

Education Bureau Circular No. 16/2019

Life-wide Learning Grant

[Note: This circular should be read by

- (i) Supervisors and heads of all government schools, aided schools (including special schools), caput schools and schools under the Direct Subsidy Scheme – for action; and
- (ii) Heads of sections – for information.]

Summary

The purpose of this circular is to set out the details about the disbursement of the Life-wide Learning Grant.

Details

2. Life-wide learning extends learning beyond the classroom to other contexts, and attaches great importance to learning in authentic contexts as it enables students to achieve learning objectives which are difficult to achieve through classroom learning alone. The knowledge, skills, positive values and attitudes that students acquire in experiential learning is important in developing their lifelong learning capabilities and fostering their whole-person development.

3. As proposed in the 2018 Policy Address, a recurrent Life-wide Learning Grant (the Grant) will be provided to public sector schools¹ (including special schools) starting from the 2019/20 school year to support schools in taking forward, on the present foundation, life-wide learning with enhanced efforts. As for schools under the Direct Subsidy Scheme (DSS), the provision of the Grant will be subsumed in the DSS unit subsidy rates. Schools may, in light of their school contexts, flexibly deploy the Grant to organise more out-of-classroom experiential learning activities in different Key Learning Areas (KLAs) and curriculum areas, so as to enliven and enrich the learning experiences² of students to broaden their horizons, enhance their learning motivation and interest, and foster their whole-person development.

Ambit of the Grant

4. Schools should, having regard to their school contexts and the learning needs of their students, engage teachers in the formulation of the objectives and strategies for implementing life-

¹ Excluding Caritas Chan Chun Ha Field Studies Centre, Ho Koon Nature Education cum Astronomical Centre, and Arts and Technology Education Centre.

² The school curriculum should provide students with five types of essential learning experiences, i.e. intellectual development, moral and civic education, community service, physical and aesthetic development, and career-related experiences.

wide learning, and make appropriate allocation of the resources to benefit as many students as possible. The Grant should be used directly on enriching students' learning experiences. Excessive allocation on the procurement of resources and meeting the expenses incurred by teachers for leading student activities should be avoided. Moreover, the use of the Grant should not be confined to a single project / area or a small number of students. Schools should not use the Grant on employing teaching or non-teaching staff, nor outsource the overall planning and implementation of life-wide learning to outside parties.

5. Schools should make good use of the Grant, in conjunction with other suitable resources provided by the EDB, to organise diversified life-wide learning activities. Schools may deploy the Grant to:

- organise out-of-classroom experiential learning activities and infuse life-wide learning into different KLAs / subjects and cross-curricular teaching;
- enrich students' learning experiences, including intellectual development, moral and civic education, community service, physical and aesthetic development, and career-related experiences;
- procure equipment (including repair and maintenance fees), consumables, and learning resources for promoting life-wide learning; and
- defray the expenses incurred by teachers for leading student activities³.

Calculation of the Grant

6. The Grant comprises a school-based component and a class-based component. For the 2019/20 school year, the school-based provision for each public sector school will be \$150,000; the class-based provision is calculated based on the number of approved classes at the per class rates of \$42,000 and \$25,000 for secondary and primary schools respectively. The Grant amount will be adjusted annually in accordance with the movement of the Composite Consumer Price Index.

Disbursement Arrangement

7. The Grant will be disbursed to aided schools and caput schools every school year in September, November, February and May. For government schools, the Grant will be allocated in the form of budget allocation in two batches in September and April of each school year. As for DSS schools, the Grant will be subsumed in the DSS unit subsidy rates.

Evaluation and Accountability

8. Schools are required to observe relevant EDB guidelines when using the Grant and are

³ Expenses incurred by teachers (for special schools, relevant teaching and non-teaching staff of the school may be included as necessary) for leading student activities (including the expenditures approved by the School Management Committees / Incorporated Management Committees for teachers to escort students in study tours in relation to the discharge of their duties) should be reasonable, necessary for educational purposes and spent in a cost-effective manner.

accountable for its proper use. In line with the principle of school-based management, schools are required to prepare a plan on the use of the Grant in accordance with its objectives, and incorporate the Plan for the school year into the Annual School Plan for endorsement by their School Management Committees (SMCs) / Incorporated Management Committees (IMCs). Schools should also regularly monitor the use of the Grant, and include the report on the use of the Grant consisting of the expenses and the evaluation results, in the School Report of the school year concerned for submission and endorsement by their SMCs / IMCs. Schools are required to upload the Annual School Plan and School Report (which consist of the Plan and Report on the Use of the Life-wide Learning Grant respectively) endorsed by their SMCs / IMCs onto the homepage of the schools for the sake of enhancing transparency and in accordance with the established practice. Please refer to **Annexes 1 to 3** for the Guidelines on the Use of the Grant, templates of the Plan and the Report on the Use of the Grant respectively.

Accounting and Financial Arrangement

9. Aided schools and caput schools are required to keep a separate ledger account to record all incomes and expenditures chargeable to the Grant and submit the annual audited accounts to the EDB in accordance with the existing requirements. Schools should also make available such records and related receipts / invoices to the EDB for inspection when necessary. For government schools, all relevant expenditures 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.

10. As the Grant is a purpose-specific grant, schools should use the Grant to meet the expenses on the promotion of life-wide learning as mentioned in Paragraph 5. Schools should manage their finances in a prudent manner. In case of deficit, aided schools and caput schools can top up the Grant by deploying the surplus under the Expanded Operating Expenses Block Grant / General Domain of the Operating Expenses Block Grant (for aided schools) and the surplus under the Fee Subsidy (for caput schools). If there is still unsettled deficit, it has to be met by the schools' own funds. Government schools may deploy the surplus under the Expanded Subject and Curriculum Block Grant to top up the Grant, if necessary.

11. Schools should observe the relevant EDB circulars and guidelines as appropriate when procuring outside services and goods.

Surplus Retention and Clawback Arrangement

12. As the Grant is a recurrent grant, schools are required to optimise the use of the Grant for the respective school year to provide diversified life-wide learning activities for students. Schools are, in principle, not expected to retain surplus of the Grant. Nevertheless, we understand that some schools may have cogent reasons for not fully utilising their funding within the school / financial year to better meet their operational needs. 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 school / financial year as detailed in the paragraphs below.

13. For aided schools and caput schools, we allow schools to retain an amount of unspent balance up to 12-month provision of the Grant disbursed for each school year and carry it forward for use in

the subsequent school year. The 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 the Grant is not allowed.

14. The arrangement for government schools is basically the same as that for aided schools and caput schools, except that government schools will be accounted for on a financial year basis. Separate allocation for the unspent balance (if any) of the preceding financial year will be provided at the beginning of the next financial year, and any unspent balance in excess of the cap will lapse at the end of the relevant financial year. Transfer of funds / unspent balance out of the Grant is not allowed.

Briefing Sessions

15. The EDB will organise briefing sessions to introduce to schools the implementation details of the Grant. For details of and enrolment for these briefing sessions, please refer to the Training Calendar System on the EDB website (Course ID: CDI020190694).

Enquiry

16. For the latest information on the Grant, Frequently Asked Questions, and exemplars on life-wide learning activities, please refer to the webpage of the Life-wide Learning Section of the EDB (Home > Curriculum Development > Curriculum Emphasis > Life-wide Learning). For enquiries, please contact the Life-wide Learning Section of the Curriculum Development Institute on 3540 7436 or 3540 6905.

Sheridan LEE
for Permanent Secretary for Education

Guidelines on the Use of Life-wide Learning Grant

Principles on the use of the Life-wide Learning Grant (the Grant)

1. Schools should properly deploy the Grant and make use of other suitable resources provided by the EDB in taking forward, on the present foundation, life-wide learning with enhanced efforts to promote students' whole-person development.
2. Schools should, in light of their development and the overall learning needs of their students, formulate appropriate objectives and strategies, and regularly examine and evaluate whether the resources are effectively utilised to achieve the objectives of the Grant.
3. School leaders should maintain good communication with teachers of all Key Learning Areas (KLAs) / functional groups to discuss the resource needs of different projects and make appropriate allocation of the resources.
4. Adhering to the principles of fiscal prudence and avoiding extravagance, schools should ensure that all expenditures are incurred to serve the purposes specified for the Grant and should keep in view the cost-effectiveness in order to benefit as many students as possible.
5. While the Grant is applicable to all students, it does not mean that the provision for each student has to be equal or that schools have to provide all life-wide learning activities free of charge. If a school needs to charge a fee for an activity, it should, following the established practice, set out the school-based criteria for determining the fee and inform parents and students accordingly.
6. Schools should strictly observe relevant circulars and guidelines on the use of public funds issued by the EDB, and deploy the Grant in a fair and transparent manner subject to the established principles and requirements.
7. Schools should not confine the use of the Grant to a single project / area or a small number of students. Prior approval from the School Management Committees (SMCs) / Incorporated Management Committees (IMCs) must be obtained for organising individual activities / projects that incur higher costs.

Ambit

8. Schools may deploy the Grant to:
 - organise out-of-classroom experiential learning activities and infuse life-wide learning into different KLAs / subjects and cross-curricular teaching;
 - enrich students' learning experiences, including intellectual development, moral and civic

education, community service, physical and aesthetic development, and career-related experiences;

- procure equipment (including repair and maintenance fees), consumables, and learning resources for implementing life-wide learning; and
- defray the expenses incurred by teachers for leading student activities⁴.

Examples on the use of Grant

9. Listed below are examples on the use of the Grant that are in line with the principles:

- Subsidising students' participation in life-wide learning activities organised or recognised⁵ by schools, including school-based learning activities, extra-curricular activities and after-school activities with clear learning objectives.
- Enriching students' learning experiences by defraying the activity and travelling⁶ expenses incurred:
 - Intellectual development (closely linked with curriculum): e.g. visits to exhibitions and field trips
 - Moral and civic education: e.g. leadership training, experiential learning camps and military camps
 - Community service: e.g. service learning and uniformed groups
 - Physical and aesthetic development: e.g. sports competitions and drama performances
 - Career-related experiences: e.g. work experience programmes and visits to enterprises
- Subsidising students' participation in local or non-local competitions by covering the expenses incurred for registration, transportation, accommodation, and procuring materials / apparel for the competitions.
- Subsidising students' participation⁷ in exchange activities outside Hong Kong⁸.

⁴ Expenses incurred by teachers (for special schools, relevant teaching and non-teaching staff of the school may be included as necessary) for leading student activities (including the expenditures approved by SMCs / IMCs for teachers to escort students in study tours in relation to the discharge of their duties) should be reasonable, necessary for educational purposes and spent in a cost-effective manner.

⁵ Activities recognised by schools refer to those organised by external organisations, and the schools have confidence in such organisations and acknowledge that the contents of the activities could help students achieve the objectives of life-wide learning (e.g. schools may nominate students to participate in programmes / activities / competitions organised by post-secondary institutions, sports associations and the Leisure and Cultural Services Department).

⁶ Schools should select the most suitable and economical mode of transportation according to needs.

⁷ The Grant should not cover personal items, consumer articles / items, or personal comprehensive travel insurance.

⁸ Schools may organise more expeditions and exchange activities to the Mainland or countries / regions along the Belt and Road for students to know more about the development of our country. Provided that the principles on the use of relevant funding(s) are observed, schools may use the Grant in conjunction with the EDB's funding(s) for the Mainland Exchange Programmes for students (including the subvention schemes) or the Sister School Scheme to make up for the subsidies as necessary when organising the related activities.

- Subsidising students' participation in fee-charging activities or training programmes (e.g. educational camps, scientific exploration activities and sports training) that are closely linked with different KLAs / subjects and cross-curricular learning and organised by local post-secondary institutions, non-profit-making organisations, academic associations and professional bodies.
- Purchasing equipment, instruments, tools (including repair and maintenance fees) and consumables (e.g. robotics kits, virtual reality tools) for promoting life-wide learning.
- Purchasing or developing mobile applications or relevant software (e.g. software for virtual reality or 3D graphics) to promote life-wide learning.
- Procuring or developing tools or related learning and teaching resources to promote life-wide learning.
- Purchasing materials and equipment (e.g. musical instruments, sports equipments, self-learning resource packages) for life-wide learning activities or training.
- Engaging scholars and professionals, etc. as speakers in thematic seminars.
- Procuring services from external organisations or hiring professionals / coaches to help schools organise extra-curricular / after-school activities (e.g. training on multiple intelligences, physical and aesthetic training, life planning activities) to promote life-wide learning.

10. Listed below are examples on the use of the Grant that are not in line with the principles:

- Employing teaching or non-teaching staff (except for procuring services from professionals / coaches to assist in organising life-wide learning activities).
- Outsourcing to outside parties the overall planning and implementation work for life-wide learning.
- Organising activities that are unrelated to different KLAs / subjects and life-wide learning.
- Subsidising students' participation in activities that are primarily focused on academic performance, e.g. tutorial groups.
- Subsidising students' participation in any form of assessment, or procuring services or materials to drill students for assessment.
- Subsidising teachers' participation in local or non-local training courses or professional exchange activities (however, expenses incurred by teachers for leading students in exchange activities outside Hong Kong can be covered).

- Subsidising seminars or activities for parents.
 - Meeting the costs of renovation / works done on the school building.
 - Purchasing equipment or tools for handling clerical work of the school.
 - Purchasing mobile computing devices, electronic equipment, computer software, etc. for general purposes.
 - Meeting banquet- or courtesy-related expenses.
 - Meeting the expenses on promotional and publicity activities, social events or celebrations (e.g. graduation dinners, parties).
 - Meeting the expenses for food and beverages (however, meal expenses included in the expenditures in educational / training camps, non-local exchange activities can be covered).
11. The above examples are by no means exhaustive. SMCs / IMCs should prudently deploy the Grant and properly allocate the resources, and should not confine the use of the Grant to a single project / area or a small number of students. SMCs / IMCs should also ensure that the resources are utilised in a cost-effective manner and that each item of expenditure incurred is in line with the principles and ambit of the Grant.

Points to note in conducting life-wide learning activities

12. Schools should make good use of the resources to promote a change in pedagogy in different subjects by organising more out-of-classroom experiential learning activities that are closely linked with the curriculum and relevant to everyday life, with a view to enhancing students' learning interest and facilitating their learning.
13. Regarding students' safety when participating in extra-curricular activities, schools should observe relevant guidelines provided by the EDB, such as "Guidelines on Outdoor Activities", "Guidelines on Extra-curricular Activities in Schools", and "Guidelines on Study Tours Outside Hong Kong". When planning and organising activities (including those co-organised with other parties), schools should ensure that the activities are free from danger to ensure the safety of students, and that the expected learning objectives could be achieved.
14. With the implementation of the Sexual Conviction Record Check Scheme by the Hong Kong Police Force, schools should, when appointing instructors or other persons to provide educational and related services for students, adopt the procedures under the Scheme to further ensure the safety of students. Details are set out in the EDB Circular Memorandum No. 179/2011.

(Template)
Life-wide Learning Grant
Plan on the Use of the Grant
 _____ School Year

Declaration: We understand clearly the principles on the use of the Life-wide Learning Grant and, after consulting teachers on the allocation of the resources, plan to deploy the Grant for promoting the following items.

Domain	Brief Description of the Activity	Objective	Date	Target Student (Level)	Brief Description of the Monitoring / Evaluation Mechanism	Estimated Expenses (\$)	Essential Learning Experiences (Please put a ✓ in the appropriate box(es); more than one option can be selected)				
							I	M	P	S	C
Category 1	To organise / participate in life-wide learning activities										
1.1	To organise life-wide learning activities in different KLAs / cross-KLA / curriculum areas to enhance learning effectiveness (e.g. field trips, arts appreciation, visits to enterprises, thematic learning day)										
Language											
Geography											
Chinese History											
...											
Cross-KLA (e.g. STEM)											

Domain	Brief Description of the Activity	Objective	Date	Target Student (Level)	Brief Description of the Monitoring / Evaluation Mechanism	Estimated Expenses (\$)	Essential Learning Experiences (Please put a ✓ in the appropriate box(es); more than one option can be selected)				
							I	M	P	S	C
							I: Intellectual Development (closely linked with curriculum) M: Moral and Civic Education P: Physical and Aesthetic Development S: Community Service C: Career-related Experiences				
1.2	To organise diversified life-wide learning activities to cater for students' interests and abilities for stretching students' potential and nurturing in students positive values and attitudes (e.g. activities on multiple intelligences; physical, aesthetic and cultural activities; leadership training; service learning; clubs and societies; school team training; uniformed groups; military camps)										
—											
1.3	To organise or participate in non-local exchange activities or competitions to broaden students' horizons										
1.4	Others										
						Estimated Expenses for Category 1					

Domain	Item	Purpose	Estimated Expenses (\$)
Category 2	To procure equipment, consumables and learning resources for promoting life-wide learning		
STEM			
PE			
Arts			
Others			
		Estimated Expenses for Category 2	
		Estimated Expenses for Categories 1 & 2	

Estimated Number of Student Beneficiaries

Total number of students in the school:	
Estimated number of student beneficiaries:	
Percentage of students benefitting from the Grant (%):	

(Template)
Life-wide Learning Grant
Report on the Use of the Grant
_____ School Year

Domain	Brief Description of the Activity	Objective	Date	Target Student (Level)	Evaluation Results	Actual Expenses (\$)	Nature of Expenses*	Essential Learning Experiences				
								(Please put a ✓ in the appropriate box(es); more than one option can be selected)				
								I	M	P	S	C
Category 1	To organise / participate in life-wide learning activities											
1.1	To organise life-wide learning activities in different KLAs / cross-KLA / curriculum areas to enhance learning effectiveness (e.g. field trips, arts appreciation, visits to enterprises, thematic learning day)											
Language												
Geography												
Chinese History												
...												
Cross-KLA (e.g. STEM)												
						Expenses on Item 1.1						

Domain	Brief Description of the Activity	Objective	Date	Target Student (Level)	Evaluation Results	Actual Expenses (\$)	Nature of Expenses*	Essential Learning Experiences (Please put a ✓ in the appropriate box(es); more than one option can be selected)						
								I	M	P	S	C		
								I: Intellectual Development (closely linked with curriculum) M: Moral and Civic Education P: Physical and Aesthetic Development S: Community Service C: Career-related Experiences						
1.2	To organise diversified life-wide learning activities to cater for students' interests and abilities for stretching students' potential and nurturing in students positive values and attitudes (e.g. activities on multiple intelligences; physical, aesthetic and cultural activities; leadership training; service learning; clubs and societies; school team training; uniformed groups; military camps)													
—														
						Expenses on Item 1.2								
1.3	To organise or participate in non-local exchange activities or competitions to broaden students' horizons													
						Expenses on Item 1.3								
1.4	Others													
						Expenses on Item 1.4								
						Expenses for Category 1								

Domain	Item	Purpose	Actual Expenses (\$)
Category 2	To procure equipment, consumables and learning resources for promoting LWL		
STEM			
PE			
Arts			
Others			
		Expenses for Category 2	
		Expenses for Categories 1 & 2	

* : Input using the following codes; more than one code can be used for each item.

Code for Expenses			
E1	Activity fees (registration fees, admission fees, course fees, camp fees, venue fees, learning materials, activity materials, etc.)	E6	Fees for students attending courses, activities or training organised by external organisations recognised by the school
E2	Transportation fees	E7	Purchase of equipment, instruments, tools, devices, consumables
E3	Fees for non-local exchange activities / competitions (students)	E8	Purchase of learning resources (e.g. educational softwares)
E4	Fees for non-local exchange activities / competitions (escorting teachers)	E9	Others (please specify)
E5	Fees for hiring expert / professionals / coaches		

Number of Student Beneficiaries

Total number of students in the school:	
Number of student beneficiaries:	
Percentage of students benefitting from the Grant (%):	