



**STANDING COMMITTEE ON
LANGUAGE EDUCATION AND RESEARCH
語文教育及研究常務委員會**

**English Alliance
2023/24 and 2024/25**

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Guide to Proponents
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Language Education and SCOLAR Section, Education Bureau

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(Updated in December 2022)

Standing Committee on Language Education and Research

English Alliance 2023/24 and 2024/25

Guide to Proponents

Proponents shall read this Guide carefully in preparing their application(s). Each application shall include the following: 1) An **application form** with ALL parts completed and supported by documents wherever required and 2) a **proposal** (maximum 10 pages of A4 paper) to elaborate on details of the project.

1. INTRODUCTION

1.1 Standing Committee on Language and Education Research

Standing Committee on Language Education and Research (SCOLAR) was established in 1996, to advise the Government on language education issues in general as well as the use of the Language Fund (LF). Since its establishment, with a view to enabling the people of Hong Kong, particularly students and working adults, to become biliterate (in written Chinese and English) and trilingual (in Cantonese, Putonghua and spoken English), SCOLAR, through the use of the LF, has complemented and supplemented the efforts of the Government, other advisory bodies and stakeholders by funding and implementing various initiatives.

1.2 English Alliance

The English Alliance, a territory-wide English project launched by SCOLAR in the 2008/09 school year, aims at arousing students' interest in English language learning and improving their English language exposure and use through a wide range of English language activities.

2. APPLICATION DETAILS

2.1 Eligibility

2.1.1 The proponent must be:

- a body corporate either incorporated or registered under the Companies Ordinance (Cap. 622),
- a charitable institution or trust of a public character recognised under Section 88 of the Inland Revenue Ordinance (Cap. 112), or
- a tertiary institution, a society or an organisation (excluding primary schools and secondary schools) registered under the Laws of Hong Kong¹.

2.1.2 The proponent must have proven track records of organising English language activities / programmes.

¹ Examples of the Laws of Hong Kong include Societies Ordinance (Cap. 151), Education Ordinance (Cap. 279), Post Secondary Colleges Ordinance (Cap 320), etc.

2.2 Project Period

- 2.2.1 The two-year project period shall begin in the 2023/24 school year and end in 2024/25 school year (i.e. between September 2023 and August 2025), including publicity and enrolment of participants.

2.3 Funding

2.3.1 Funding Cap

There is no funding cap for a proposed project. The amount of approved funding for each project is considered on its own merit and depends on justifications of the budget and availability of resources.

2.3.2 Other Funding

The proponent shall provide details on other funding sources (if any) at the time of application. If the proposed project receives **any other public funding** from the Government of the Hong Kong Special Administrative Region, the **relevant proposal will not be considered**.

2.4 Project Requirements

- 2.4.1 The target participants shall be students and teachers of local primary and secondary schools.

- 2.4.2 English Alliance 2023/24 and 2024/25 will be themed on **“Authentic and Creative Use of English”**, with emphasis on improving students’ English proficiency through exposure in authentic and creative contexts; building students’ confidence in using the language as well as offering an enjoyable and meaningful English learning experience.

- 2.4.3 The proposed projects shall:

- be educational, creative, meaningful and pleasurable;
- maximize participants’ use of English language skills;
- enrich and extend participants’ English language learning experience in authentic contexts; and,
- promote appreciation of English-speaking cultures;

- 2.4.4 Priority would be given to projects which:

- provide participating schools with activity plans, materials or resources for extended activities or guidelines on replicating the proposed projects;
- provide a series of activities instead of single ones;
- foster interschool partnerships such as providing opportunities for cross-school dissemination of good practices, showcasing students’ learning outcomes and enhancing professional development of teachers; and
- focus on one or more of the following areas:
 - a. promoting language arts;
 - b. providing Applied Learning (ApL) experiences (e.g. animation / fashion design, fitness, western cuisine, multimedia storytelling);
 - c. encouraging cross-disciplinary learning (e.g. STEAM, sports, Reading / Language across Curriculum (RaC / LaC));
 - d. promoting positive values and attitudes; and
 - e. developing generic skills (e.g. collaboration, critical thinking).

- 2.4.5 The proposed project shall be non-profit-making in nature and must not include any profit-making activities.
- 2.4.6 The proposed project shall not be used for political, religious, commercial publicity or raising funds for any individuals or organisations.
- 2.4.7 The proposed project shall be able to cater for students of different learning needs and language proficiency. Graded materials shall be provided to participants when necessary.
- 2.4.8 The proponent may incorporate public sessions in the proposed project for community participation where appropriate.
- 2.4.9 The proponent may collaborate with local or overseas partner(s) to implement the project. For a joint application, the proponent shall be the lead organisation and be responsible for the project.
- 2.4.10 The proponent must appoint a Project Leader who has expertise and experience in planning and organising English educational activities / programmes as well as knowledge in project management, quality assurance and other relevant support services.
- 2.4.11 The proponent must appoint a Language Advisor with expertise and experience in English language education to help map out the language learning elements and monitor the learning and teaching effectiveness of the proposed project, including reviewing teaching plans and project materials.
- 2.4.12 The proponent should take into account the potential challenges posed by COVID-19 when devising the activities. The proponent is required to propose alternate plans taking into account COVID-19 (e.g. whether the proposed activities could be flexibly delivered by alternate modes such as online or non-physical means; or whether there is room for rescheduling the proposed activities within the proposed project period).
- 2.4.13 From 2023/24 school year onwards, enrolment of participants shall be conducted by the project partners. Project partners shall promote the approved projects to ALL eligible schools taking note of the proposed activity schedule and the local school calendar. The exercise shall be conducted in an open and fair manner and enrolment criteria shall be set out clearly in advance. In case of excess demand, project partners may impose certain selection criteria such as drawing lots or on first-come-first-served basis.
- 2.4.14 A practical publicity strategy for promotion and enrolment of participants shall be included in the proposal and the budget. The purpose, scale and effectiveness of each publicity item should be clearly set out. The proponent shall make good use of technology and new media in devising the publicity and enrolment strategy to enhance the effectiveness.
- 2.4.15 Project partners are encouraged to produce a short promotional video or slide show of up to three minutes to introduce the approved English projects to interested schools / students. The introductory video or slide show will be uploaded to SCOLAR website for publicity.

2.5 Showcasing of Project Outcomes

- 2.5.1 Upon completion of the project, project partners shall produce a short video of up to three minutes to showcase the project outcomes. Video content could include highlights of activities and events, students and teachers' sharing, adjudicators' comments, students' works, etc.
- 2.5.2 Project partners shall provide relevant project materials (such as teaching kits, videos and photos of events, students' works in digital format, etc.) to SCOLAR Secretariat for showcasing and dissemination purpose.
- 2.5.3 Project partners shall participate and support SCOLAR's annual showcasing event(s), such as inviting participants to attend and share their learning experiences and outcomes; providing additional workshop / seminar for demonstration purpose; producing promotional videos for sharing, as well as assisting in any relevant work as and when requested by the SCOLAR Secretariat.

2.6 LF Agreement

- 2.6.1 The proponent is required to enter into a standard LF Agreement with the Trustee of LF upon acceptance of the funding support for the proposed project.

3. FINANCIAL MANAGEMENT

3.1 Budget

- 3.1.1 All expenditures must be exclusively used for the proposed project and incurred within the project period (i.e. between September 2023 and August 2025). The proponent should submit a detailed budget with justifications.
- 3.1.2 The budget shall be prepared in a realistic and cost-effective manner. Item descriptions that are too brief and without justifications may not be accepted.
- 3.1.3 Depending on the content of the proposed project, expenditure items should be grouped under the following categories:
 - (a) staff cost;
 - (b) activity cost;
 - (c) publicity expenses;
 - (d) general expenses;
 - (e) contingency; and
 - (f) administrative overhead (for UGC-funded institutions only).
- 3.1.4 For proposals submitted by tertiary institutions funded by the University Grants Committee that incur administrative charges (usually known as administrative overhead), the institute may include the charges in the budget together with details and justifications. In general, such charges should not be more than 15% of the total budget, exclusive of

contingency, to cover the expenditure that is directly related to the proposed project. Where the proposed activities are conducive to the proponent's own activities and / or intermediary organisations' and may bring benefits to them, the proponent should absorb part of the administrative charges.

- 3.1.5 To promote the proposed project, the proponent must submit a publicity budget with breakdown and justification for each item. The proponent shall indicate whether the publicity would involve self-owned platform(s), and if so, the budget allocated to publicise on self-owned platform(s) shall not exceed 20% of the total budget of the proposed project².
- 3.1.6 The project partner will be required to submit audited accounts after completion of the project according to the terms and conditions as set out in the LF Agreement and relevant guidelines. A maximum of HK\$12,000, HK\$14,000 and HK\$20,000 of audit fees charged by an independent certified public accountant for preparation of the auditor's reports for projects with grant less than HK\$1 million, between HK\$1 million and HK\$5 million and more than HK\$5 million respectively may be included in the budget.
- 3.1.7 The proponent shall include a contingency in the proposed budget for covering any unexpected minor expenses. The contingency shall not exceed 5% of the total budget (exclusive of the contingency).

3.2 Procurement

- 3.2.1 The purchase of goods and services shall be conducted in an open, fair and competitive manner and in line with the "General Guidelines on Procurement" (uploaded on SCOLAR website: scolar.gov.hk). Relevant quotation documents and transaction records shall be properly kept and submitted to SCOLAR Secretariat together with the financial reports.

3.3 General Principles for Allowable and Unallowable Costs

- 3.3.1 Proponents should refer to the General Principles for Allowable and Unallowable Costs set out at **Annex I** when preparing the budget. The principles are for general guidance only. The SCOLAR Secretariat has the discretion to determine the amount of funding, having regard to the circumstances of each individual case.

3.4 Schedule of Grant Disbursement

- 3.4.1 Funding support is normally given as a grant and disbursed by instalments. Instalments of grant will only be disbursed if relevant requirements as stipulated in the LF agreement are satisfied.

4. MONITORING AND EVALUATION MECHANISM

4.1 Monitoring of Project Materials

- 4.1.1 The logos of SCOLAR and LF shall be suitably included in all project materials (i.e.

² Special consideration shall be made if full justifications with supporting information are provided for exceeding the 20% budget cap.

publicity materials, teaching and learning materials, etc.) as acknowledgement.

- 4.1.2 All draft project materials (i.e. publicity materials, teaching and learning materials, etc.) shall be sent to the SCOLAR Secretariat for approval at least one month before production.

4.2 Submission of Reports and Observation Visits

- 4.2.1 Project partners are required to submit progress reports and interim financial reports on a regular basis during the project period, and an end-of-project report and a final financial report within three months upon completion of the approved projects. The final financial report shall be accompanied by the audited accounts and an agreed-upon procedures report prepared by an independent certified public accountant declaring that all expenses incurred fall within the scope of LF grant, and in line with the Clauses specified in the LF Agreement.
- 4.2.2 All approved projects are subject to supervision and evaluation of the SCOLAR Secretariat via review of progress reports, end-of-project report and financial reports as well as SCOLAR Secretariat's observation visits of project activities.

4.3 Evaluation

- 4.3.1 The proposed English project shall be evaluated on its effectiveness in achieving the theme and objectives of English Alliance 2023/24 and 2024/25.
- 4.3.2 Project partners are required to conduct self-evaluation of their approved projects and collect both quantitative and qualitative feedback from participating teachers and students for assessment of project effectiveness. Detailed design, work plan and methodology of the evaluation, including measurable outcomes, performance indicators and the use of quantitative and qualitative approaches, shall be included in the proposal.
- 4.3.3 Details of the evaluation result shall be reported in the progress / end-of-project reports according to the time frame set out in the LF Agreement.

5. ASSESSMENT MECHANISM

5.1 Assessment Process

- 5.1.1 The SCOLAR Secretariat will conduct preliminary vetting and submit the qualified proposals to the vetting panel composed of SCOLAR Members for further assessment. Proponents may be invited to present their proposals to the vetting panel if necessary. Assessment results will be announced in the third quarter of 2023 tentatively.
- 5.1.2 All proposals will be assessed on individual merits. SCOLAR reserves the rights to accept, reject or request modifications to selected proposals.

5.2 Assessment Criteria

5.2.1 The assessment criteria are as follows –

- (a) Project objectives
 - the relevance of the proposed projects, in particular, whether they could tie in with the vision and mission of SCOLAR as well as the theme and objectives of English Alliance
- (b) Project content
 - the depth and concreteness of the project contents
 - the effectiveness in developing students' interest and confidence in using the language
 - the appropriateness of the proposed activities
 - the sustainability of project outcomes
- (c) Project structure and management
 - the scale of the proposed project
 - the suitability and feasibility
 - the proposed number and types of direct beneficiaries
 - the expertise and experience of the project leader and language advisor
 - the effectiveness of the publicity and enrolment strategy
 - the effectiveness of evaluation methodology and tools
- (d) Cost-effectiveness
 - whether the budget is prudent, realistic and fully justified
- (e) Capacity of the proponent
 - the background, governance structure, track record as well as past performance of the proponents in organising language activities / programmes, including previous SCOLAR projects

6. OTHER POINTS TO NOTE

6.1 Staff Administration

Project partners shall ensure openness and fairness in staff recruitment and manage conflict of interest according to the “General Guidelines on Staff Administration” (uploaded on SCOLAR website: scolar.gov.hk).

6.2 Intellectual Property Rights

All learning and teaching materials, promotional materials, publications and audio/visual materials relating to the projects shall not infringe copyright or Intellectual Property Rights. SCOLAR shall have the right to use, duplicate and disseminate all project materials developed.

6.3 Sexual Conviction Record Check

Project partners should take note of Education Bureau Circular No. 7/2021³ and request

³ Education Bureau Circular No. 7/2021 is accessible on Education Bureau's webpage: <https://applications.edb.gov.hk/circular/upload/EDBC/EDBC21007E.pdf>

appointed tutors/facilitators/coaches to undergo the Sexual Conviction Record Check (SCRC) operated by the Hong Kong Police Force where appropriate.

6.4 Liability

SCOLAR shall not be responsible for any financial loss of the project partner in connection with the provision of the proposed project. SCOLAR does not accept any responsibilities for claims, demands or liabilities arising from the approved project. The project partner shall take out appropriate liability insurance for the project concerned (such as public liability insurance).

7. SUBMISSION OF APPLICATION

7.1 The proponent **MUST** submit:

- (a) **a completed application form** (in duplicate);
- (b) **a proposal**⁴ (maximum 10 pages of A4 paper) (in duplicate);
- (c) **a copy of the organisation's registration document** (For charitable organisations, also a copy of the letter issued by Inland Revenue Department for tax exemption under section 88 of the Inland Revenue Ordinance); and
- (d) **a USB flash drive / SD card / DVD / CD-ROM**⁵ containing an identical soft-copy of 7.1(a) the application form and 7.1(b) the proposal **in MS Word format**, as well as the documents in 7.1(c) above **in PDF or JPG format**.

7.2 Applications shall be submitted in person or by post / courier to:

**Language Education and SCOLAR Section, Education Bureau
Room 1702, 17/F, Skyline Tower
39 Wang Kwong Road, Kowloon Bay, Kowloon
(Attn: ExO(P))**

Office Hours:

Monday to Friday	8:30 am to 1:00 pm; 2:00 pm to 6:00 pm
Saturday, Sunday and Public Holiday	Closed

7.3 Application deadline: 12:00 noon on 3 February 2023 (Friday). (For postage, date on postmark shall not be later than the closing date.)

7.4 In case the Black Rainstorm Warning Signal or Tropical Cyclone Warning Signal No. 8 or above is in force for any duration between 8:30 am and 12:00 noon on the application closing date, the application closing time will be extended to 12:00 noon on the next working day.

7.5 Late submissions will not be considered. Applications by fax, e-mail or other electronic means will not be accepted.

⁴ The proponent shall make reference to the "Checklist of items to be included in the proposal" at **Annex II** and ensure all information required are included in the proposal before submission.

⁵ USB flash drive / SD card / DVD / CD-ROM submitted to the LE & SCOLAR Section for the application will **NOT** be returned to the applicant.

- 7.6** Supplementary documents and information may be requested from time to time for processing the application. Failure to provide such information on time will lead to termination of your application without further notice.
- 7.7** All submitted applications and supplementary documents will not be returned.
- 7.8** Proponents will be informed of the result in writing in the third quarter of 2023. SCOLAR's decision is final. The decision on the funding to be granted rests with SCOLAR. Unsuccessful proponents, however, may submit a fresh application for the next cohort.

8. ENQUIRIES

For enquiries, please contact the SCOLAR Secretariat at 3153 4283 / 3527 0167 or visit the SCOLAR's website at scolar.gov.hk.

**Language Education and SCOLAR Section
Education Bureau
December 2022**

**Language Fund
Principles for Allowable and Unallowable Costs for
English Alliance**

Introduction

This document aims at assisting the proponents in considering whether the cost of an item is allowable under the Language Fund (LF) Grant as well as the extent thereof.

Target Beneficiaries

2. The LF Grant shall only be used for the agreed target beneficiaries.

General Principles

3. The general principles for determining allowable costs for a LF project are listed below:
 - (a) The cost is in accordance with the terms and conditions stipulated in the LF Agreement.
 - (b) The cost is incurred within the ambit and the scope of the approved budget.
 - (c) The cost is incurred within the project period.
 - (d) The cost is necessarily incurred for the purposes for which the LF Grant is provided.
 - (e) The cost is reasonable and accords with the principles of sound financial management, in particular in terms of value for money and cost-effectiveness.
 - (f) The cost is actually and provably spent. It is adequately documented by accounting records and documents such as vouchers, invoices, receipts, payroll records, timesheets, etc.

Common Allowable Costs

4. Expenses which mainly are Staff Cost, Activity Cost, Publicity Expenses and General Expenses **will normally be considered, depending on the circumstances of each individual case.**
5. Examples of allowable items include –
 - (a) language-related activities, including but not limited to opening ceremony, rounding up the completion of a project, seminars, workshops, exhibitions;
 - (b) educational materials (e.g. educational booklets or digital resources);
 - (c) allowances for voluntary helpers;
 - (d) insurance for public liability;

- (e) travelling expenses (except items listed in clause 7(k) below);
- (f) fees for instructors/speakers;
- (g) publicity (e.g. promotional materials, certificates for volunteers); and
- (h) audit fees charged by an independent certified public accountant for the preparation of auditor's reports for projects, with the maximum amount of sponsorship as indicated below:

<u>Overall expenditure of the approved project</u>	<u>Maximum amount of sponsorship</u>
less than \$1 million	\$12,000
between \$1 million and \$5 million	\$14,000
more than \$5 million	\$20,000

Common Unallowable Costs

- 6. Grantees shall finance the unallowable costs from non-LF sources.
- 7. Examples of unallowable items include –
 - (a) expenses for building facilities (including office and accommodation)
 - *expenses for rates, office rental, building management fee, renovation, operation, repair and maintenance, etc.;*
 - (b) business set up cost
 - *expenses on the formation or establishment of a limited company or organisation;*
 - (c) entertainment expenses
 - *costs associated with any type of entertainment and related incidental expenses;*
 - (d) equipment and maintenance cost
 - *purchase of furniture and/or equipment, such as computer, video equipment items, etc.*
 - *maintenance costs for equipment such as computer, video equipment, etc.;*
 - (e) food cost
 - *food of any kind such as snacks, beverages, refreshments, meals for project staff;*
 - (f) insurance premiums
 - *insurance premiums not directly related to the project such as travel insurance, employees' compensation insurance, directors' and officers' liability insurance, etc.;*
 - (g) penalties and fines;
 - (h) personal expenses

- *expenditures on goods and services for private purposes;*
- (i) unallowable staff cost
- *salary increment to project personnel*
 - *fringe benefits for staff (e.g. education allowance, medical insurance, housing allowance, etc.)*
 - *severance payment and untaken leave of staff employed*
 - *gratuities*
 - *allowances other than employer's contribution to the mandatory provident fund;*
- (j) cost for stored value card
- *costs for acquiring and/or adding value to stored value card such as octopus, phone card;*
- (k) unallowable travelling expenses
- *project staff's travelling expenses between home/accommodation and workplace*
 - *excess travelling expenses, i.e. amount over the cheapest reasonable form and route of public transport*
 - *costs for travel documents (e.g. passport costs) and related expenses (e.g. visa fees);*
- (l) utility
- *expenses such as charges for electricity, gas, water, telephone (fixed line or mobile), fax, internet access, etc.; and*
- (m) unrelated administration costs
- *general administration and expenses not directly related to the project, exclusive of administration overhead charges by University Grants Committee (UGC)-funded institute.*

Handling of Unallowable Costs

8. Expenditure on unallowable items that cannot be charged to the LF Grant shall be borne and financed by the Grantees/non-LF sources.

9. For any uncertainty on whether an expense should be charged to the LF Grant, written clarification shall be sought from the Language Education and SCOLAR Section. Language Education and SCOLAR Section may at its sole discretion determine whether the expenses concerned should be charged to the LF Grant or not.

Checklist of items to be included in the proposal

- Information, including name and contact details, of the proponent and partner(s) (if any)
- Name, contact information and curricula vitae of the person-in-charge of the proposal and the Project Leader, including experience and track record in planning and organising English language activities / programmes
- Name and curricula vitae of the Language Advisor (if Language Advisor has yet to be appointed, the proponent shall state the requirements on qualifications and experience for appointing the Language Advisor in detail)
- Information of the tutors / facilitators / coaches of the proposed project, including the number, their academic qualifications, experience in conducting English language activities and/or English language teaching experience
- The minimum and maximum numbers of participants in each proposed activity
- Project title, concept of design, project content, expected learning outcomes / deliverables of the proposed project and how the theme will be met
- A detailed project time frame, duration and schedule of the proposed activities
- Cost and budget breakdown of the (i) proposed activities under normal circumstances; and (ii) alternate plan taking into account the impact of COVID-19
- List of expenditure items grouped under staff cost, activity cost, publicity expenses, general expenses, contingency, and administrative overhead (if applicable)
- An evaluation plan setting out the design, work plan and methodology in detail, including measurable outcomes, performance indicators and the use of quantitative and qualitative approaches
- A practical publicity strategy for promotion and enrolment of participants with cost and budget breakdown for all publicity items
- Production plan of the showcasing video with relevant production cost included in the budget
- Any other relevant information in support of the application