

15 June 2018

Education Bureau Circular No. 9/2018
Grant for the Sister School Scheme

[Note: This circular should be read by

- (i) Supervisors and Heads of all Government, Aided (including special schools), Caput and Direct Subsidy Scheme (DSS) Schools – for action; and
- (ii) Heads of Sections – for information.]

Summary

The purpose of this circular is to invite schools to apply for the Grant for the Sister School Scheme.

Background

2. The Sister School Scheme, launched since 2004, has served as a platform for professional interflows and cooperation for Hong Kong primary, secondary and special schools. It has also facilitated schools to organise exchange activities with their sister schools in the Mainland at various levels based on their development needs. To promote Hong Kong-Mainland sister school exchanges, the Education Bureau (EDB) has launched a three-year Pilot Scheme on Promoting Interflows between Sister Schools in Hong Kong and the Mainland (the Pilot Scheme) with effect from the 2015/16 school year, through which financial and professional support have been provided to public sector¹ and DSS schools that have formed sister schools with their counterparts in the Mainland. Schools show good response and in general are positive to the Pilot Scheme. They consider that it helps teachers and students to have a better understanding about education in the Mainland, facilitates cultural interflows, expands schools' network, enhances teachers' professionalism and broadens students' horizons.

¹ Public sector schools comprise government, aided and caput schools.

As of today, more than 640 local primary, secondary and special schools have formed sister schools with their counterparts in various Mainland provinces and cities either through the coordination of the EDB or on their own initiative.

Details

3. To further promote the continuous and multi-faceted development of sister school activities, EDB will regularise the Pilot Scheme with effect from the 2018/19 school year, through which recurrent grant and professional support will be provided to public sector and DSS schools (including special schools) that have formed sister schools with their counterparts in the Mainland so that they can plan long-term sister school exchange activities to enrich students' learning experiences and foster teachers' professional development. Such measure can promote the sustainable development of schools.

4. Through the provision of recurrent grant, we expect to further strengthen our support to local schools so that they can better plan and conduct sister school exchange activities, to encourage more local schools to form sister schools with their counterparts in the Mainland and to enhance both the quality and quantity of sister school exchange activities. Schools can make use of the grant to arrange exchange activities (such as school visits, student activities, seminars, lesson demonstration, lesson evaluation, video conferencing and experience sharing) and decide such details as contents, modes, number of participants, frequency, dates and destinations of exchange activities with their sister schools in light of their development needs at the student, teacher and school management levels etc. They may also establish networks with other sister schools to expand the modes and enhance the effectiveness of exchange activities. Through exchanging ideas and sharing experience of management arrangements, the school management of local schools and their Mainland counterparts can enhance their management standard. Through activities like lesson observation, lesson evaluation and teaching demonstration etc., teachers can learn from each other good teaching ideas and methodologies, share teaching experience, foster curriculum planning and enhance professionalism. Through sister school visits and participating in other cultural, arts and sports activities etc., not only can students enhance their friendship, but also broaden their horizons and deepen their understanding of the Mainland/Hong Kong. Schools should adhere to the principles stipulated in EDB's "Guidelines on Study Tours outside Hong Kong" when arranging and conducting sister school exchange activities in the Mainland.

5. Apart from the provision of financial resources, EDB will commission service provider(s) to provide schools with professional support, including organising various exchange activities on different themes and sharing sessions, offering advice on exchange activities, facilitating schools to organise exchange activities, collecting and disseminating good practices, etc. Besides, EDB has set up the Electronic Platform for Sister Schools and will create a user account for each participating school, so that schools can easily exchange their experience and information beyond distance. Participating schools will be informed of relevant details at a later stage.

Eligibility

6. Local public sector and DSS primary, secondary and special schools having formed sister schools with their counterparts in the Mainland, either through the coordination of EDB or on their own initiative, are eligible to apply. Generally speaking, as school management, curriculum, student profile, etc. vary among primary, secondary and special schools, schools in Hong Kong and their counterparts in the Mainland should be of the same level (i.e. primary, secondary or special school), so that the objectives of the exchange can be achieved effectively.

7. Local schools that have not formed sister schools yet but wish to do so through the coordination of EDB can also apply. EDB will assist these local schools in pairing up with their counterparts in the Mainland with reference to their preferences. Schools may also pair up with their Mainland counterparts as sister schools on their own initiative. Nevertheless, these schools can only apply for the grant after they have formed sister schools. Please note that the grant (in general calculated from the date of pairing up) will only be disbursed to such schools in subsequent September or April after they have paired up with their Mainland counterparts as sister schools.

Amount of Grant

8. EDB will provide each participating school with recurrent grant (the amount of the recurrent grant for the 2018/19 school year is \$150,000) and professional support. The amount of grant will be adjusted in accordance with the movement of the Composite Consumer Price Index each year.

Usage of Grant

9. Schools may use the grant to arrange different modes of exchange activities having regard to their specific circumstances. As the grant is a designated funding, schools shall use the grant to meet the expenses of sister school exchange activities and relevant support relating to the objectives mentioned in paragraph 4. **Schools should make use of other grants/resources to cover the expenses not related to sister school exchange activities.** If found inadequate, schools may use the grant in tandem with other government funding, including the surplus under the Operating Expenses Block Grant (OEBG)/Expanded Operating Expenses Block Grant (EOEBG) (for aided schools), DSS Subsidy (for DSS schools) and fee subsidy (for caput secondary schools). Any deficit should be met by schools' own fund/non-government fund. Government schools may deploy the surplus of the Expanded Subject and Curriculum Block Grant (ESCBG) to cover the deficit if required. Points to note regarding the usage of the grant are at **Annex 1**.

Funding Disbursement Arrangements

10. The grant is separate from OEBG or EOEBG and will be disbursed with effect from the 2018/19 school year. For aided schools, caput and DSS schools, the recurrent grant will be allocated at two points in the school year (i.e. in September and April). For government schools, the grant will be allocated in the form of budget allocations at two points in the school year (i.e. in September and April); separate allocation for the unspent balance (if any) of the preceding financial year will be provided at the beginning of the next financial year.

Accounting Arrangements

11. Schools will be required to observe the established principles and requirements on the use of public funds as promulgated by EDB when using the grant. These include, among others, procurement of stores/services according to fair and transparent procedures, preparation of a separate ledger for proper recording of accounting transactions. Aided, caput and DSS schools are required to keep a separate ledger account to record all the incomes and expenditures chargeable to the grant and submit the annual audited accounts to EDB for examination in accordance with the existing requirements. Transfer of funds out of this grant is not allowed. For government schools, the recurrent grant will be provided in the form of budget allocation and should be charged to the user code assigned. The grant is financial year-based and the expenditure could not exceed the allocation in the respective financial year. Schools are also

required to pay attention to the prevailing ordinances, regulations and circulars related to procurement of outside services and handling of accounts, etc. Transfer of funds out of this grant is not allowed.

Surplus Retention and Claw back Arrangements

12. Since the grant is a recurrent grant, schools are required to optimise its use for the respective school year. Hence, schools are, in principle, not expected to retain surplus of this grant. Nevertheless, we understand that the sister school activities are organised by both Hong Kong and Mainland schools and some schools may have cogent reasons for not following the original plan to use their funding within the school/financial year under unforeseen circumstances. 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, DSS and caput schools, we allow schools to retain a maximum amount of unspent balance of up to twelve (12) months' provision of the grant. EDB will claw back any amount in excess of the said cap based on schools' annual audited accounts. Transfer of funds/ unspent balance out of this grant is not allowed.

14. Government schools will basically have the same arrangement as for aided, DSS and caput schools, 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.

Accountability

15. In line with the "School Development and Accountability Framework", the Incorporated Management Committee (IMC)/ School Management Committee (SMC) of the school is accountable for the proper use of the recurrent grant for its intended objectives. Schools are required to prepare a Plan on Sister School Exchanges which is to be **incorporated in the Annual School Plan** for endorsement by their IMC/SMC, setting out the objectives and the outline of the sister school exchanges and the arrangement of the grant usage in each school year. Exchanges should, in principle, be carried out without affecting regular teaching and school activities. Schools should also report the details of the sister school exchanges held and the financial report **in the School Report** for submission and endorsement by their IMC/SMC. Schools are **not** required to submit the Plan and Report on Sister School Exchanges to EDB.

However, schools are required to upload the **Annual School Plan and School Report** (which consists of the Plan and Report on Sister School Exchanges respectively) endorsed by their IMC/SMC onto the homepage of the school for the sake of enhancing transparency and in accordance with the established practice. Please refer to **Annex 2** and **Annex 3** for the templates of the Plan and Report on Sister School Exchanges respectively.

Application Procedures

16. Schools intending to apply for the recurrent grant should complete the **Recurrent Grant Application Form (Annex 4)**. Should schools

- have joined the Sister School Scheme and/or the Pilot Scheme and paired up with more Mainland sister schools on their own initiative subsequently, please also complete the **Reporting Form on Mainland Sister Schools (Annex 5)** together with **copies of relevant supporting documents** (only applicable to those sister school pairs **not reported** to EDB before)
- have joined neither the Sister School Scheme nor the Pilot Scheme before but have paired up with Mainland schools as sister schools on their own initiative, please also complete the **Reporting Form on Mainland Sister Schools (Annex 5)** together with **copies of relevant supporting documents**
- have not paired up with any sister schools in the Mainland yet and wish to do so through the coordination of EDB, please also complete the **Indication of Preference for Pairing Up with Mainland Schools (Annex 6)**

17. Schools should submit the above documents **by post** to the School Development Support Section, EDB, 5/F, East Wing, Central Government Offices, 2 Tim Mei Avenue, Tamar, Hong Kong. Schools applying for this recurrent grant for the first time should submit their applications on or before 15 July/15 February of each year. Schools may not be able to receive the recurrent grant in September of the next school year / April of the current school year if they submit applications late. They only need to submit the application form once. Once approved, annual application is not required thereafter.

18. In order to have a general picture on the Hong Kong-Mainland sister school pairs, schools should submit the **Reporting Form on Mainland Sister Schools (Annex 5)** together with **copies of relevant supporting documents** to EDB if they have paired up with their Mainland counterparts subsequently. On the other hand, schools that wish to pair up more sister schools through the coordination of EDB in future should complete and submit the **Indication of Preference for Pairing Up with Mainland Schools (Annex 6)** to EDB.

Unspent balance of the grant under the Pilot Scheme

19. For those aided, DSS or caput schools that have joined the Pilot Scheme, EDB will claw back any unspent balance of the grant by 31 August 2018 according to the school's annual audited accounts. For government schools, any unspent balance will lapse by that time.

Enquiry

20. For enquiries, please contact the School Development Support Section of EDB at 3509 8464 or 3509 8482.

K K LEE
for Permanent Secretary for Education

Points to Note

Usage of the Grant for the Sister School Scheme

Schools should ensure that expenditures incurred are reasonable and necessary for educational purposes in a cost-effective manner when using the Grant for the Sister School Scheme. In the event that expenditure is found improperly charged, EDB shall request the school concerned to explain the anomalies. In the absence of acceptable explanation, the school should make good such expenditure by charging it to other suitable resources. Besides, schools should have established their own school-based mechanism to handle the arrangement for this recurrent grant, e.g. the arrangement of tour fee for the students who have been approved to join sister school exchange activities but subsequently request to withdraw.

Examples of appropriate use of the recurrent grant

- expenses on package tour service incurred by school management, teachers and students for visiting Mainland sister schools
- cost of procuring services or hiring temporary supporting staff for handling relevant administrative work (*including all expenditures related to the employment, e.g. salaries, expenses arising from leave and statutory benefits such as Mandatory Provident Fund, etc., **the annual total expenditure should not exceed 20% of the recurrent grant for that school year***)
- expenses on activities jointly organised by sister schools and related expenses incurred in Hong Kong
- cost for video-conferencing facilities
- expenses on breakfasts/lunches/dinners of school principal and teachers in relation to their discharge of duties in sister school activities (*Schools are required to avoid lavishness and to make conscientious decision in providing such expenses. Schools should make reference to the limits of such expenses per occasion and per head quoted in the “Expanded Operating Expenses Block Grant User Guide for Aided Schools which have established an Incorporated Management Committee”/“Operating Expenses Block Grant User Guide for Aided Schools”. The IMC/SMC is required to provide full justifications if the expenses exceed the limits quoted.*)
- expenses on refreshments for exchange activities taking place in Hong Kong (***the annual total expenditure should not exceed 2% of the recurrent grant for that school year***)

- expenses on the single entry visa for teachers participating in Mainland sister school exchanges (*the annual total expenditure should not exceed 1% of the recurrent grant for that school year*)

Examples of inappropriate use of the recurrent grant

- the travelling, boarding and lodging expenses for the school personnel and students of Mainland sister schools on their visits to Hong Kong
- personal items and expenses
- expenses on students' visas
- purchasing personal and/or travel insurance for teachers and students participating in sister school exchange activities
- employing supply teachers
- protocol related expenses (e.g. crystal souvenirs, pennants etc.)

The above examples are for reference only and are non-exhaustive.

(Template)

[This template is for reference only. Schools can adapt its format to cater for their specific needs.]

Plan on Sister School Exchanges

_____ **School Year**

Name of the Mainland Sister School (1): _____

(2): _____

(3): _____

Please state the name and preliminary idea of planned exchange activities together with the methods of monitoring and evaluating the effectiveness of these activities.

Item No.	Name and Content of the Exchange Activity	Intended Objective(s)	Monitoring/Evaluation	Estimated Expenditure
1.	Name of the item • Which level is the activity organised for? What is the preliminary idea of this exchange activity?	• The intended objectives of the exchange activity	• How will school evaluate and report its effectiveness?	• What is/are the major expenditure(s) for the planned exchange activity?
2.				

(Template)

[This template is for reference only. Schools can adapt its format to cater for their specific needs.]

Report on Sister School Exchanges

_____ School Year

Name of the Mainland Sister School (1): _____

(2): _____

(3): _____

Part 1: Details of Exchange Activities

Item No.	Name and Content of the Exchange Activity	Intended Objective(s)	Evaluation Results	Reflection and Follow-up
1.	Name of the item • Details of the exchange activities • Number of school management, teacher and student participants in the exchange activity <i>(Please state the implementation details of the exchange activities.)</i>	• The intended objective(s) of the exchange activity	• Have the intended objectives of the exchange activities been attained? <i>(Please evaluate the extent to which the intended objectives have been achieved by means of appropriate evaluation methods such as questionnaires or interviews.)</i>	• How to improve subsequent exchange activities using the experience acquired from this exchange activity?

Part 2: Financial Report

Item No.	Name of the exchange	Expenditure Item	Amount	Remarks
1.	Name of the item	Examples:		
		Tour fees for visiting Mainland sister school		
		Expenses on activities jointly organised by sister schools in Hong Kong		
		Transportation fees		
		Salary for the supporting staff for handling administrative work of sister school exchange activities		
		Expenses on video-conferencing facilities		
		Expenses on materials used in the exchanges		
		Others		
		Total:		
		Annual Balance of Grant:		

Please return the completed Application Form **by post** to the School Development Support Section, Education Bureau.
 (Address: 5/F, East Wing, Central Government Offices, 2 Tim Mei Avenue, Tamar, Hong Kong)
*(Note: Please ensure that sufficient postage is paid to avoid unsuccessful delivery of mails.
 Any underpaid mail items will be disposed of by the Hong Kong Post.)*

Grant for the Sister School Scheme **Application Form**

To: Permanent Secretary for Education
 [Attn: Senior Education Officer (School Development Support) 1]

Endorsed by our **Incorporated Management Committee (IMC) /School Management Committee (SMC)***, our school now applies for the Grant for the Sister School Scheme. The information of our school is as follows: *(Please put a tick (✓) in the box as appropriate.)*

Name of School: _____

School Type: _____

☐ Secondary ☐ Primary ☐ Special

Finance Type: _____

☐ Government ☐ Aided ☐ DSS ☐ Caput

School Address: _____

School Telephone No. and Fax No.: _____

Telephone: _____

Fax: _____

School Email address: _____

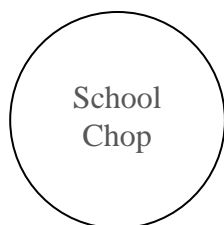
Name of Principal: _____

Name and Post of Teacher-in-charge of _____

Sister School/ the E-platform²: _____

Vice-principal/senior teacher/teacher/others*(Please specify): _____

- ☐ Our school has joined **the Sister School Scheme / and / the Pilot Scheme**.*
- ☐ Our school has not joined the Sister School Scheme or the Pilot Scheme yet, but has already paired up with Mainland schools as sister schools *(Please also submit Annex 5)*.
- ☐ Our school has no sister school in the Mainland and would like to pair up with Mainland schools as sister schools through the coordination of EDB *(Please also submit Annex 6)*.



Signature of Supervisor/SMC Chairman* : _____

Name of Supervisor/SMC Chairman* : _____

Date: _____

* Please delete as appropriate

² E-platform refers to the Electronic Platform for Sister Schools set up by EDB. EDB will contact the teacher-in-charge in due course about the creation of a user account. *(Only applicable to those schools that have no user account.)*

Please return the completed Reporting Form **by post** to the School Development Support Section, Education Bureau.
 (Address: 5/F, East Wing, Central Government Offices, 2 Tim Mei Avenue, Tamar, Hong Kong)
*(Note: Please ensure that sufficient postage is paid to avoid unsuccessful delivery of mails.
 Any underpaid mail items will be disposed of by the Hong Kong Post.)*

Sister School Scheme
Reporting Form on Mainland Sister Schools
 (Only applicable to those sister school pairs not reported to EDB before)

To: Permanent Secretary for Education
 [Attn: Senior Education Officer (School Development Support) 1]

We have joined / have not joined* the Sister School Scheme / the Pilot Scheme* and have paired up / newly paired up* with Mainland schools as sister schools. Details are as follows: *(Please attach copies of relevant supporting documents. If there are more than two sister schools, please use a separate sheet to provide the information.)*

Name of Sister School (1) :

School Type :

Secondary/Primary/Special*

Year of Forming Sister School:

Location of Sister School:

Province

City

Area

Name of Sister School (2) :

School Type :

Secondary/Primary/Special*

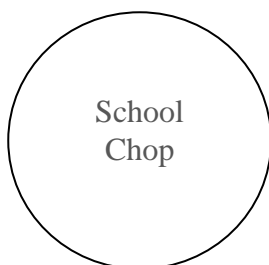
Year of Forming Sister School:

Location of Sister School:

Province

City

Area



Signature of Supervisor/SMC Chairman* :

Name of Supervisor/SMC Chairman* :

Name of Teacher-in-charge :

Name of School :

School Level : Secondary/ Primary/ Special*

School Telephone No.:

Date:

* Please delete as appropriate.

Please return the completed Indication of Preference **by post** to the School Development Support Section, Education Bureau.
(Address: 5/F, East Wing, Central Government Offices, 2 Tim Mei Avenue, Tamar, Hong Kong)

(Note: Please ensure that sufficient postage is paid to avoid unsuccessful delivery of mails. Any underpaid mail items will be disposed of by the Hong Kong Post.)

Sister School Scheme **Indication of Preference for Pairing Up with Mainland Schools**

To: Permanent Secretary for Education
[Attn: Senior Education Officer (School Development Support) 1]

We would like to form sister school pair(s) through the coordination of EDB. Our preference is as follows:
(Please put a tick (✓) in the box as appropriate.)

Part A: Location

- ☐ Forming sister school pair(s) according to the preference below. (Please put down the preference from 1 to 8 in the boxes below.)

Location	Bay Area#	Sichuan Province	Hainan Province	Shanghai Municipality	Beijing Municipality	Fujian Province	Cities in other Guangdong Province (Please specify)	Other provinces/cities (Please specify)
Preference								

#refers to Guangzhou, Shenzhen, Zhuhai, Foshan, Huizhou, Dongguan, Zhongshan, Jiangmen and Zhaoqing

Cities in other Guangdong provinces (Please specify: _____)

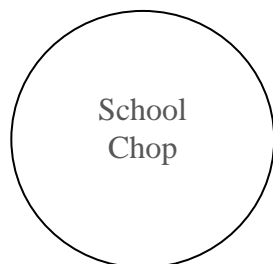
Other provinces and cities (Please specify: _____)

- ☐ Any provinces or cities arranged by EDB

Part B: School Characteristics

- ☐ school in remote area ☐ experimental school ☐ foreign language school ☐ vocational education
☐ technology education ☐ sports ☐ arts
☐ subject area (please specify: _____)
☐ others (please specify: _____)
☐ no specific choice

We understand that the preferences indicated above are used as reference for pairing only and the final result of pairing is subject to the actual circumstances. Should we have very special reasons for not pairing up with the school arranged by EDB, we will inform and explain to EDB in writing.



Signature of Supervisor/SMC Chairman* : _____

Name of Supervisor/SMC Chairman* : _____

Name of Teacher-in-charge : _____

Name of School : _____

School Level : Secondary/ Primary/ Special*

School Telephone No.: _____

* Please delete as appropriate.

Date: _____

Sister School Scheme

Personal Information Collection Statement

Purpose of Collection

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

Classes of Transferees

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

Access to Personal Data

4. You have the right to request access to and correction of your personal data held by EDB. Request for access or correction of personal data should be made in writing to Senior Education Officer (School Development Support) 1 at 5/F, East Wing, Central Government Offices, 2 Tim Mei Avenue, Tamar, Hong Kong or email to seosds1@edb.gov.hk.