Quality Education Fund
Guide to Applicants

1. Scope of the Quality Education Fund
   The Quality Education Fund (QEF) is established to fund worthwhile initiatives on a pilot basis and one-off projects that are non-profit-making, aiming to raise the quality of school education, and to promote quality school education at all levels, i.e. kindergarten, primary, secondary and special education. For detailed information about the QEF, please refer to the QEF website: http://qef.org.hk.

2. Vision of the QEF
   The QEF encourages projects that support innovation and/or new development, enrichment of students’ learning experiences, and school-based initiatives that would suit the specific needs of students, teachers and contexts of individual schools as well as the school sector in accordance with education policies. The funded QEF projects are expected to promote quality teaching and learning in the above context with a view to enabling students to attain all-round development and develop positive values and attitudes as well as enhancing the professional capacity of schools and teachers.

   With the experiences in education in Hong Kong since the QEF’s establishment, innovation and/or new development would cover new ideas or practices (including enhancement and/or adaptation) which serve to supplement and/or complement the existing practices that would facilitate the development of schools to address the needs specific to their own contexts. This also covers projects which could build on and further expand the new ideas or practices that have been generated from projects previously funded by the QEF.

3. Eligibility for Application
   Schools, educational bodies and organisations registered under the laws of Hong Kong and individuals who are permanent residents in Hong Kong are eligible to apply.

4. Submission of Application
   Applications can be submitted throughout the year. They should be submitted through the Electronic Project Management System (EPMS) via the QEF website http://qef.org.hk. Other means of submission e.g. by post, by fax, by email or in person will not be accepted.

   When completing the application form, applicants have to read the “Explanatory Notes for Completing the Quality Education Fund Application Form” at Annex I for applications with grant sought exceeding $150,000 or at Annex II for applications with grant sought NOT exceeding $150,000, where applicable, in conjunction with this Guide.

5. Topical Areas and Activities
   Areas or activities under a project that could be funded by QEF may include but NOT limited to the following:
trying out new pedagogy;
(ii) developing school-based curriculum and/or assessment;
(iii) integrating information technology with school-based learning activities, such as blended learning, flip-classroom;
(iv) organising life-wide learning activities for students, including extra-curricular activities/educational visits;
(v) providing support services to cater for diverse needs of students;
(vi) offering school-based professional learning opportunities for teachers, librarians and principals; and/or
(vii) undertaking educational researches of different scales, including basic research that would have bearings on practices, action research, applied research and evaluation to address specific issues in education (in partnership with schools).

6. Project Themes

For applications with grant sought exceeding $150,000, the QEF will give priority consideration if they fall under any of the following themes categorized into three strands:

Learning and Teaching
(1) Catering for Learners’ Diversity
(2) Effective Learning and Teaching of Languages
(3) Enhancing Learning & Teaching, and Assessment Literacy with a view to Enhancing Student Learning Outcomes in Primary General Studies, Key Learning Areas/Subject Curricula and Liberal Studies
(4) Using e-Learning (IT) for Effective Learning
(5) Values Education
(6) Creative Arts and Culture Education

Support for Students and School Ethos
(7) Healthy Lifestyle and Positive Development of Students
(8) Support for Students with Diverse Needs
(9) Promoting Whole Child Development in Kindergarten Education

Management and Organisation
(10) Supporting Effective School Management and Leadership
(11) Teacher Development and Wellness for Promoting Schools as Learning Organisations

Details on the priority themes are at Annex III.

Applicants can propose projects under any priority theme that best suits the needs of the target beneficiaries. The QEF also welcomes projects that cut across themes for better cross-disciplinary understanding and coherence. Apart from the above priority themes, applicants can apply to undertake innovative projects that meet the needs of schools and/or the education sector. Detailed elaboration on the specific needs of the schools and/or the education sector and how they would be benefited should be provided.
7. **Number of Applications**

   (a) **For grant sought exceeding $150,000**

   All applicants can submit for each school year at most **TWO** applications under different themes provided that they are not the grantees of more than two on-going projects with grant sought exceeding $150,000 as at the commencement date of the project under application. The proposed commencement date of each project should be within one year from the date of submission. There is no restriction on the number of projects which an applicant can collaborate / participate.

   An **additional quota** of applications with grant sought over $150,000 but not exceeding $600,000 will be given to school applicants. Each school may have three on-going projects with grant sought exceeding $150,000 at the same time. With prior approval from the QEF, schools under the same sponsoring body with more than two schools may transfer the quota among themselves after taking into consideration the capacity and the needs of schools concerned.

   For **tertiary institutions** funded by the University Grants Committee, each eligible applicant can submit for each school year at most **THREE** applications under different themes provided that it is not the grantee of more than three on-going projects with grant sought exceeding $150,000 as at the commencement date of the project under application.

   (b) **For grant sought not exceeding $150,000**

   In addition to the respective quota on applications in each school year, each eligible applicant can submit at most **TWO** applications with grant sought not exceeding $150,000 under any theme in different contexts. At one time, a grantee should not have more than two on-going projects with grant sought not exceeding $150,000 as at the commencement date of the project under application. The proposed commencement date of each project should be within one year from the date of submission. There is no restriction on the number of projects which an applicant can collaborate / participate.

   (c) **Resubmission**

   Applicants will be allowed to resubmit each unsuccessful application **once**. Resubmission has to be made within 12 months from the submission date of the unsuccessful application.

8. **Responsibility of Applicant**

   Each application should be submitted under the name of one eligible applicant who will enter into an agreement with the QEF upon approval of the grant for the project. In case there are collaborating / participating schools and organisations, a party should be assigned to register as an applicant and be held responsible for the whole project.

   For tertiary institutions, a person of at least the rank of the head of a department or a centre should be registered as the responsible person in submitting the application. Should a person head two or more departments/independent centres, he/she is allowed to submit separate applications for the departments/centres respectively.

9. **Assessment Criteria**

   A QEF project should be mainly undertaken in Hong Kong. The funding required should be one-off without entailing recurrent expenditure on the part of the QEF. It should not duplicate any project that the Government is undertaking or about to undertake; nor should it duplicate funding for similar projects from other Government sources\(^1\). Projects that could have been

\(^1\)“Duplicate” means sheer copying or replication without adaptation or new elements.
funded by the applicant’s approved recurrent expenditure or other sources will not normally be considered except for cases well justified. For applications with grant sought exceeding $150,000, priority consideration will be given to projects that carry or further the themes set out in paragraph 6 of this Guide, and those which can produce a sustainable impact on the target beneficiaries and the education sector in general. Projects with matching contributions from other non-government sources will be more favourably considered.

Project proposals will be assessed in accordance with, but not limited to, the criteria under three areas, viz (a) Project Needs; (b) Project Feasibility; and (c) Expected Project Outcomes. The project proposals must demonstrate an innovative element and strive to meet the criteria in all the three areas.

Specific assessment criteria under the three areas are listed at Annex I(a) for applications with grant sought exceeding $150,000 and Annex II(a) for applications with grant sought not exceeding $150,000 respectively.

10. Agreement

Successful applicants are required to sign an agreement with the QEF. Such agreement will set out in detail the conditions of the grant. Applicants could make reference to the terms and conditions set out in the Agreement currently in force on the QEF website (http://qef.org.hk). The respective General Guidelines on (i) Management and Monitoring of Projects, (ii) Staff Administration and Procurement Matter and (iii) Handling of Assets, which form part of the Agreement conditions, are available from the QEF website.

11. Monitoring

All approved projects will be subject to monitoring by the QEF. The grantees are required to play an active role in project monitoring and self-evaluation. Upon obtaining approval of grant for a project, a grantee will be required to submit reports for project monitoring purpose on a regular basis. Upon completion of the project, submission of a final report and an end-of-project financial statement will be required. Applicants could make reference to the ‘General Guidelines on Management and Monitoring of Projects’ on the QEF website (http://qef.org.hk).

12. Promotion and Dissemination

Grantees/project leaders are required to participate actively in the promotion, publicity and dissemination activities organised or facilitated by the QEF.

13. Intellectual Property Rights

The contents, the deliverables and the products developed from all projects sponsored by the QEF, including but not limited to all texts, graphics, drawings, diagrams, photographs, audio and video recordings and compilation of data or other materials (collectively, the “Products”) are protected by intellectual property rights. Unless otherwise indicated, the Permanent Secretary for Education Incorporated is the owner of the copyright and other intellectual property rights in the Products. Applicants are encouraged to read the ‘QEF Intellectual Property Rights Policy’ on the QEF website (http://qef.org.hk).

Quality Education Fund Secretariat
March 2016
Annex I

Explanatory Notes for Completing the Quality Education Fund (QEF) Application Form for Applications with Grant Sought Exceeding $150,000
(to be read in conjunction with the ‘Guide To Applicants’)

Applications for the QEF with grant sought exceeding $150,000 should be made by completing the electronic application form, and submitting project summary and project details together through the Electronic Project Management System (EPMS) on the QEF website (http://qef.org.hk).

Registration as EPMS User

Organisations and individuals who are interested in applying for or collaborating / participating in a QEF project are required to register as a user and create a user account in the EPMS. For registration, it is necessary to complete and submit the registration form via the EPMS and send by mail to the QEF Secretariat relevant documents proving that the organisation is registered under the laws in Hong Kong or his/her status as a permanent resident in Hong Kong, whichever is applicable. Should all information and documents provided be proper, the registration process will be completed normally within seven working days.

Provided that the applications submitted are complete and all required documents are proper, applications with grant sought not exceeding $600,000 will be processed normally within three to four months (subject to the number of applications received) and those above $600,000 within six months.

Part A  Project Particulars

Project Period

1. The first date of the month stated will be regarded as the commencement date and the last date of the month stated will be regarded as the end date. The applicant should only commence the project after funding approval has been obtained from the QEF and an agreement has been signed with the QEF. The applicant should insert a realistic commencement date for the proposed project.

Particulars of Applicant

2. If the applicant is an organisation, please state the name of the organisation and the head of the organisation. For tertiary institutions, please state the name of the department/centre and the head of the department/centre.

Part B  Project Summary

3. Please provide a summary of the proposed project in one page of A4 size at font size no smaller than 11points. The project summary should include goals and objectives, targets (expected number of beneficiaries), implementation plan (duration, process / schedule,
Part C  Project Details

4. Please provide details of the proposed project in no more than 15 pages of A4 size at font size no smaller than 11 points and submit the file saved in .pdf format through the EPMS. Applications will not be accepted if the proposals are found to have exceeded the allowable page limits. The project is assessed based on the details provided against the criteria listed at Annex I(a).

Needs Assessment and Applicant’s Capability

5. The applicant should give a background against which the project is conceived. School-based applications should provide a brief introduction of the school, including its vision and missions and describe the baseline, i.e. the school’s present situation, learning characteristics of students and achievement against the project goals. It is important to state how the project will become part of the school’s strategic development, i.e. how the project meets the needs and priorities of the school and the students. The applicant is expected to analyse objectively whether he/she is ready or possesses the ability/conditions/facilities for project implementation and desirable experience in implementing projects or activities of similar nature.

Goals and Objectives

6. The applicant should set out both short-term (those attainable within the project period) and long-term goals (those attainable beyond the project period). In case of schools, the goals should be consistent with the identified needs of the applicant school and be compatible with the educational priorities of the school system. Where appropriate, the goals should be broken down into objectives which should indicate observable behavioural changes in the target beneficiary group. Specifically, the objective statements should identify:

- Audience – the target beneficiary group
- Behaviour – the target performance (or learning outcomes) or behavioural changes
- Conditions – situation under which the behavioural changes are expected to occur
- Degree – the criteria for measuring success

Targets and Expected Number of Beneficiaries

7. The applicant should specify the number of operating classes, the targets (e.g. students, teachers, parents) and expected number of direct and indirect beneficiaries, where appropriate. For projects involving more than one participating school, the expected number of beneficiaries in each school should be stated.
Innovation
8. As the QEF encourages innovation and/or new development, new ideas or enhancement of existing practices to be introduced and new strategies or methodologies to be adopted should be elaborated. They can be unique and pilot in nature including new ideas and implementation method suitable for the target beneficiaries, and to supplement and/or complement the existing practices that will facilitate the development of schools to address the needs specific to their own contexts or the education sector to bring about positive capacity and/or impact on learning and teaching. They can also be new or further developed ideas that are building on projects with successful experiences and good practices (including enhancement, adaptation). For applications which build on projects with successful experiences and good practices, the new elements to be introduced should be provided, such as meeting new development needs or suit different school contexts.

Conceptual Framework
9. The applicant should provide an underlying theoretical framework, rationale or professional principles / justifications which is conceptually sound and/or backed up by relevant literature review / elaboration.

Implementation Plan with Timeline
10. The implementation plan should include the schedule and details of the activities to be organised and state their relevance to the attainment of the project objectives. Supporting information and documents should be provided to illustrate the feasibility of the project and the capacity of the school in bringing the project to fruition. These include, where applicable, curriculum vitae of trainers, safety measures, contingency plans, samples of products, and where appropriate, availability of storage space for hardware to be acquired, etc. The proposal should list out the key stages of implementation and the expected outcomes of each key stage so as to allow effective monitoring of project progress. The proposal should also give details of collaboration with other parties, if any.

Teachers’ and Principals’ Involvement in the Project
11. The applicant must explain clearly the degree of teachers’ and / or principals’ involvement and their role in the project. The QEF aims to encourage teachers to participate in and principals to support the projects rather than contracting out the services, thereby enhancing their professional competence and ensuring the sustainability of the project activities. The applicant should provide a brief curriculum vitae of the project leader and other key team members / tutors / instructors / consultants, etc.

Budget
12. All project funds must be exclusively used for the project and incurred within the project period. The applicant should submit a detailed budget with expenditure, income and justifications. For projects which extend beyond one year or involve a large amount of grant sought, breakdown by stages and years is required. Each stage of the project will be evaluated and fund for the next stage will only be released on satisfactory completion of the present stage. Unless under special circumstances, the QEF will only cover expenses incurred during the project period between the commencement date and end date of the project as set out in the agreement signed with the QEF.
13. In preparing the budget, the applicant should make reference to the latest market price, including remuneration packages commensurate with qualifications and experience of the proposed personnel, and the pricing standards suggested on the QEF website (http://qef.org.hk). Strict economy should be exercised in incurring any expenses to avoid lavishness. The applicant can also refer to the general principles for determining allowable costs stipulated in the QEF ‘General Guidelines on Management and Monitoring of Projects’.

14. External tutors, instructors or speakers can be employed, if required. Remuneration for them should be calculated on an hourly basis.

15. Some projects may require the employment of short-term or part-time personnel, such as guest speakers, research assistants and technicians to carry out duties specific to the project. Salaries of such personnel should be calculated on a time-on-project basis. While salary should be commensurate with qualifications and experience, candidates are normally assumed to be appointed at the minimum pay rates. Strong justifications are required for the appointment of personnel at higher pay rates.

16. To ensure fairness, staff must be recruited through an open and competitive system. Besides, the estimated staff costs should not include any ‘hidden’ costs for which an individual is already paid, such as salaries of teaching staff who spend a portion of their time on the project. If it is essential for a teacher to be engaged full time on the project over a prolonged period, consideration may be given to the appointment of a supply teacher with the qualifications and experience comparable to the teacher staff concerned by the school so as to minimise any adverse impact on the students and alleviate the workload on teachers.

17. All project personnel, if employed on a full-time basis, should be remunerated on a fixed salary point during the whole project period. In normal circumstances, salary increment is not granted. Fringe benefits of staff, e.g. education allowance, medical insurance, housing allowance, etc. should not be included in or charged to the project. Terms of employment should be specified in accordance with the Employment Ordinance, Employees’ Compensation Ordinance and, where applicable, the Mandatory Provident Fund Schemes Ordinance. Brief job descriptions and qualifications required for the project personnel should be provided.

18. For equipment items such as computer, digital camera, Tablet PC, projector, etc., the applicant should deploy its resources, where possible, and those acquired in previously funded QEF projects for implementation of the proposed project. Strong justifications including the proposed usage rate and the use of equipment items to enhance learning and teaching effectiveness (such as mobile devices catering for the needs of a specific group of students) have to be provided for acquisition of the above equipment and other asset items.

Should the application be approved, the applicant should also revise the proposal to include an asset usage plan to account for the deployment of reusable equipment and assets upon project completion. Reference could be made to the ‘General Guidelines on Handling of Assets’ on the QEF website (http://qef.org.hk).

19. All procurements of goods and services should be carried out on an open, fair and competitive basis.
20. The ‘General Expenses’ item is a catch-all category for costs which cannot be included in any of the other items. Details of the item with justifications and breakdown should be provided. For projects submitted by tertiary institutes funded by the University Grants Committee that incur overhead charges, the institute may include the item in the budget together with details, justifications and breakdown.

21. The applicant is advised to include an adjustment for inflation/deflation not exceeding the prevailing rate when preparing for projects which extend beyond a year. A contingency provision of not more than 3% of the total budget exclusive of staff cost is considered acceptable for projects lasting for more than one year.

22. The principle of economy and cost effectiveness of expenditure should be observed in budgeting. The applicant should make the best use of the existing facilities and resources including those acquired under previously funded QEF projects, if applicable, to implement the project. Item descriptions that are too brief and without justifications may not be considered for funding support.

23. The QEF sponsors the costs/fees of students participating in activities including camps, study trips, leadership training programmes, etc.

24. For projects which involve trips for students outside Hong Kong, the QEF sponsors half of the cost/fee of students participating in the activities or half of the funding ceiling, whichever is the lower. The funding ceiling will be based on the destination of the trip.

The funding ceiling on the cost/fee of the trip per student is as follows:

<table>
<thead>
<tr>
<th>Destination</th>
<th>Funding Ceiling per Student per Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia (including the Mainland China and Middle East)</td>
<td>$6,500</td>
</tr>
<tr>
<td>Africa</td>
<td>$10,500</td>
</tr>
<tr>
<td>Europe and America</td>
<td>$11,500</td>
</tr>
</tbody>
</table>

The QEF would provide additional funding support to socio-economically disadvantaged students enrolled in the activities. The actual subsidy for each student may vary depending on their social-economic background.

- For students in receipt of the Comprehensive Social Security Assistance (CSSA) and full remission under the Student Financial Assistance Scheme (SFAS), they will receive 100% support of the costs/fees involved in their overseas trips or the funding ceiling of the respective destination, i.e. $6,500 / $10,500 / $11,500, whichever is the lower.
- For students in receipt of half remission under the SFAS, they will receive 75% support of the costs/fees involved in their overseas trips or the funding ceiling of the respective destination, i.e. $4,875 / $7,875 / $8,625, whichever is the lower.
- For general students, they will receive 50% support of the costs/fees involved in their overseas trips or the funding ceiling of the respective destination, i.e. $3,250 / $5,250 / $5,750, whichever is the lower.

25. Student trips supported by the QEF should have learning and teaching elements which should be relevant to school curriculum. QEF may provide top-up funding according to the principle set out in paragraph [24] to sponsor needy students to participate in educational visits, including those supported / organized by the Government and/or other organisations.
26. The QEF encourages the applicant to collaborate with other organisations on funding arrangements. The applicant is requested to provide detailed information on the subsidy, if any, from sources other than the QEF including the source(s), availability date and amount. More favourable consideration will be given to applicants with matching contribution.

27. Grantees of projects with approved grant exceeding $100,000 are required to submit audited accounts upon project completion and they could include the audit fees under this item. QEF will cover up to $5,000 of the audit fee for a project with approved grant of $1 million or less, and up to $15,000 for a project with approved grant exceeding $1 million.

28. Should the application be approved, the applicant should open and maintain with a licensed bank in Hong Kong a bank account for the sole purpose of keeping and transacting all monies of the Grant. For tertiary institutes, a separate ledger in the Grantee’s accounting system should be set up designated for the said purpose. Details could be found in the ‘Agreement Between the Permanent Secretary for Education Incorporated and the Grantee on Quality Education Fund’ on the QEF website (http://qef.org.hk). The Grant should be deposited to the designated account of the applicant bearing account names such as “ABC Primary School – QEF Account” and “XYZ Association – QEF Account”.

Expected Project Outcomes

29. The applicant should state the expected tangible deliverables such as publications, websites and educational resources developed, as well as intangible outcomes, e.g. enhancement of target students’ language proficiency. He/She should envisage in the application the means through which the project deliverables or expected outcomes could best be disseminated, and assess the commercialization value and potential of such deliverables/expected outcomes.

30. If the project deliverables include a website or electronic books, the applicant may consider the feasibility of hosting the electronic deliverables on the school website or other professional educational portals such as the HKEdCity (www.hkedcity.net) for dissemination.

Project Evaluation

31. A self-evaluation model has to be included in each application. The applicant should set out the parameters for evaluating the effectiveness of the project. He/She should also specify a rigorous evaluation methodology as an integral part of the project design to facilitate internal evaluation and external validation of project effectiveness. A criterion-referenced, evidence-based approach to evaluation should be adopted. The focus should be placed on the outputs, expected outcomes, impact and effectiveness, including cost effectiveness. In addition, the application should have clearly designated indicators and measures of success along with the means by which relevant data will be collected. A recommended model and some useful reference materials are available on the QEF website (http://qef.org.hk).

32. Evaluation needs to be undertaken at every point in the project from where it starts to impact. It is therefore imperative for projects to provide baseline and target data (context evaluation and needs assessment), detailed plans (input evaluation), progress reports
(process evaluation), impact analysis and achievement against targets (output/outcome evaluation) and plans for dissemination of the project ideas, materials and results. Benchmarks and performance indicators may also be used.

**Sustainability of Project Outcomes**

33. The applicant should elaborate how the project can add value to the school / students / teachers / principals or the education sector as a whole.

34. The applicant should state how the key activities and/or the impact of the project can be sustained, if relevant, after project completion or exhaustion of the QEF grant. Where relevant, the applicant should state the future funding arrangement, for instance, contribution from School Council, Parent-Teacher Association, alumni, school sponsoring body, community organisations, commercial concerns and other groups. Where appropriate, evidence of commitment for such funding arrangement should be provided.

**Dissemination/Promotion of Project Outcomes**

35. The applicant, when relevant, must describe the promotion / dissemination plan of the project, including the means to implement such plan, and a clear plan for the distribution of project deliverables at least within the school or with other participants of the project.

**Part D Details of Collaborating / Participating Organisations**

36. Applicants should seek prior consent from the collaborating / participating schools and organisations for the project, and provide a list of collaborating / participating schools and organisations in the EPMS. The collaborating / participating schools and organisations are required to confirm collaboration / participation in the EPMS within 14 days from the date of submission of the application.

37. Applications will be processed upon receipt of confirmations from the collaborating/participating schools and organisations in the EPMS. Should no confirmation be made, the schools and organisations concerned will not be counted as valid collaborators / participants.

**Part E Declaration**

38. The head / person-in-charge of the applicant organisation should confirm the organisation’s eligibility for application and declare that all the information given in the application is true and accurate and there is no duplication of funding from other Government sources for the same activities. Should the application be approved, he/she is also required to pledge to participate actively in project promotion, publicity and dissemination activities in respect of his/her project.

39. All school applicants will be required to produce, upon approval of the project, documentary proof of endorsement by the School Management Committee / Incorporated Management Committee that the project aligns with the needs and development of the school and the project is supported by teachers.
Application

40. All applications should be submitted through the EPMS on the QEF website (http://qef.org.hk).

41. Enquiries should be addressed to the QEF Secretariat

Address: Room 403, 4/F, Cityplaza 3,
         14 Taikoo Wan Road, Hong Kong

Hotline: 2921 8833
Fax: 2186 8183
Email: qefenq@edb.gov.hk

Quality Education Fund Secretariat
March 2016
Personal Information Collection Statement

Purpose of Collection

1. The personal data provided in the application will be used by the Quality Education Fund Steering Committee, its relevant sub-committees and the QEF Secretariat for the purpose of assessing applications to the Quality Education Fund. For successful applications, such data will also be used for project monitoring, promotion, publicity and dissemination purposes as appropriate.

2. The provision of personal data in the application is voluntary. The lack of certain information may affect the assessment of the application.

Classes of Transferees

3. Personal data provided in this application may be disclosed by the Steering Committee, if necessary, to the Education Bureau, other Government departments, expert reviewers, monitoring members of the projects and other people concerned.

Access to Personal Data

4. Applicants have the right to access and correct the personal data provided in accordance with sections 18 and 22 and Principle 6 of Schedule 1 of the Personal Data (Privacy) Ordinance. Their right of access includes the right to obtain a copy of their personal data provided in the application.

Enquiries

5. Enquiries concerning the personal data collected by means of the application, including access and corrections should be addressed to:

Quality Education Fund Secretariat
Room 403, 4/F, Cityplaza 3,
14 Taikoo Wan Road, Hong Kong

Tel: 2123 6090
Fax: 2186 8183
Website: http://qef.org.hk
Annex I(a)

Specific assessment criteria for applications with grant sought exceeding $150,000

Project Needs
1. **School Needs/Development**
   The needs of beneficiary school(s)/education sector should be identified and substantiated with evidence. The project should meet the identified needs and add value to school’s development.

2. **Goals and Objectives**
   The project goals should align with the identified needs/school’s development plan and Government’s education priorities. The objectives should be realistic and achievable, stating the beneficiaries, the attributes to be assessed and the target performance.

3. **Innovation**
   Innovative ideas or new practices to enhance, adapt, complement and/or supplement the existing practices that will facilitate the new development of schools to address the needs specific to their own contexts or the education sector to bring about positive capacity and / or impact on learning and teaching should be elaborated in the proposal.

Project Feasibility
4. **Project Design**
   The proposal should be supported by professional justifications or rationale, or conceptual framework reflecting evidence or insights from research and literature. There should be detailed and feasible implementation plan which includes specific timelines, modes of operation, target participants and personnel involved for the implementation. The proposed activities should be coherent with the stated objectives. The applicant’s readiness should be illustrated by relevant supporting documents, survey findings of stakeholders’ initial response and the availability of the required expertise and resources.

5. **Staff Development**
   The principal/teachers should play an active role in the project design, implementation and management. Apart from knowledge transfer, there should be evidence of collaboration, teamwork and sharing among teachers or other groups such as parents.

6. **Budget and Commitment**
   The budget should be commensurate with the expected project outcome and scale of the project, in line with the QEF pricing standards and all expensive items should be justified. The existing facilities and resources should be optimized to ensure cost-effectiveness.

Expected Project Outcome
7. **Evaluation**
   The proposed evaluation method should be concrete; the data to be collected and the method to analyze the collected data should be specified. The instruments and indicators used should be appropriate for the scale of the project and measuring the overall success in meeting the objectives of the project.
8. **Sustainability**
   There should be a feasible plan to sustain the key activities after completion of the project, such as integrating the developed learning programme or activities into the school’s future curriculum.

9. **Dissemination**
   The deliverables/expected outcomes of the project should have good value for sharing with the school sector and/or should have high potential to benefit a wider reach of the community through different means. A dissemination plan with timelines should be available and the mode of dissemination should be appropriate and multifarious especially for projects of larger scale.
Annex II

Explanatory Notes for Completing the Quality Education Fund (QEF) Application Form for Applications with Grant Sought Not Exceeding $150,000 (to be read in conjunction with the ‘Guide To Applicants’)

This explanatory note is designed to provide information on the arrangement for submission of applications for the QEF with grant sought not exceeding $150,000. The arrangement aims to facilitate applicants to apply for grants to implement worthwhile pilot initiatives and one-off projects that would suit the specific needs of students, teachers and contexts of individual schools.

Applications for the QEF with grant sought NOT exceeding $150,000 should be made by completing the electronic application form and the proposal template at Annex V for preparing a project proposal for submission through the Electronic Project Management System (EPMS) on the QEF website (http://qef.org.hk).

Registration as EPMS User

Organisations and individuals who are interested in applying for or collaborating/participating in a QEF project are required to register as a user and create a user account in the EPMS. For registration, it is necessary to complete and submit the registration form via the EPMS and send by mail to the QEF Secretariat relevant documents proving that the organisation is registered under the laws in Hong Kong or his/her status as a permanent resident in Hong Kong, whichever is applicable. Should all information and documents provided be proper, the registration process will be completed normally within seven working days.

Provided that the applications submitted are complete and all required documents are proper, applications with grant sought not exceeding $150,000 will be processed normally within three to four months (subject to the number of applications received).

Part A Project Particulars

Project Period

1. The first date of the month stated will be regarded as the commencement date and the last date of the month stated will be regarded as the end date. The applicant should only commence the project after funding approval has been obtained from the QEF and agreement has been signed with the Fund. The applicant should insert a realistic commencement date for the proposed project.

Particulars of Applicant

2. If the applicant is an organisation, please state the name of the organisation and the head of the organisation. For tertiary institutions, please state the name of the department/centre and the head of the department/centre.
Part B  Project Proposal

3. The project proposal should not exceed six pages of A4 size at font size no smaller than 11 points and single line spacing. Documents submitted should be in .pdf format. The electronic application form and the project proposal should be submitted through the EPMS (http://qef.org.hk). Applications exceeding the page limit will not be accepted. The project is assessed based on the proposal against the criteria listed at Annex II(a).

Targets and Expected Number of Beneficiaries

4. The applicant should specify the targets (e.g. students, teachers, parents), expected number of direct beneficiaries and the number of participating schools.

Project Goals and Objectives

5. The applicant should state the project aims in clear and concise terms. In case of schools, the aims should be consistent with the identified needs of the applicant school and be compatible with the educational priorities of the school system. The aims should indicate observable behavioural changes in the target beneficiary group. Specifically, the statements should identify:-
   • Audience – the target beneficiary group
   • Behaviour – the target performance (or learning outcomes) or behavioural changes
   • Conditions – situation under which the behavioural changes are expected to occur
   • Degree – the criteria for measuring success

Needs and Priority of Schools

6. The applicant should give a background against which the project is conceived, e.g. literature review or survey findings. School-based applications should briefly describe its own context, i.e. the school’s present situation, learning characteristics of students and achievement against the project goals. It is important to state how the project will become part of the school’s strategic development, i.e. how the project meets the needs and priorities of the school and the students. The applicant may also describe the relevant experience in implementing projects or activities of similar nature.

Innovation

7. As the QEF encourages innovation and/or new development, new ideas or practices to be introduced and new strategies or methodologies to be adopted should be elaborated. They can be unique and pilot in nature including new ideas and implementation method suitable for the target beneficiaries, and to supplement and/or complement the existing practices that will facilitate their development to address the needs specific to their own contexts or the education sector to bring about positive capacity and/or impact on learning and teaching. They can also be new or further developed ideas that are building on projects with successful experiences and good practices (including enhancement, adaptation). For applications which build on projects with successful experiences and good practices, the new elements to be introduced should be provided, such as meeting new development needs or suiting different school contexts.

Approach / Design / Activity

8. The applicant should describe the design of the project by stating the approach / activities to be adopted for attaining the project objectives. Relevant literature review / elaboration of rationale or professional principles may also be included.
Implementation Plan with Timeline

9. The implementation plan should include the schedule and details of the activities to be organised and state the target beneficiary of the proposed activities when appropriate. The proposal should list out the key stages of implementation so as to allow effective monitoring of project progress. The proposal should also give details of collaboration with other parties, if any.

Teachers’ and Principals’ Involvement in the Project

10. The applicant must explain clearly the degree of teachers’ and/or principals’ involvement and their role in the project. The QEF aims to encourage teachers to participate in and principals to support the projects rather than contracting out the services, thereby enhancing their professional competence. The applicant should provide the qualification and experiences requirements of tutors/instructors/consultants, etc. where necessary.

Budget

11. All project funds must be exclusively used for the project and incurred within the project period. The applicant should submit a detailed budget with expenditure, income and justifications. Unless under special circumstances, funding of the QEF will only cover expenses incurred during the period between the commencement date and the end date of the project as set out in the agreement signed with the Government.

12. In preparing the budget, the applicant should make reference to the latest market price, including remuneration packages commensurate with qualifications and experience of the proposed personnel, and the pricing standards suggested on the QEF website (http://gef.org.hk). Strict economy should be exercised in incurring any expenses to avoid lavishment. The applicant can also refer to the general principles for determining allowable costs stipulated in the QEF ‘General Guidelines on Management and Monitoring of Projects’.

13. External tutors, instructors or speakers can be employed, if required. Remuneration for them should be calculated on an hourly basis.

14. Some projects may require the employment of short-term or part-time personnel, such as guest speakers, research assistants and technicians to carry out duties specific to the project. Salaries of such personnel should be calculated on a time-on-project basis. While salary should be commensurate with qualifications and experience, candidates are normally assumed to be appointed at the minimum pay rates. Strong justifications are required for the appointment of personnel at higher pay rates.

15. To ensure fairness, staff must be recruited through an open and competitive system. Besides, the estimated staff costs should not include any ‘hidden’ costs for which an individual is already paid, such as salaries of teaching staff who spend a portion of their time on the project. If it is essential for a teacher to be engaged full time on the project over a prolonged period, consideration may be given to the appointment of a supply teacher with the qualifications and experience comparable to the teacher staff concerned by the school so as to minimise any adverse impact on the students and alleviate the workload on the teacher.
16. All project personnel, if employed on a full-time basis, should be remunerated on a fixed salary point during the whole project period. In normal circumstances, salary increment is not granted. Fringe benefits of staff e.g. education allowance, medical insurance, housing allowance, etc should not be included in or charged to the project. Terms of employment should be specified in accordance with the Employment Ordinance, Employees’ Compensation Ordinance and, where applicable, the Mandatory Provident Fund Schemes Ordinance. Brief job descriptions and qualifications required for the project personnel should be provided.

17. For equipment items such as computer, digital camera, Tablet PC, projector, etc., the applicant should deploy its resources, where possible, and those acquired in previously funded QEF projects for implementation of the proposed project. Strong justifications including the proposed usage rate and the use of equipment items to enhance learning and teaching effectiveness (such as mobile devices catering for the needs of a specific group of students) have to be provided for acquisition of the above equipment and other asset items.

Should the application be approved, the applicant should revise the proposal to include an asset usage plan to account for the deployment of reusable equipment and assets upon project completion. Reference could be made to the ‘General Guidelines on Handling of Assets’ on the QEF website (http://qef.org.hk).

18. All procurements of goods and services should be carried out on an open, fair and competitive basis.

19. The ‘General Expenses’ item is a catch-all category for costs which cannot be included in any of the other items. Details of the item with justifications and breakdown should be provided. For projects submitted by tertiary institutes funded by the University Grants Committee that incur overhead charges, the institute may include the item in the budget together with details, justifications and breakdown.

20. The applicant is advised to include an adjustment for inflation/deflation not exceeding the prevailing rate when preparing for projects which extend beyond a year. A contingency provision of not more than 3% of the total budget exclusive of staff cost is considered acceptable for projects lasting for more than one year.

21. The principle of economy and cost effectiveness of expenditure should be observed in budgeting. The applicant should make the best use of the existing facilities and resources including those acquired under previously funded QEF projects, if applicable, to implement the project. Item descriptions that are too brief and without justifications may not be considered for funding support.

22. The QEF sponsors the costs/fees of students participating in activities including camps, study trips, leadership training programmes, etc.

23. For projects which involve trips for students outside Hong Kong, the QEF sponsors half of the cost/fee of students participating in the activities or half of the funding ceiling, whichever is the lower. The funding ceiling will be based on the destination of the trip.
The funding ceiling on the cost/fee of the trip per student is as follows:

<table>
<thead>
<tr>
<th>Destination</th>
<th>Funding Ceiling per Student per Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Asia (including the Mainland China and Middle East)</td>
<td>$ 6,500</td>
</tr>
<tr>
<td>- Africa</td>
<td>$10,500</td>
</tr>
<tr>
<td>- Europe and America</td>
<td>$11,500</td>
</tr>
</tbody>
</table>

The QEF would provide additional funding support to socio-economically disadvantaged students enrolled in the activities. The actual subsidy for each student may vary depending on their social-economic background.

- For students in receipt of the Comprehensive Social Security Assistance (CSSA) and full remission under the Student Financial Assistance Scheme (SFAS), they will receive 100% support of the costs/fees involved in their overseas trips or the funding ceiling of the respective destination, i.e. $6,500 / $10,500 / $11,500, whichever is the lower.
- For students in receipt of half remission under the SFAS, they will receive 75% support of the costs/fees involved in their overseas trips or the funding ceiling of the respective destination, i.e. $4,875 / $7,875 / $8,625, whichever is the lower.
- For general students, they will receive 50% support of the costs/fees involved in their overseas trips or the funding ceiling of the respective destination, i.e. $3,250 / $5,250 / $5,750, whichever is the lower.

24. Student trips supported by the QEF should have learning and teaching elements which should be relevant to school curriculum. QEF may provide top-up funding according to the principle set out in paragraph [23] to sponsor needy students to participate in educational visits, including those supported/organised by the Government and/or other organisations.

25. The QEF encourages the applicant to collaborate with other organisations on funding arrangements. The applicant is requested to provide detailed information on the subsidy, if any, from sources other than the QEF including the source(s), availability date and amount. More favourable consideration will be given to applicants with matching contribution.

26. Grantees of projects with approved grant exceeding $100,000 are required to submit audited accounts upon project completion and they could include the audit fees under this item. QEF will cover up to $5,000 of the audit fee for a project with approved grant of $1 million or less, and up to $15,000 for a project with approved grant exceeding $1 million.

27. Should the application be approved, the applicant should open and maintain with a licensed bank in Hong Kong a bank account for the sole purpose of keeping and transacting all monies of the Grant. For tertiary institutes, a separate ledger in the Grantee’s accounting system should be set up designated for the said purpose. Details could be found in the ‘Agreement Between the Permanent Secretary for Education Incorporated and the Grantee on Quality Education Fund’ on the QEF website (http://qef.org.hk). The Grant should be deposited to the designated account of the applicant bearing account names such as “ABC Primary School – QEF Account” and “XYZ Association – QEF Account”.

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Expected Project Outcomes

28. The applicant should state the expected tangible deliverables such as publications, websites and educational resources developed and/or intangible outcomes such as impact on learning.

29. If the project deliverables include a website or electronic books, the applicant may consider the feasibility of hosting the electronic deliverables on the school website or other professional educational portals such as the HKEdCity (www.hkedcity.net).

Project Evaluation

30. A self-evaluation model has to be included in each application. The applicant should set out the parameters for evaluating the effectiveness of the project. He/She should also specify a rigorous evaluation methodology as an integral part of the project design to facilitate internal evaluation and external validation of project effectiveness. A criterion-referenced, evidence-based approach to evaluation should be adopted. The focus should be placed on the outputs, expected outcomes, impact and effectiveness, including cost effectiveness. In addition, the application should have clearly designated indicators and measures of success along with the means by which relevant data will be collected. A recommended model and some useful reference materials are available on the QEF website(http://qef.org.hk).

Part C Details of Collaborating / Participating Organisations

31. Applicants should seek prior consent from the collaborating/participating schools and organisations for the project, and provide a list of collaborating / participating schools and organisations in the EPMS. The collaborating/participating schools and organisations are required to confirm collaboration/participation in the EPMS within 14 days from the date of submission of the application.

32. Applications will be processed upon receipt of confirmations from the collaborating/participating schools and organisations in the EPMS. Should no confirmation be made, the schools and organisations concerned will not be counted as valid collaborators/participants.

Part D Declaration

33. The head/person-in-charge of the applicant organisation should confirm the organisation’s eligibility for application and declare that all the information given in the application is true and accurate and there is no duplication of funding from other Government sources for the same activities. Should the application be approved, he/she is also required to pledge to participate actively in project promotion, publicity and dissemination activities in respect of his/her project.

34. All school applicants will be required to produce, upon approval of the project, documentary proof of endorsement by the School Management Committee / Incorporated Management Committee that the project aligns with the needs and development of the school and the project is supported by teachers.
Application

35. All applications should be submitted through EPMS on the QEF website (http://qef.org.hk).

36. Enquiries should be addressed to the QEF Secretariat
    Address: Room 403, 4/F, Cityplaza 3,
             14 Taikoo Wan Road, Hong Kong
             Hotline: 2921 8833
             Fax: 2186 8183
             Email: qefenq@edb.gov.hk

Quality Education Fund Secretariat
March 2016
Personal Information Collection Statement

Purpose of Collection

1. The personal data provided in the application will be used by the Quality Education Fund Steering Committee, its relevant sub-committees and the QEF Secretariat for the purpose of assessing applications to the Quality Education Fund. For successful applications, such data will also be used for project monitoring, promotion, publicity and dissemination purposes as appropriate.

2. The provision of personal data in the application is voluntary. The lack of certain information may affect the assessment of the application.

Classes of Transferees

3. Personal data provided in the application may be disclosed by the Steering Committee, if necessary, to the Education Bureau, other Government departments, expert reviewers, monitoring members of the projects and other people concerned.

Access to Personal Data

4. Applicants have the right to access and correct the personal data provided in accordance with sections 18 and 22 and Principle 6 of Schedule 1 of the Personal Data (Privacy) Ordinance. Their right of access includes the right to obtain a copy of their personal data provided in the application.

Enquiries

5. Enquiries concerning the personal data collected by means of the application, including access and corrections should be addressed to:

Quality Education Fund Secretariat
Room 403, 4/F, Cityplaza 3,
14 Taikoo Wan Road, Hong Kong

Tel: 2123 6090
Fax: 2186 8183
Website: http://qef.org.hk
Annex II(a)

Specific assessment criteria for applications
with grant sought not exceeding $150,000

Project Needs
1. School Needs/Development
   The needs of beneficiary school(s)/education sector should be identified and substantiated with evidence. The project should meet the identified needs and add value to school’s development.

2. Goals and Objectives
   The project goals should align with the identified needs / school’s development plan and Government’s education priorities. The objectives should be realistic and achievable, stating the beneficiaries, the attributes to be assessed and the target performance.

3. Innovation
   Innovative ideas or new practices to enhance, adapt, complement and/or supplement the existing practices that will facilitate the new development of schools to address the needs specific to their own contexts or the education sector to bring about positive capacity and / or impact on learning and teaching should be elaborated in the proposal.

Project Feasibility
4. Project Design
   The proposal should be supported by professional justifications or rationale, or conceptual framework reflecting evidence or insights from research and literature. There should be detailed and feasible implementation plan which includes specific timelines, modes of operation, target participants and personnel involved for the implementation. The proposed activities should be coherent with the stated objectives. The applicant’s readiness should be illustrated by relevant supporting documents, survey findings of stakeholders’ initial response and the availability of the required expertise and resources.

5. Staff Development
   The principal/teachers should play an active role in the project design, implementation and management. Apart from knowledge transfer, there should be evidence of collaboration, teamwork and sharing among teachers or other groups such as parents.

6. Budget and Commitment
   The budget should be commensurate with the expected project outcome and scale of the project, in line with the QEF pricing standards and all expensive items should be justified. The existing facilities and resources should be optimized to ensure cost-effectiveness.

Expected Project Outcome
7. Evaluation
   The proposed evaluation method should be concrete; the data to be collected and the method to analyze the collected data should be specified. The instruments and indicators used should be appropriate for the scale of the project and measuring the overall success in meeting the objectives of the project.
Annex III

Priority Themes for 2016/17

(1) Catering for Learners’ Diversity

Projects under this theme should aim at creating an environment or strategy conducive to quality education in catering for learners’ diversity to achieve the seven learning goals in the school curriculum, and enhancing students’ learning effectiveness in different Key Learning Areas (KLA), academic subjects, learning experience, and specific generic competencies such as thinking skills, creativity, communication, and self-management. Applicants may develop instructional packages, organise programmes / activities, adopt various teaching strategies or pedagogical innovations and provide support services to cater for students of different aptitude, interests, abilities and cultural background in schools, students with special educational needs (SEN), children newly arrived from the Mainland (NAC), non-Chinese speaking (NCS) children, cross-boundary students (CBS) and gifted / twice exceptional (2e) students, at class / group, school curriculum, school organisational, or systemic / school network level. The following examples are relevant:

- developing early identification tools and assessment for learning instruments for the target students (such as children with specific difficulties in learning Mathematics);
- developing school-based curriculum framework, strategies for implementation to meet the needs of target students including remediation, enrichment, facilitating transition from one key stage to another;
- developing school-based cross-disciplinary framework / approach in supporting students with diverse needs, including students with SEN and its application in schools;
- developing framework / programmes to cultivate an inclusive culture in schools through nurturing school staff, students and parents’ understanding and acceptance of the diverse needs of students, including those with SEN;
- developing effective communication channels and/or platforms with parents to enhance home-school co-operation and transparency of information in the support for students with SEN;
- exploring and trying out effective, interactive and differentiated learning and teaching approaches/pedagogical innovations for developing / promoting cognitive / academic / life/practical / social / higher order thinking skills and enriching student learning experiences outside classroom and provision of other learning experiences (OLE), etc., to suit the different learning styles, abilities, interests and needs for SEN, NAC, NCS and gifted / 2e students, etc.;
- develop lesson plan / curriculum materials / students notes & worksheets / assessment methodologies at different key learning stages for SEN, NAC, NCS and gifted / 2e students, etc.;
- designing remedial / developmental / preventive / intervention / enhancement / integration programmes and classroom / extra-curricular activities for the
target students; including developmental programmes on academic / cognitive / speech and language / literacy / numeracy / social-emotional skills for students at risk for learning difficulties and students with SEN, acceleration strategies and enrichment programmes for advanced learners and problem solving and life / social skills training for NAC, NCS, etc.;

- providing training or professional exchange programmes (class observation, collaborative lesson planning, co-teaching, etc.) for teachers to equip them with the necessary knowledge, skills and attitude to devise effective strategies / pedagogical innovations in enhancing the learning effectiveness of SEN, NAC, NCS and gifted / 2e students, etc.;

- organising learning activities / programmes (including educational exchange) for target students to enrich / reinforce their learning inside or outside classroom and to prepare the students to meet everyday living challenges, work life and adulthood, integrate into the lifestyle and culture of Hong Kong and foster a sense of belonging and to embrace different cultures (e.g. visits to museums, excursions);

- organising programmes (in particular in schools admitting a larger number of NCS students) for promoting awareness of cultural diversity with a view to exposing NCS students more to Chinese through interaction with their Chinese-speaking peers outside schools (for example, engaging NCS students in community services);

- enhancing competence of teachers / peer groups in collaboration with parents, non-government organisations and the community in providing support services to the target students;

- developing resource packages on curriculum and instruction / pedagogical innovations including use of information technology to develop computer-assisted learning resources and provide on-line learning to assist the target students;

- studying the model of ‘responsiveness to intervention’ and its application in regular classrooms;

- designing programmes / activities for the parents to equip them with the necessary knowledge and skills to enhance the learning effectiveness of the target students and to provide home training for them;

- developing school-based curriculum enrichment framework and strategies for class teaching in the subject of Chinese to meet the needs of NAC, NCS and CBS, such as teaching Chinese as a second language and using Cantonese as a classroom language; and

- organising programmes which may enrich these students’ learning experiences outside classroom and provision of OLE to enable the target students to integrate into the lifestyle and culture of Hong Kong and foster a sense of belonging to the territory, such as visits to museums, excursions to landmarks rich in cultural and historic representation.
(2) Effective Learning and Teaching of Languages

Projects under this theme should aim at enhancing the learning and teaching effectiveness of languages, including English Language, Chinese Language and Putonghua, strengthening the reading culture in schools, and catering for learner diversity to enhance students’ language proficiency and cultural competency for study, work and leisure with the help of innovative measures. The following examples are relevant:

- developing a school-based curriculum and devising effective learning, teaching and assessment strategies / resources to facilitate a smooth transition between key stages of learning, cater for learner diversity and improve learning and teaching effectiveness;
- developing diversified curriculum materials (printed or electronic) and making extensive use of a variety of text types and different language items and structures for meaningful communication and the authentic use of the language to support learning of students including NCS students and NAC who have different learning abilities, and to encourage creativity and promote self-directed learning;
- exploring pedagogical innovations or effective strategies for the use of e-learning resources in the language classroom to enhance students’ interest in learning, promote assessment for / as learning and cater for learner diversity;
- establishing a language-rich environment to support language learning and create opportunities for learners including NCS students to use the language for learning and communication both inside and outside the classroom by tapping community resources and providing diversified learning activities such as film appreciation, training camps, drama workshops, cultural tours, debates, study tours, and other pedagogical innovations;
- organising educational trips to provide opportunities for students to apply what they have learnt in the classroom in real-life situations;
- enhancing students’ language development strategies, in particular those beyond the stage of “learning to read”, collaboration skills and self-directed learning capabilities to promote learner independence and lifelong learning through strengthening a “reading to learn” culture and promoting “reading and writing across the curriculum” activities, as well as developing e-learning resources;
- fostering collaboration among teachers of different KLAs to develop strategies and implement curriculum plans to connect students’ learning experiences and promote the learning and teaching of Chinese / English across the curriculum in secondary schools;
- establishing networks among public sector schools, international schools and schools in the Mainland to build up mutual support network, provide opportunities for students, including NCS students and NAC, to exchange their learning experiences through the medium of English and Chinese;
- enlisting parents’ involvement (starting from kindergartens) in creating a home environment conducive to language learning and devising support programmes to foster parents’ understanding of their roles in their children’s language development;
• collaborating with non-government organisations and tertiary institutions to launch support services in the form of refresher courses, consultancy services, lesson studies etc. for teachers and students including NCS students and NAC and to develop intervention measures and evaluate the impact on learning and teaching outcomes;

• collaborating with tertiary institutions to conduct research to enhance our understanding of the cognitive and linguistic profiles of typical students, ethnic minority students and those with special educational needs, so as to shed light on the deployment of instructions conducive to their effective learning of languages; and

• sustaining Hong Kong as a Reading City through engaging school, family and community support in providing educational activities to enhance students’ language skills.

Note: Applicants can also apply for funding from the Language Fund for research and development projects; enhancing teachers’ professional development; providing school-based support; offering grant schemes and implementing various projects on language education, to cover different stages of education (i.e. pre-primary, primary, secondary, post-secondary) directed towards the enhancement in the use of the Chinese (including Putonghua) and English languages by the people of Hong Kong.
(3) Enhancing Learning & Teaching, and Assessment Literacy with a view to enhancing student learning outcomes in Primary General Studies, Key Learning Areas / Subject Curricula, and Liberal Studies

Projects under this theme should aim to explore both theory and evidence-informed/action research, innovative and effective learning/classroom strategies to enhance the quality of learning, teaching and assessment of new initiatives/latest curricula in both primary and secondary schools such as: -

- promoting understanding of the Belt and Road (B&R) Initiative through understanding the countries of the B&R in relevant curricula and/or cross-curricular activities to enhance the quality of learning and teaching in the initiative and in an effort to consider one’s role in contributing to it;
- promoting Science, Technology, Engineering and Mathematics (STEM) Education through collaborative projects that develop students’ ability to integrate and apply knowledge and skills within and across relevant KLAs, so as to foster their creativity and innovation;
- promoting Chinese history and culture through subjects in Primary General Studies; Personal, Social and Humanities Education, Chinese Language, Arts Education, Science Education, and other KLA as relevant;
- promoting learning to learn/thinking skills/self-directed learning/ information literacy across different KLA;
- consolidating knowledge foundation and values development in different KLA leading to exploring study or career interest in senior secondary subjects and the preparation of Liberal Studies;
- promoting Basic Law Education through KLA/subject curricula, values education, and Student Mainland Exchange Programmes; and
- promoting assessment literacy at school, KLA/subject and classroom level by using data/evidence provided by diversified internal assessment and external assessment (e.g. Territory-wide System Assessment) to inform more effective pedagogies in addressing student learning difficulties and achievements.
(4) Using e-Learning (IT) for Effective Learning

Projects under this theme should aim at promoting e-learning by making use of Information Technology (IT) and in combination with associated learning, teaching and assessment strategies, with a view to enhancing learning and teaching / pedagogical innovations, catering for learner diversity, and encouraging students’ pursuit of self-directed learning and life-long education. To allow students to reap the benefits of e-learning, applicants may propose developing school-based e-learning materials to cater for students’ learning needs, making good use of or enhancing the school IT environment to implement certain e-learning activities, trying out school-based e-learning resources and pedagogy, fostering capacity building among teachers, etc. To promote effective and ethical use of information and IT, applicants may propose measures to enhance information literacy and awareness on e-safety among students and parents. The following examples are relevant: -

- making use of IT (e.g. WiFi connectivity in school campus, online learning management system, cloud services, etc) to enable ubiquitous learning with school-based materials thus promoting self-directed learning; facilitate learning management at schools; and enhance assessment practices;
- developing school-based e-tools and e-resources (e.g. real-time, interactive and multi-media applications, etc) to promote interactive learning, enhance creativity and higher order thinking skills, and cater for learner diversity;
- generating sustainable model for the development and deployment of e-learning resources;
- generating sound e-learning pedagogical practices with appropriate integration into the school curriculum, such as blended learning, flip-classroom;
- nurturing e-learning school leadership and development of learning management system;
- networking schools for professional sharing among teachers on e-learning;
- organising guidance programmes for students to enhance their information literacy and awareness of e-safety, for example, against cyber bullying;
- undertaking study to explore the effectiveness of e-learning and innovative practices; and
- providing education programmes for guiding students and parents to face Internet addiction problems and empowering parents to guide their children to use IT properly.
Projects under this theme should aim at nurturing in students the values / attitudes of perseverance, self-respect, respect for others, responsibility, commitment, rule of law, justice, rationality, environmental conservation, integrity and care for others by integrating them with the school mission / aims of education and enhancing students’ independent thinking to enable them to make sophisticated, rational and responsible decisions. These would include programmes like life education, Basic Law education, environmental education, character education, moral education, ethical and religious education and the like. They can also help teachers to plan and guide students to develop OLE and students’ learning profiles, and to reflect on their personal, social, academic development and career planning starting from junior secondary level, so as to foster students to become positive and responsible citizens contributing to the betterment of the society, the country and the world. Special emphasis could be on the roles of class teachers in values education. The following examples are relevant:

- initiating and developing programmes to strengthen the whole person development of students through emphasizing the pastoral role of class teachers in primary and secondary schools;
- enhancing students’ resilience to face the challenges in personal, social, moral, academic and career development through original and creative programmes;
- developing innovative programmes, relevant cultural educational programmes and cross-boundary educational exchange programmes including the promotion of traditional and / or modern Chinese arts to strengthen students’ understanding of Chinese culture;
- conducting studies to understand students’ learning outcome in whole person development;
- broadening students’ understanding of the country’s development and culture via organizing cross-boundary educational exchange programmes;
- developing creative, effective and school-based programmes to enhance students’ capacity in the learning of the Basic Law and to facilitate their better understanding of the essence, content and implementation of the Basic Law in their daily life, study and future career;
- designing professional development programmes for teachers and schools / teachers network to enhance teachers’ capacity in the teaching of the Basic Law and the concept of “one-country, two systems” with a view to nurture students to care for the community, nation and the world;
- organizing research study to develop effective / innovative strategies for teaching and learning of values through the curriculum, developing facilities and organisation of learning experiences (e.g. Green Campus, energy conservation);
- organizing activities for students in values education and encouraging them to share with their peers, families and other members in the community their positive attitude and values through daily living, promotional campaigns, community services, etc;
- initiating and developing programmes to help parents (or in collaboration
with class teachers and schools) to cultivate positive values for younger generation;

- enhancing debriefing skills of teachers in their effective delivery of life-skills lessons in facilitating students’ sharing of feelings, concerns, insightful thoughts and practices from self-exploring and experiential learning;

- organising study tours for students to widen their exposure, enhance their sense of responsibility and teamwork and knowledge of different cultures to facilitate their independent thinking and enhance reflection abilities; and

- strengthening students' skills in saying 'no' to temptations and peer pressure, such as drug abuse, binge drinking, gambling, compensated dating, triad societies, etc.
(6) Creative Arts and Culture Education

Projects under this theme should aim to enhance students’ creativity, arts abilities and cultural literacy, as well as strengthen learning and teaching innovation of the arts. Examples are as follows:

- exploring effective, interactive, and innovative learning and teaching strategies and assessment strategies for enhancing creativity and critical thinking skills in the arts curriculum;
- using technologies effectively for creative expression and critical appreciation;
- nurturing creative talents and critical thinking abilities of students through arts learning programmes in collaboration with tertiary institutions;
- promoting creative arts education through a school-based, artist-in-residence programme with a view to developing students’ creativity, observation, expression, analytical and appreciation abilities, as well as inspiring arts teachers in their teaching and curriculum development;
- developing learning programmes and resource materials for understanding and appreciation of arts and cultural heritage of China and different countries such as those of the Belt and Road;
- developing learning programmes and resource materials through school visits and study trips for students and teachers with supportive / follow-up learning activities and/or curriculum;
- providing support for enhancing arts and culture education in schools such as organising training programmes for teachers; workshops on film appreciation, instrumental classes and bands for students, etc.; and
- developing school-based (or school network-based) OLE / Aesthetic Development programme that cultivates the whole school culture that is fond of learning the arts, in partnership with professionals and suitable organisations.
(7) Healthy Lifestyle and Positive Development of Students

Projects under this theme should aim at encouraging the education sector to achieve a comprehensive and wholesome lifestyle and supporting the developmental needs of students by a whole school approach. The following examples are relevant:

- adopting a whole school approach, with the involvement of parents if necessary, to design and implement learning programmes to cultivate students’ positive values, perseverance, resilience and positive outlook in life;
- improving school culture, creating a harmonious atmosphere conducive to healthy development of students to ensure school safety and protection of students against bullying and discrimination and school, and strengthening engagement of students of various background, including Newly Arrival Children (NAC), Cross Border Students (CBS), students with special educational needs (SEN) and Non-Chinese Speaking Students (NCS), etc., to their schools;
- strengthening the support systems of schools for students, such as enhancing the guidance support, reviewing the discipline policies and tailoring career education for their students, and training parents on parenting skills;
- enhancing students’ self-protection skills in facing various types of pressure in daily living, e.g. exam/study pressure, social pressure, breaking up of intimate relationships as well as coping with life challenges, developmental stages and critical incidents, such as transition to S1, child abuse, sexual assault, death of parents, etc. which may lead to the problems of student suicide, self-harm or mental problems;
- promoting the physical well-being of students including physical fitness, healthy diet and weight control and the fostering of students and parents’ proper perception of health;
- promoting mental health for all students including early detection and intervention of at-risk students, and appropriate care and support for students with mental health problems;
- developing students’ positive self-esteem as well as other important generic skills such as creativity and those interpersonal skills required for effective collaboration and communication; and promoting those values which the society deem essential for individual success, goal-setting, positive psychological wellbeing, social progress and harmony; designing and implementing programmes or activities (including educational exchange programmes) that cultivate a global perspective in the students;
- providing students and teachers with the opportunities to acquire learning experiences in different sectors of the society (commercial, legal, industrial, etc.) by consolidating the effectiveness of teaching and learning of Liberal Studies, a core subject under the New Secondary School academic structure and curriculum;
- creating a harmonious atmosphere for NCS students; and
- inculcating a positive attitude and value towards schooling among students through diversified learning support and comprehensive guidance programmes, so as to prevent the problem of non-attendance cases as well as hidden youth.
(8) Support for Students with Diverse Needs

Projects under this theme should aim at cultivating a caring and inclusive environment and helping students with diverse needs to attain all-round and healthy development through the provision of a harmonious and nurturing environment and student support programmes for students with SEN, gifted / 2e students, students with different cultural and ethnic backgrounds (including NAC, NCS children and CBS, students at-risk with mental health, behavioural, emotional or family problems, etc. The following examples are relevant: -

- developing and organizing programmes or activities on fostering supportive school ethos and whole school approach to cultivating a caring and inclusive school culture at school, grade, class and student levels; including programmes (such as remedial/ developmental/ preventive/ intervention) for students with different learning, emotional, social and behavioral needs and from different background;
- promoting Inclusive Campus to enhance students’ awareness and understanding on the needs of others especially those students with special needs, and disabilities. Whole school participation and joint schools activities especially pairing up of ordinary schools and special schools are encouraged;
- developing and organising school programmes / activities to enhance school-parent partnership in helping their children to attain all-round and healthy development;
- designing guidance programmes on mental health, affective education and psychological well-being, such as resilience, problem solving and life / social skills training to help these students to adapt to the life style and culture of the territory;
- designing programmes / activities to enhance the skills of students with mental health problems to cope with difficulties encountered in learning, social interaction, emotion and behavior management, etc.;
- networking schools, non-government organisations, tertiary institutions, professional bodies and the community to provide support programmes for the target students;
- enabling students to understand their own career/academic aspirations; develop positive attitudes towards work and learning; and integrate their career / academic aspirations with whole-person development and life-long learning for all students;
- devising in collaboration with business sector / community organisations a programme of balanced activities between theoretical knowledge / information and on-site practical training sessions to provide students with career-oriented experiences in terms of employment-related knowledge, skills and attitude as required from them in the future working life; and
- promoting an inclusive culture of understanding and respect among local parents, teachers and the community at large towards students with different cultural backgrounds / diversities.
(9) Promoting Whole Child Development in Kindergarten Education

Projects under this theme should aim at fostering children’s development in physical, cognitive, as well as personal, intellectual, social and aesthetic aspects; developing an integrated and balanced curriculum in promoting whole child development; and establishing a culture of mutual respect, sense of responsibility and independence within and across kindergartens. The following examples are relevant:

- facilitating the kindergarten sector to develop school-based curriculum to cater for the all-rounded development of children including language development;
- undertaking school-based studies to design effective learning and teaching activities/pedagogical innovations conducive to whole child development;
- developing learning through play programmes to enhance the learning motivation/interest of children while facilitating balance development;
- designing child-centred learning programmes to foster the development of self-awareness, self-esteem, independence and responsibility in young children;
- devising developmentally appropriate assessment systems in support of whole-child development in kindergartens;
- strengthening home-school co-operation and empowering parents to take a proactive and constructive role in working with teachers in promoting the whole-person development of their children;
- developing parent education programmes, resource packages and/or conducting researches on partnership with parents in promoting children’s learning and development;
- encouraging experience-sharing and sharing of teaching resources among kindergarten teachers in order to create professional learning communities for sustainable development in whole-child development;
- making use of information technology to develop learning and teaching resources for integrated learning activities to enhance quality of kindergarten education;
- providing support for NCS children, especially in learning Chinese and children with SEN to address their learning and developmental needs; and
- developing learning programmes with effective learning and teaching strategies to facilitate whole-child development of NCS children and creating a harmonious learning atmosphere and an immersed Chinese environment for the children.
(10) Supporting Effective School Management and Leadership

Projects under this theme should aim at helping schools / school sponsoring bodies (SSB) in the territory to adopt effective practices and systems on effective school management and leadership skills for facilitating continuous school improvement and long-term sustainability. They should also aim at assisting schools / SSB to further strengthen the school leaders’ capacity and administration skills, including knowledge on the deployment and management of different resources, managing daily operations, involving middle management in devising school development plans and budgets, devising succession plans, communicating with stakeholders and handling complaints. The following examples are relevant:

- enhancing the management, administration and leadership skills of school leaders through organising leadership training programmes, exchange visits, school-based mentoring programmes, experience sharing sessions, and programmes focusing on specific knowledge and skills required of school leaders, etc.;
- enhancing school’s administration and management through incorporating the good experience and practices identified by the project on strengthening schools’ administration management;
- cultivating good staff morale and sense of belonging through adopting practices of a good employer;
- enhancing schools’ awareness and capability in their optimal use of resources to promote all-round development of students;
- empowering the middle management to enhance effective communication and mutual understanding between school administration and staff for shared vision, mission and targets through various means such as organising team building programmes, developing middle managers' understanding of the rules and regulations which are related to school operation;
- enhancing efficiency and alleviating teachers’ administrative workload through effective organisational re-engineering, improving or streamlining relevant structures and work processes, appropriate tapping and deployment of resources and better use of information technology for facilitating school administrative work;
- developing a sound mechanism for effectively managing and deploying human and financial resources to address the key areas of concern delineated in the school development plan and annual school plan;
- developing work procedures and manuals which are reviewed regularly for all teaching and non-teaching staff, and reviewing and improving the management and control systems, internal guidelines, procedures and mechanism for school administration;
- promoting the sharing of experiences and knowledge on school management and leadership between local and overseas schools by organising educational exchanges;
- developing a sound financial resource management mechanism to address the financial resource requirements to achieve the aims of the key areas of concern delineated in the school development plan and annual school plan for the maximum learning benefits of students;
• assisting schools in setting up or fine-tuning channels of communication with various stakeholders (teachers and parents in particular) and helping schools to gauge the feedback from stakeholders in formulating various school policies, set up a transparent, fair and effective school-based enquiries/complaint handling mechanism based on the framework recommended by the Committee on Enhancement of Complaint Management in Schools, and enhance the capacity of teachers and frontline staff in handling enquiries/complaints;

• helping schools in devising and putting in place a strategic succession plan for long-term development of school leadership through early identification and support of high potential leaders so that they can undertake targeted leadership development and gain progressively greater leadership experience through new roles taken on within the school;

• adopting a whole school approach to cultivating a caring environment which emanates a culture of mutual respect and collaboration among stakeholders, such as the principal, teachers, parents and students;

• putting the concept of Planning-Implementation-Evaluation into practice by drawing up effective quality assurance mechanisms in different key aspects of school work in order to foster a self-evaluation climate for continuous improvement, sustainable development as well as enhanced accountability; and

• enhancing schools' capacity in crisis management.
Projects under this theme should aim at supporting schools to plan and devise strategies for promoting schools as learning organisations to facilitate teachers’ professional development and learning through a variety of ways. A balanced range of professional development programmes focusing on different breadth and depth of knowledge and skills, such as self-learning, action learning, tailor-made staff development programmes and attachments, could be arranged to cater for the development of teachers at different stages of professional maturity as well as the different roles and functions of teachers, e.g. form masters, counselling and career guidance teachers. They should also aim at creating space for teachers’ professional growth and adopting a whole school approach for enhancing the physical and emotional well-being of teachers. The following examples are relevant:

- catering for the general and specific needs of beginning teachers by formulating strategic plans for teacher induction and mentoring support;
- enabling teachers to maintain physical and emotional well-being to cope with responsibilities and boost their enthusiasm, optimism and commitment in education through arranging or organising related thematic programmes which, in addition to adopting a whole school approach, focus on heightening awareness of health and stress management as well as resolving conflict;
- widening teachers’ pedagogical repertoire and broadening their understanding of students’ needs at different developmental stages in support of student learning and development;
- creating space for teachers to explore and formulate effective strategies or innovative measures to address schools’ concerns;
- encouraging the professional development of teachers on effective, innovative and interactive learning and teaching strategies by drawing on experiences from other countries through organising educational exchanges;
- helping teachers achieve high levels of competence so that they can model effective instructional practices as well as student support services;
- helping teachers assume the leadership role in various aspects of school development through enhancing their knowledge and skills in areas such as personnel and financial management, crisis management and communication with different stakeholders;
- facilitating teachers and principals to understand the changing social and economic contexts so that they could better cater for students in developing different study and career pathways and meeting expectations of society through innovative means such as business attachment, inter-sector or international exchange;
- tailoring professional development plans at school, department and individual levels as well as promoting the reflective practice of teachers and learning cultures of schools through action learning, collaborative practice or learning communities; and
- formulating a teacher competencies framework to guide and facilitate the long term professional development of teachers.
**Annex IV**

(For Applications with Grant Sought Exceeding $150,000)

**Part B Project Summary**

<table>
<thead>
<tr>
<th>Project Title: <em>(Please fill in the blank)</em></th>
<th>Project Number</th>
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<td><em>(To be assigned by the EPMS)</em></td>
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**Name of Organisation:**

(1) Goals:

Objectives: (i)  
(ii)  
(iii)

(2) Targets:

Expected Number of Beneficiaries:

(3) Implementation Plan:

(i) Duration:
(ii) Process/Schedule:
(iii) Collaboration with other parties/partners:

(4) Products:

(i) Deliverables/outcomes:
(ii) Dissemination of deliverables/outcomes:
(iii) Commercialization potential of deliverables/outcomes:

(5) Budget:

All expenditure items should be grouped under at most six major budget items *(a) staff cost; (b) equipment; (c) services; (d) works; (e) general expenses; and (f) contingency* depending on the contents of the project proposal, and having regard to paragraphs [12 to 29] of the Explanatory Notes.

(6) Evaluation:

(i) Performance indicators:
(ii) Outcome measurements:
Annex V

Quality Education Fund
Application with Grant Sought Not Exceeding $150,000
Part B: Project Proposal

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Project Number</th>
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<td>(To be assigned by the EPMS)</td>
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Basic Information

Name of School / Organisation / Individual

Beneficiaries
(a) Sector: [ ] Kindergarten  [ ] Primary  [ ] Secondary  [ ] Special (Please tick)
(b) Students: _________ (in number)* and _________ (class level/age)*
(c) Teachers: ________________ (in number)*
(d) Parents: ________________ (in number)*
(e) Participating Schools (excluding applicant school): _____ (in number and types)*
(f) Others (please specify): ___________________________

* Please specify where appropriate

Proposal
(I) Project Needs
(a) Please state the aims of the project in clear and concise terms and elaborate how the proposed project could impact on school development.
(Example: To enhance students’ interests in reading through story-telling, singing, and drama...)

(b) (i) What are the areas of the needs and priorities of the school?
(Please tick the appropriate box(es).)
[ ] Enhance learning and teaching to facilitate students’ knowledge on subjects / learning areas / generic skills development
[ ] Promote students’ social and emotional development
[ ] Enhance school management / leadership and teachers’ professional development / wellness
[ ] Others (please specify) ___________________________
(ii) Please give background information to justify the demonstrated needs as mentioned in (b)(i).

(Please tick the appropriate box(es).)

☐ School development plan: ____________________________

☐ Survey findings: ____________________________

☐ Literature review summary: ____________________________

☐ Assessments on students’ performance: ____________________________

☐ Relevant experiences: ____________________________

☐ Others (please specify) ____________________________

(c) Please elaborate the innovative ideas or new practices to enhance, adapt, complement and/or supplement the existing practices that will facilitate the development of the school to address the needs specific to its own context.

(Example: Drama and music are effective means to stimulate students’ interest in reading and help develop their multiple-intelligences...)

(II) Project Feasibility

(a) Please describe the design of the project, including:

(i) Approach/Design/Activity

(Example: The project adopts the drama-in-education strategy and uses popular children songs to arouse students’ interest in reading in a fun and interactive way...)

(ii) Key Implementation Details

Project period: (month/year) to (month/year)

<table>
<thead>
<tr>
<th>Month / Year</th>
<th>Content / Activity / Event</th>
<th>Target Beneficiary/Participants</th>
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- 2 -
Please explain the extent of teachers’ and/or principal’s involvement and their roles in the project.

(i) Number of teachers involved and degree of input (time, types, etc.):

(ii) Roles of teachers in the project: *(Please tick the appropriate box(es).)*
- [ ] Leader
- [ ] Co-ordinator
- [ ] Developer
- [ ] Service recipient
- [ ] Others (please specify) ________________________________

(c) Please provide the budget of the project and justify the major items involved.

**Grant Sought: HK$____________________**

<table>
<thead>
<tr>
<th>Budget Item*</th>
<th>Expenditure Detail</th>
<th>Justifications</th>
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<tr>
<td></td>
<td>Item</td>
<td>Amount ($)</td>
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<tr>
<td>i) Staff</td>
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<td>ii) Service</td>
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<td>iii) Equipment</td>
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<td>iv) Works</td>
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<td>v) General expenses</td>
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<td>vi) Contingency</td>
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**Total Grant Sought ($):**

* Please cross out as appropriate
(III) Expected Project Outcomes

(i) Please describe how to evaluate the effectiveness of the project;
(Please tick the appropriate box(es).)

☐ Observation: ____________________________________________________________

☐ Focused group interviews: ________________________________________________

☐ Pre-and post-activity surveys: _____________________________________________

☐ Performance change of students in assessment: ______________________________

☐ Others (please specify) _________________________________________________

(ii) Please state the project deliverables or outcomes.
(Please tick the appropriate box(es).)

☐ Learning and teaching materials
☐ Resource package
☐ DVD
☐ Others (please specify) _________________________________________________