the total provision disbursed for each year and to carry it forward for use in the next school year. EDB will claw back any amount in excess of the said cap based on schools' annual audited accounts. Schools are required to keep separate ledger accounts to record all the incomes and expenditures chargeable to the CLP Grant. Transfer of funds out of this cash grant is not allowed.

14. Government schools will enjoy the same arrangement as for aided and caput schools above, except that they will be accounted for on a financial year basis and any unspent balance in excess of the cap will lapse at the end of the relevant financial year. Transfer of funds out of this cash grant is not allowed.

15. The provision of the CLP Grant is subject to the passage of the 2014-15 Appropriation Bill by the Legislative Council.

Professional Support for Life Planning Education and Career Guidance

16. Schools are encouraged to make arrangements to release teachers concerned to attend relevant professional development courses and participate in seminars / talks / workshops in relation to their work for professional enhancement. EDB in partnership with secondary schools will work towards the objective of having at least two teachers who have completed structured training on life planning education and / or career guidance offered by EDB or equivalent in the next three years. EDB will keep track of the progress of professional training for continuous improvement. Details of the training courses and application would be uploaded onto the Training Calendar (<http://tcs.edb.gov.hk>) when available.

17. To enhance support services for schools, the Career Guidance Section of EDB will be implementing the following:

- a) [career guidance website](http://www.edb.gov.hk/cgs) (www.edb.gov.hk/cgs) will be revamped to provide more client-focused information to teachers, parents and students;
- b) apart from the EDB commissioned programmes, Professional Development Schools would be identified to disseminate good practices, and thematic seminars and workshops be organised to provide a platform for professional interflow among the school personnel and other stakeholders /organisations / set-up such as Qualifications Framework (QF);
- c) partnership with the QF Secretariat would be established to conduct different activities which aim to enable secondary students / teachers to understand how the QF can facilitate students' planning of further study and careers;
- d) a guide to facilitate schools in planning, implementing and evaluating their school-based life planning education and career guidance service has been developed and uploaded on the [EDB website](http://www.edb.gov.hk/cgs) (www.edb.gov.hk/cgs);
- e) workplace schemes will be launched and Business School Partnership Programme (BSPP) will be enhanced to provide experiential learning and opportunities for students to expand their horizons beyond Hong Kong. Details of the schemes will be announced via EDB circular / the [EDB website on BSPP](http://www.edb.gov.hk/bspp)(www.edb.gov.hk/bspp), when available;
- f) thematic career and parent talks will be conducted to keep students and parents abreast of the latest information on further studies, vocational training, career opportunities, trend of the working world, introductions to different industries and professions, etc.; and
- g) consultancy school visits will be conducted to give on-site advice on life planning education in the school context.

Briefing Sessions

18. The Career Guidance Section of EDB will introduce the CLP Grant at three identical briefing sessions to be held on 13 May 2014, 19 May 2014 and 29 May 2014. All schools are invited to attend one of the above sessions and the recommended attendees are school principals / vice-principals together with one or two teachers. For details and enrolment of the briefing sessions, please refer to the Training Calendars on the EDB website (Course ID: SCHD20140115).

ENQUIRIES

19. For enquiries, please contact your School Development Officer.

Tony TANG
for Permanent Secretary for Education

c.c. Heads of Sections – for information

(Template)

**Work Plan/Report on Life Planning Education
and Career Guidance Service**

This is a proposed framework for planning, monitoring and evaluation purposes. Schools are free to adopt the format to suit specific needs.

Name of school: _____

School Year: _____

Objectives: e.g.	Strategies: e.g.	Monitoring/Evaluation: e.g. (both quantitative and qualitative)	Allocation of the CLP Grant: e.g.
<ul style="list-style-type: none"> ● <i>What is the current state of life planning education and career guidance service?</i> ● <i>Where does the school plan to go?</i> <p>(Please indicate the specific objectives to be achieved, having regard to school context factors.)</p>	<ul style="list-style-type: none"> ● <i>How to achieve the objectives set?</i> ● <i>What is the professional development plan?</i> ● <i>What are the key activities for students and for parents?</i> <p>(Please indicate the details of the relevant plans.)</p>	<ul style="list-style-type: none"> ● <i>How good are the programmes/ activities/events to address the diversified needs of students?</i> ● <i>How do we know their effectiveness?</i> ● <i>How will the evaluation results be shown?</i> <p>(Schools may make reference to the attachment of Appendix 1 for reflective questions.)</p>	<ul style="list-style-type: none"> ● <i>For employment of staff (e.g.)</i> ● <i>For school-based programmes. (e.g.)</i> <p>(Please indicate areas of expenditure of the CLP Grant.)</p>

Reference Information for Facilitating Schools' Self-evaluation on Life Planning Education and Career Guidance Service

Below are some suggested items that school personnel may look for when evaluating the work plan on life planning education and career guidance:

1. Can activities/programmes facilitate students' understanding of their abilities, interests as well as career aspirations with appropriate means and tools, and formulation of individualised plan?
2. Are there any programmes to cater for the different career guidance needs of students with specific background (e.g. gifted, special education needs, non-Chinese, etc.)?
3. Are multifarious kinds of career guidance related programmes / activities arranged to suit diversified needs of students, such as local and overseas opportunities for further studies, latest development in the career world, different work place experiences, etc.?
4. Are different dimensions of intervention ranging from individualised guidance / support, small group activities to large-scale activities provided to address the needs of students at different development stages?
5. Do the target groups of the career guidance related programmes / activities cover students with different abilities and at developmental stages and where appropriate their parent?
6. Do students make use of a range of information sources (e.g. requirements and procedures to pursue further studies, the Qualifications Framework (QF), job search materials, etc.) and devise practical plans to equip themselves?
7. Is the role of the Qualifications Framework featured in the programmes / activities where appropriate by, for example, making use of the connections and networks established by the Industry Training Advisory Committees set up under the QF and the competency standards and progression pathways developed for the respective industries?
8. Is life planning and career guidance connected with other curriculum components to avoid overlaps and repetitions of goals?
9. Is quantitative and qualitative feedback from various stakeholders including teachers, students and parents collected to gauge the effectiveness of life planning education programmes/ activities?