



SCOLAR
語常會

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

**Research and Development Projects
2024-25**

—————◆—————
Guide to Applicants
—————◆—————

Language Education and SCOLAR Section, Education Bureau

Address: Room 1702, 17/F, Skyline Tower
39 Wang Kwong Road
Kowloon Bay, Kowloon

Tel : 3156 1248

Fax : 2801 7732

(Latest version in April 2023)

Standing Committee on Language Education and Research

Research and Development Projects 2024-25

Guide to Applicants

Applicants must read the Guide to Applicants carefully in preparing applications. All parts of the application form must be completed with supporting documents wherever required. The English version shall prevail whenever there is any discrepancy between the English and Chinese versions.

Contents

1	Introduction	<u>Page</u>
1.1	Standing Committee on Language Education and Research (SCOLAR)	4
1.2	Research and Development Projects	4
1.3	Priority Themes for the Call for Applications of Research and Development Projects 2024-25	5
2	Guide to Application	
2.1	Eligibility	6
2.2	Quotas of Applications	7
2.3	Type and Mode of Research and Development Projects	7
2.4	Project Duration	7
2.5	Funding	8
3	Assessment Mechanism	
3.1	The Vetting Committee	11
3.2	Assessment Criteria	12
4	Monitoring and Dissemination	
4.1	Submission of Reports and Deliverables.....	14
4.2	Presentation and Dissemination of Results.....	15
5	Intellectual Property Rights and Use of Results	16
6	Notes to Applicants	
6.1	LF Agreement	17
6.2	Schedule of Payment	18
6.3	Procurement	18
6.4	Management of Approved Grants.....	18
6.5	Audit Requirement.....	18
6.6	Change(s) of Approved Project.....	19
6.7	Insurance.....	19
6.8	Publications, Promotional Materials and Dissemination.....	20
6.9	Invitation to SCOLAR.....	20
7	Right of SCOLAR	20
8	Submission of Application	20
	Annex I: Principles for Allowable and Unallowable Costs	23
	Annex II: Handling of Information and Personal Data Contained in Research and Development Projects Application	29

1. INTRODUCTION

1.1 Standing Committee on Language Education and Research (SCOLAR)

The vision of the Standing Committee on Language Education and Research (SCOLAR hereafter) is to enable the people of Hong Kong, in particular, students and working adults, to become biliterate (in written Chinese and English) and trilingual (in Cantonese, Putonghua, and spoken English).

Since the establishment of the Language Fund (LF hereafter) in 1994, SCOLAR has, through the use of the LF, complemented and supplemented the efforts of the Government, other advisory bodies and stakeholders by funding and implementing research and development projects on language learning and language education issues, enhancing professional development of Chinese language and English language teachers, providing school-based support on Chinese language and English language education, and creating a facilitating language environment for our students as well as in the community.

1.2 Research and Development Projects

Research and development projects have played an important role in facilitating effective language education policy formulation and implementation to keep up with the latest demographic, societal and economic developments as well as educational needs of Hong Kong people. To sustain the efforts and accomplishments, SCOLAR will continue to fund, through the use of the LF, research and development projects tapping the wider pool of research expertise in the local and international arena on specific themes which are of strategic importance to the language and language education development of Hong Kong.

With a view to supporting the implementation of various initiatives on language learning and teaching in local schools and generating new knowledge or filling gaps for pedagogical applications in local context, SCOLAR will identify priority themes for the research and development projects whereas the actual topics or areas, and scope and duration will be

proposed by applicants.

1.3 Priority Themes for the Call for Applications of Research and Development Projects 2024-25

The priority themes identified for the call for applications are listed below. Examples of possible research and development focuses/areas are given as appropriate. All applications must be made under one of the following themes –

- (a) Chinese or English language learning and teaching at different key educational stages, for example,
 - *Holistic planning, implementation and evaluation*
 - *Technology-enhanced Chinese (including Putonghua) or English language pedagogy*
 - *Cross-curricular Chinese or English language learning*
 - *Reading Across Curriculum (RaC) or multimodal reading*
 - *Chinese language (including Putonghua) pedagogy to cater for diversified needs of learners*
 - *Learning of Chinese language of non-Chinese speaking (NCS) learners*

- (b) Interface between key educational stages in Chinese or English language learning and teaching, for example,
 - *Chinese or English language learning and teaching across kindergarten education and Key Stage One*
 - *Chinese or English language learning and teaching across Key Stage Two and Key Stage Three*
 - *Chinese or English language learning and teaching across secondary education and post-secondary/tertiary education*

- (c) Chinese language learning or English language exposure of learners in early years, for example,
 - *Emergent literacy skills of young learners*
 - *English early writing development of young children*
 - *Support for parents/care-givers of young children on language development/learning of young children*
 - *Home literacy environment and language development/learning*

of young children

- *Out-of-school literacy development or language learning of young learners*

(d) Chinese (including Putonghua) or English language use and proficiency of working adults, for example,

- *Multimodal literacy in the workplace*
- *Workplace English as a lingua franca*
- *Use of Putonghua of working adults in the workplace*

The themes are by no means mutually exclusive. Interrelated themes will also be considered.

2. GUIDE TO APPLICATION

2.1 Eligibility

2.1.1 The Principal Investigator (PI hereafter) as an Applicant of Research and Development Projects 2024-25 must be an **academic¹ of a local registered organisation², statutory body or recognised community organisation³, and specialised in teaching and/or research of language/language education.**

2.1.2 Collaborative research across local institute(s) or with international partnership(s) is strongly encouraged. Co-Investigator(s) (Co-I(s) hereafter) can either be local or international academics and/or professionals.

2.1.3 Each application must be submitted with **ONE PI** who shall be the project leader of the project and shall be responsible for the ownership and overall development, management and monitoring

¹ In the context of a university or post-secondary college, an academic generally refers to a member of the full-time teaching staff.

² Registered organisations include bodies/schools registered under the Societies Ordinance, the Companies Ordinance or the Education Ordinance, etc.

³ Recognised community organisations include charitable bodies that are eligible for tax exemption under the Inland Revenue Ordinance.

of the proposed research and development project whereas there is no limit on the number of Co-Is who develop and manage the project with the PI.

- 2.1.4 The proposed project shall mainly be undertaken in Hong Kong.
- 2.1.5 The expected findings/outcomes of the proposed project shall **facilitate knowledge transfer between academics, as well as between academics and frontline practitioners, and thereby enhancing language education and research in Hong Kong.**
- 2.1.6 The proposed project shall not duplicate any projects that the Government is undertaking or about to undertake; nor shall it duplicate funding for similar projects from other Government sources.

2.2 Quotas of Applications

- 2.2.1 An applicant is allowed to submit **only one** application in the capacity of PI.
- 2.2.2 There is no restriction for the PI to be involved in other applications in the capacity of Co-I concurrently. Applicants must ensure that they are eligible and have the capacity to satisfy the requirements of all the projects that they hold and/or engage in.

2.3 Type and Mode of Research and Development Projects

Applicants are welcome to propose any type and/or mode of appropriate, innovative research and development projects that shall be **applied research with a primary goal of addressing educational issues of different educational levels.**

2.4 Project Duration

- 2.4.1 The proposed commencement date of the proposed project shall be between 1 September 2024 and 1 November 2024 (both dates

inclusive).

- 2.4.2 The duration of the proposed project shall normally last from 12 to 24 months. Applications of projects with a longer duration will be considered provided that there are strong justifications and merits.

2.5 Funding

2.5.1 Funding Cap

No upper limit of grant sought is set for each application. **Grants are allocated on a competitive basis.** The number of research and development projects to be approved for this call for applications is based on the quality of the proposals as assessed by the Vetting Committee under the Working Group on Language Education Research of SCOLAR (the Working Group hereafter), the availability of funds, and any other factors as appropriate.

2.5.2 Allowable Costs and Unallowable Costs

- 2.5.2.1 Applicants are required to refer to the principles for determining allowable and unallowable costs for LF projects as set out at Annex I when considering the budget for their applications.
- 2.5.2.2 Grants may be provided for the remuneration of research support staff members who assist in conducting research and development work and are remunerated with salary. In case where a research support staff member is employed for several projects, his/her salary should be apportioned accordingly. The policy on the prevention of double benefits also applies to the remuneration of research support staff. The underlying principle is to ensure prudent use of public resources.
- 2.5.2.3 The grants must not be used to remunerate the PIs and/or Co-Is and/or subsidise their salaries, including honorarium in any ways.
- 2.5.2.4 In very exceptional circumstances and with strong justifications,

the LF will provide limited funding for supporting a relief teacher for the purpose of releasing the PI of a project for research. The funding is an earmarked sum, out of the approved project fund, for hiring a relief teacher at the institute of the PI. This earmarked amount is not transferable and must not be used to meet other items of expenses of the approved project. Any surplus shall be returned to the LF. The policy on the prevention of double benefits also applies to the funding for supporting a relief teacher. The underlying principle is to ensure prudent use of public resources.

2.5.2.5 Applicants who fail to comply with the policy on the prevention of double benefits will be required to refund the LF the benefits overpaid to them with interest.

2.5.2.6 For applications submitted by organisations/bodies funded by the University Grants Committee that incur overhead charges, applicants may include the item in the budget together with details, justifications and breakdown.

2.5.3 *Outsourcing of Research and Development Work*

2.5.3.1 **The Project shall mainly be undertaken in Hong Kong.** In principle, the grants awarded for the approved projects must be used primarily for undertaking research and development work in Hong Kong. Nevertheless, it would be legitimate for the PIs of approved projects to use the grants awarded for data collection outside Hong Kong if this is a necessary and justified part of the research and development work and with **prior approval** from SCOLAR. SCOLAR will consider such requests on a case-by-case basis, having regard to the merits and justifications provided by the PIs.

2.5.3.2 Any outsourcing amounting to the sub-contracting of research and development work of the Project outside Hong Kong shall be strictly prohibited.

2.5.4 *Budget Proposal*

- 2.5.4.1 Grants awarded must be exclusively used for the approved projects only. The principle of economy and cost effectiveness of expenditure must be observed in budgeting.
- 2.5.4.2 In preparing the budget proposal, applicants are required to observe the Principles for Allowable and Unallowable Costs at Annex I of this Guide to Applicants. **SCOLAR has the discretion to determine the amount of grant, having regard to the circumstances of individual case.**
- 2.5.4.3 Applicants are required to include **a detailed budget breakdown** for all the proposed research and development work of the Project with justifications in the applications. Only expenses incurred within the project period as set out in the LF Agreement signed with the Trustee of the LF shall be covered by the approved grant. For proposed projects which extend beyond 12 months, detailed budget breakdown **by year** is required.
- 2.5.4.4 Applicants should make reference to the relevant rules and regulations of their affiliated organisations/bodies and the latest market rate with respect to the remuneration packages of research support staff which is commensurate with their qualifications and experience. Nevertheless, strict economy must be exercised in incurring any expenses to avoid lavishness. Research support staff is normally assumed to be appointed at the minimum pay rates. Strong justifications are required for the appointment of research support staff at higher pay rates. Applicants are required to provide supporting document(s) on updated staff pay scales of all proposed research support staff. The documents concerned shall be issued by the applicant's affiliated organisation/body and submitted together with the application form.
- 2.5.4.5 To ensure fairness, research support staff must be recruited through an open and competitive system. Job descriptions and qualifications required for the research support staff shall be provided in the applications.

- 2.5.4.6 Applicants are advised to include an adjustment for inflation/deflation not exceeding the prevailing rate when preparing the budget for proposed projects which extend beyond 12 months. **A contingency provision of not more than 3% of the Subtotal (i.e. Part B 2(g) of the application form), exclusive of staff costs (i.e. costs under Part B 2(a) Research support staff and 2(b) Relief Teacher of the application form), is considered acceptable for proposed projects lasting for more than 12 months.**
- 2.5.4.7 Applicants must indicate whether the proposed project is an extended project or the next phase of a previously completed project, and provide details including the name, duration, source of funding, and total budget of the completed project, etc. in the application.

3. ASSESSMENT MECHANISM

3.1 The Vetting Committee

- 3.1.1 The Vetting Committee, under the advice of the Working Group(s) of SCOLAR, will consider all applications received by the deadline of application and make recommendations to SCOLAR for funding approval.
- 3.1.2 Applications will be reviewed by external reviewers who are local and overseas language or language education academics and/or experts.
- 3.1.3 Comments and views of relevant Government bureaux/departments will also be sought for the applications for reference as appropriate.
- 3.1.4 The Vetting Committee will consider comments and views from both the external reviewers and the relevant Government bureaux/departments when assessing the applications.

3.1.5 The whole vetting procedures usually take not less than **nine months** after the application deadline.

3.2 Assessment Criteria

The relevance, quality, contribution(s) and impact(s) of the proposals to the language education and research in Hong Kong are the principal assessment criteria. The proposed projects will be assessed upon, but not limited to, the following assessment criteria–

3.2.1 Potential Benefits to Language Education in Hong Kong

3.2.1.1 The proposed project demonstrates a lot of potential benefits to the learning/teaching of Chinese/English language at various levels of schooling in Hong Kong or language education of Hong Kong as a whole;

3.2.1.2 The proposed project introduces new knowledge and/or practices serving to supplement or complement the existing practices/experiences to bring about positive capacity and/or impact on the learning and teaching of Chinese/English language in Hong Kong;

3.2.1.3 The proposed project, hence, will facilitate SCOLAR in charting out the way forward in continuing its vision in enabling the people of Hong Kong, in particular students and working adults, to become biliterate (in written Chinese and English) and trilingual (in Cantonese, Putonghua, and spoken English); and

3.2.1.4 The expected findings/outcomes, deliverables and experiences of the proposed project will benefit frontline practitioners and have good potential and significance for wide dissemination.

3.2.2 Quality of the Proposal

3.2.2.1 The objective(s) of the proposed project fall(s) within the priority themes identified by SCOLAR;

- 3.2.2.2 The proposed project has solid and sound theoretical/conceptual framework, research framework and questions, design and methodology, which are well-supported by literature review and/or are evidence-based;
- 3.2.2.3 The objectives are in alignment with the identified needs and will be attained and actualised by the suggested research framework, design and methodology;
- 3.2.2.4 The proposed project is unique, authentic, and is highly likely to bring about new, good knowledge and insights in respect of learning and teaching strategy, pedagogy and methodology in the learning/teaching of Chinese/English language at various levels of schooling or review/construction of curriculum, teaching/assessment framework or policy formulation in relation to language education of Hong Kong; and
- 3.2.2.5 In the case that the proposed project contains ideas adapted from and/or built on other research work or projects, it must include new elements which are substantiated by strong justifications and merits.

3.2.3 *Capability of the Applicant and Research Team*

- 3.2.3.1 The applicant and his/her research team possess the desirable capability, including but not limited to academic qualifications, research records, past research performance and outcomes of past projects, for conducting the proposed project; and
- 3.2.3.2 Sufficient relevant information and/or proven track records proving the applicant and his/her research team are in possession of the required expertise and experience, and are ready for project implementation is/are provided.

3.2.4 *Implementation Plan*

- 3.2.4.1 The proposed project has a clear, detailed, feasible and practical implementation plan, including project duration, a timeline for

implementation, the mode of operation, the target participants and the personnel involved, etc.;

3.2.4.2 The feasibility of the proposed project is sufficiently demonstrated by the applicant's readiness for conducting the research work through indication of possession of the required expertise and relevant supporting documents; and

3.2.4.3 The duration for implementing the proposed project will normally last from 12 to 24 months. A longer duration should be considered provided that there are strong justifications and merits.

3.2.5 *Proposed Budget*

3.2.5.1 The proposed project has a prudent, realistic and cost-effective budget which is commensurate with the scope of the proposed project;

3.2.5.2 A detailed budget plan comprising breakdowns of expenditure and strong justifications is provided;

3.2.5.3 Existing facilities and resources, if applicable, are used to implement the proposed project; and

3.2.5.4 The principle of strict economy and cost effectiveness is observed in the budget to avoid lavishness.

4. MONITORING AND DISSEMINATION

All of the approved projects are subject to monitoring by SCOLAR.

4.1 Submission of Reports and Deliverables

4.1.1 The PIs of approved projects shall play an active role in the overall development, management, monitoring and self-evaluation of the approved projects.

4.1.2 The PIs of approved projects will be required to submit progress

reports and interim financial reports on a regular basis during the project period, and an end-of-project report, a final financial report and an audit report within three months upon completion of the approved projects.

- 4.1.3 The PIs of approved projects will be required to provide **tangible deliverables** of the approved projects that may enhance frontline practices, in addition to research findings/outcomes, within three months upon completion of the approved projects.
- 4.1.4 The PIs of approved projects will also be required to provide **teacher-friendly pre-recorded videos as well as articles or insight notes of the findings and project outcomes/deliverables** of the approved projects targeting frontline practitioners within three months upon completion of the approved projects.

4.2 Presentation and Dissemination of Results⁴

- 4.2.1 For knowledge transfer purposes, PIs and Co-Is of approved projects will be required to present the Results of the approved projects to SCOLAR and other relevant parties as appropriate and to respond to requests for information in respect of the approved projects when invited by SCOLAR.
- 4.2.2 PIs and Co-Is of approved projects will be required to participate actively in the promotion, publicity and dissemination activities in respect of the approved projects organised or facilitated by SCOLAR.
- 4.2.3 PIs and Co-Is of approved projects will also be required to take a proactive role in disseminating the Results of the approved projects for knowledge transfer purposes to frontline practitioners, language education academics, researchers or professionals through participating in relevant dissemination activities, such as seminars, workshops, as well as local and/or international conferences.

⁴ “Results” means any output arising from the approved projects, including, but not limited to articles, papers, presentations, summaries, publications, statistics, videos, reports, learning/teaching materials and devices.

5. INTELLECTUAL PROPERTY RIGHTS ⁵ AND USE OF RESULTS

- 5.1 All the PIs and Co-Is of approved projects shall grant to the Grantor, its authorised users, assigns and successors-in-title irrevocable, perpetual, worldwide, freely transferrable, sub-licensable, licenses free of royalty, licence fee or other charges to use the Results. Such licenses to use shall include the right to –
- 5.1.1 Copy the Results in any format and in any medium;
 - 5.1.2 Upload the Results, including but not limited to the final reports and deliverables of the approved projects to SCOLAR’s website and make available copies thereof to the public;
 - 5.1.3 Issue copies of the Results to the public, including publishing the Results or any part thereof in reports, publications and/or publicity materials;
 - 5.1.4 Circulate the Results to bureaux and departments of the Government and other statutory bodies for reference;
 - 5.1.5 Play and show the Results or any part thereof in public; and
 - 5.1.6 Make an adaptation of the Results or any part thereof.
- 5.2 In relation to any part of the Results to which the PIs and Co-Is of approved projects are not empowered to grant the licenses aforesaid, the PIs and Co-Is of approved projects shall procure at their own cost and expense the grant of such rights for the benefits of the Grantor, its authorised users, assigns and successors-in-title by the relevant third party Intellectual Property Rights owners. In all instances, the copyright of PIs and Co-Is will be duly

⁵ Intellectual Property Rights” means patents, trade marks, service marks, trade names, design rights, copyright, domain names, database rights, rights in know-how, new inventions, designs or processes and other intellectual property rights whether now known or created in future (of whatever nature and wherever arising), and in each case whether registered or unregistered and including applications for the grant of any such rights.

acknowledged.

5.3 The PIs and Co-Is of approved projects shall warrant to SCOLAR that –

5.3.1 The provision of the Results in performing the approved projects, and the use or possession by SCOLAR, its authorised users, assigns and successors-in-title of the Results or any part thereof for any of the purposes contemplated by the respective application forms or this Guide to Applicants does not and will not infringe any Intellectual Property Rights and any other rights of any persons.

5.3.2 In respect of any materials used by the PIs and Co-Is in the performance of the approved projects and in respect of which any Intellectual Property Rights are vested in a third party, the PIs and Co-Is shall have obtained the grant of all necessary clearances for themselves and their authorised users, and the Grantor, its authorised users, assigns and successors-in-title authorising the use of such materials for any of the purposes contemplated by the respective application forms or this Guide to Applicants.

5.3.3 In the dissemination or publication of the Results of the approved projects in any formats and in any media, the viewers/users of the Results shall be well-informed that the approved projects were funded by the LF.

6. NOTES TO APPLICANTS

6.1 LF Agreement

Upon successful applications, LF grants, though awarded to specific projects in the names of individual PIs, are normally grants allocated to local tertiary institutions, registered organisations, statutory bodies or recognised community organisations. By accepting the approved grants and signing the LF Agreements, the institutions, organisations or bodies which endorse and support the applications agree to abide by all the

relevant guidelines on disbursement, accounting and monitoring arrangements of the approved projects.

6.2 Schedule of Payment

Grants for the approved projects are normally distributed to the Grantees⁶ by instalment(s) subject to mutual agreement, having regard to the approved project duration and circumstances of individual cases.

6.3 Procurement

The purchase of goods and services of the approved projects should be conducted in an open, fair and competitive manner and in line with the General Guidelines on Procurement specified in the LF Agreement.

6.4 Management of Approved Grants

Grantees of approved projects are required to open and maintain with a licensed bank in Hong Kong a designated bank account or to set up a separate ledger in the Grantee's finance system designated for the sole purpose of keeping and transacting all monies of the approved grants. The approved grants shall be deposited to the designated bank account of the Grantee bearing account names such as "ABC Organisation – Language Fund Account" and "XYZ Institute/ University – Language Fund Account" or the separate ledger in the Grantee's finance system.

6.5 Audit Requirement

6.5.1 Grantees are required to submit audit reports of their approved projects to ensure good use of the grants awarded within three months after completion of the projects or the date of termination in case of early termination of the projects.

6.5.2 The Grantees shall keep proper books and records for at least seven years after completion of the approved projects, and make

⁶ Grantees refer to the institutions or organisations which endorse and support the applications and which agree to abide by all the relevant guidelines on disbursement, accounting and monitoring arrangements of the approved projects by accepting the Grants and signing the LF Agreements with the Grantor.

available to the auditors all information, documents and explanations relating to the approved projects.

6.6 Change(s) of Approved Projects

6.6.1 The approved projects must be organised and carried out according to the details as specified in the respective proposals as approved by SCOLAR and included in the LF Agreements signed.

6.6.2 **Prior approval for any changes to the approved projects must be sought from SCOLAR** by providing details of the proposed changes and justifications in the *Application Form for Changes*. The form can be obtained upon request. Applications must be submitted by post **not less than one month in advance** of the proposed change(s) to be made. The application processing will take not less than four weeks from the submission date.

6.6.3 **No changes to the approved proposals without the prior approval of SCOLAR are allowed.** If any changes are made without prior approval of SCOLAR and there are no justified reasons for the non-reported case, SCOLAR reserves the right to reduce or withdraw the funding.

6.6.4 Changes of PI or Co-I(s) of approved projects are not normally permitted. Such changes may result in termination of the approved project by SCOLAR.

6.7 Insurance

SCOLAR does not accept any responsibilities for claims, demands or liabilities arising from the approved projects. The Grantees shall take out appropriate liability insurance for the projects concerned (including public liability insurance).

6.8 Publications, Promotional Materials and Dissemination

6.8.1 All publications and/or promotional materials, including but not restricted to audio or visual materials relating to the approved

projects, shall not infringe copyright or Intellectual Property Rights. The publications and/or promotional materials shall be sent to the Language Education and SCOLAR Section (LE & SCOLAR Section hereafter) in advance for consideration. All publications and/or promotional materials shall not be produced for sale within the project period.

- 6.8.2 Grantees must acknowledge the funding support of SCOLAR for the approved projects in any forms of publications and/or promotional materials. They should use the following template for the acknowledgment in the publications:

“This work is funded by the Language Fund under Research and Development Projects 2024-25 of the Standing Committee on Language Education and Research (SCOLAR), Hong Kong SAR.”

6.9 Invitation to SCOLAR

Grantees shall invite SCOLAR Members and staff of the LE & SCOLAR Section to attend the relevant promotional and/or dissemination activities of the approved projects as appropriate.

7. Right of SCOLAR

SCOLAR reserves the right to revise or amend at any time the conditions of the grants and to suspend or terminate the grants of approved projects at any time if the Grantees or PIs of approved projects violate the LF Agreements signed.

8. Submission of Application

The application form can be completed either in Chinese or English.

Procedures to be observed for application:

- Step 1: Complete **Parts A and B of the application form** online at SCOLAR's website (<https://scolar.gov.hk>), submit the completed form online and then print out a hard copy of the completed form.
- Step 2: Download **Part C of the application form** at SCOLAR's website (<https://scolar.gov.hk>) and arrange for it to be completed by the appropriate authority of the unit/department/centre of the organisation/body/community organisation concerned.
(The completed Part C of the application form must include the signature of the person-in-charge, as well as the official chop of the unit/department/centre of the organisation/body/community organisation.)
- Step 3: Post the whole set of the application documents, which should comprise the printout of Parts A and B of the online application form, the hard copy of the completed Part C of the application form, together with all relevant supporting documents, including but not limited to the following, to the postal address below.
- a. Updated staff pay scales of all proposed research support staff and relief teachers (if applicable);
 - b. a copy of the organisation's registration document;
 - c. a copy of supporting documents certifying that the organisation qualifies for tax exemption under section 88 of the Inland Revenue Ordinance (applicable to charitable organisations only); and
 - d. a list of publications of the organisation/body/community organisation in the past three years (if any).

Postal address:

**Language Education and SCOLAR Section, Education Bureau
Room 1702, Skyline Tower,
39 Wang Kwong Road
Kowloon Bay, Kowloon
[Application for Research and Development Projects 2024-25]**

Applicants are reminded that the application will only be completed until all of the three steps above have been concluded by the following application deadline:

Application deadline: 5:00 p.m. on 28 June 2023 (Wednesday).

(Date of postmark for the hard copy of the application documents must not be later than the closing date and time. Late submission will not be considered. Applications by fax or e-mail will not be accepted.)

Applicants will be requested by SCOLAR to provide supplementary documents and information for processing their application when needed. Failure to provide such information within the set time frame will deem the application to be unsuccessful without further notice. All submitted applications and supplementary documents, whether accepted or not, will not be returned.

Applicants will be informed of the result by e-mail not later than June 2024.
The decision and the amount to be granted rest with SCOLAR.

Details on the use and handling of personal data are set out at Annex II.

ENQUIRIES

For enquiries, please contact the LE & SCOLAR Section at 3156 1248 or visit SCOLAR's website at <https://scolar.gov.hk>.

**Language Education and SCOLAR Section
Education Bureau**

Research and Development Projects 2024-25 Principles for Allowable and Unallowable Costs

Introduction

This document aims at assisting applicants in considering whether the cost of an item is allowable under the Language Fund (LF hereafter) 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 an LF project are as follows –
 - (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; and
 - (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.

Allowable Costs

4. Expenses which mainly are Staff Cost, Operation Cost, Promotion Cost and General Expenses **will normally be considered, depending on the circumstances of individual case.** Some allowable items are listed below as a reference.

(a) Staff Cost

(i) Research Support Staff

- The Grant normally supports research support staff at the Research Assistant (RA) level. Additional justifications shall be required if staff above RA level is requested.

(ii) Relief Teacher

- The main duty of relief teachers is to relieve the PIs of their day-to-day teaching loads and administrative burden related to teaching work. They shall not take up non-teaching related duties, such as purely administrative work, of the PIs;
- It is not necessary to find a relief teacher with equivalent salary, status and experience as the PI concerned;
- The post-secondary or tertiary institutions are requested to confirm that the salaries of the relief teachers proposed by the PIs do not exceed the salary of the Staff Grade 'G' (i.e. Lecturer (U)) or equivalent of the post-secondary or tertiary institutions concerned. If applicants or post-secondary or tertiary institutions intend to employ a relief teacher with salary higher than that for 'Lecturer (U)' or equivalent, strong justifications must be provided for consideration by SCOLAR;
- The duration of employment of relief teachers should normally range from six to a maximum of twelve months for a typical 24 to 36-month project;
- SCOLAR agrees in principle to provide, in cases where there is genuine need, funding for relief teachers so as to enable the PI to allocate sufficient time for the approved project. Nevertheless, SCOLAR is of the view that it is the primary responsibility of the institutions to put their resources in areas where they would be best

used. Hence, such funding will be provided only exceptionally and with strong justifications; and

- If a relief teacher is required, applicants are required to state the rank of the relief teacher, the duration of employment and costs involved. Applicants are also required to provide supporting document(s) on updated salary pay scales of all proposed relief teachers. The documents concerned shall be issued by the applicant's affiliated organisation/body and submitted together with the application form.

(b) *Research/development-related activities*

- Research/development-related activities include but are not limited to rounding up the completion of a project, seminars, workshops, and exhibitions. Applicants must set out in detail in the application the objective(s), arrangements, expenditure and relevant details of the activities concerned.

(c) *Educational materials (e.g. educational booklets or DVDs);*

(d) *Allowances for voluntary helpers;*

- Allowances can be provided for voluntary helpers to cover any unavoidable cost(s) in relation to research/development activities of approved projects, such as traveling and meal expenses;
- Traveling expenses must be incurred from the cheapest reasonable form and route of public transport;
- Cash allowance for voluntary helpers is not allowed.

(e) *Insurance for research/development-related activities (including public liability);*

(f) *Traveling expenses*

- Allowances can be provided for PIs, Co-Is or research support staff to cover local traveling expenses incurred from the cheapest reasonable form and route of public transport in relation to research/development activities of approved projects.

(g) *Fees for instructors/speakers in relation to research/development activities of approved projects;*

(h) *Publicity (e.g. promotional materials, certificates for volunteers);*

(i) *Conference expenses*

- A provision of up to \$20,000 per year of conference expenses is allowed for dissemination of project results by PIs and Co-Is altogether and PIs and Co-Is only;
 - For each conference trip, allowances can be provided to cover a round-trip flight ticket (economy class), hotel accommodation and the conference registration fee only; and
- (j) *Overhead charges*
- Applications submitted by tertiary institutions funded by the University Grants Committee that incur overhead charges may include this item in the budget together with details, justifications and breakdown. In general, such charges shall not exceed 15% of the Subtotal in Part B 2(f) of the application form.

Unallowable Costs

5. Grantees shall finance the unallowable costs from non-LF sources.
6. Some unallowable items are listed below as a reference.
 - (a) *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*
 - Purchase of furniture and/or equipment, such as computer, audio/video equipment items which will incur recurrent expenditure;
 - Maintenance costs for equipment such as computer, audio/video equipment, etc.;
 - Computer accessories and peripherals such as portable flash drive, portable hard disk, etc.;

- (e) *Food Costs*
 - Food of any kind such as snacks, beverages, refreshments, and meals for project staff (except for voluntary helpers);
- (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) *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) *Stored value card*
 - Costs for acquiring and/or adding value to stored value card such as Octopus, phone card;
- (k) *Traveling*
 - Employees' traveling expenses between home/ accommodation and workplace;
 - Excess traveling 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.;
- (m) *Administration Cost*
 - General administration and expenses not directly related to the approved project; and
- (n) *Advertisement* (except for disseminating project deliverables and

results or staff recruitment).

Handling of Unallowable Costs

7. In general, expenditure on unallowable items that cannot be charged to the LF Grant shall be borne and financed by Grantees. Prior approval in writing must be sought from SCOLAR for any unallowable costs that may be incurred. SCOLAR may at its sole discretion determine whether to grant approval or not.

Language Education and SCOLAR Section Education Bureau

**Research and Development Projects 2024-25
Handling of Information and Personal Data Contained in
Research and Development Projects Application**

Purpose of Collection of Data

Information and personal data contained in your application are collected for the following purposes:

- (a) Determination of your eligibility to apply for funding for the research and development projects;
- (b) assessment of the merits of proposal which you have submitted for funding support;
- (c) assisting the Vetting Committee in identifying academic(s) and expert(s) to assess your proposal; and
- (d) compilation of periodic reports and statistical returns for analysis and research by SCOLAR in relation to the use of LF.

Handling of Your Information and Data

2. Your proposal including your personal data (e.g. CVs) will be handled with care by the LE & SCOLAR Section. Staff of the LE & SCOLAR Section, members of the Vetting Committee, and other parties who may be involved in the processes described in Paragraph 1 above will be allowed access to the data on a need-to-know basis but they will be placed under a duty of confidentiality to the LE & SCOLAR Section. Information so collected by the LE & SCOLAR Section will not be used for any other purposes. If you want to exclude any individuals from access to your proposal, you should inform the LE & SCOLAR Section separately when you submit your application. SCOLAR does not accept proposals that are

classified “confidential” by the PIs. It also reserves the right to stop processing or reject any applications if the applicants’ requests render it impossible for the applications to be adequately assessed.

3. When SCOLAR obtains review on assessment on your proposal, the academic(s) and expert(s) will be made aware of the Personal Data (Privacy) Ordinance in Hong Kong.

4. Applicants should note the following –

- (a) All proposals will undergo a very rigorous assessment process which involves reviewers made up of academics and experts from the local/international academic/professional community and the Vetting Committee; and
- (b) grants are allocated on a competitive basis (the success rate is based on the quality of the proposals as assessed by the Vetting Committee, and the availability of funds, in a particular year/for each call).

Physical Retention of Applications

5. Applications that are funded will be retained at the LE & SCOLAR Section for periodic review of progress and final assessment of the research investigation and outcome.

Right of Access to Personal Data

6. Notwithstanding the arrangements described above, nothing in this note will affect your legal right to request access to data held by SCOLAR about you or your proposal and to update or correct such data.

Further Information

7. All requests for access to data or correction of your personal data or

for information regarding policies and practices and kinds of data held by SCOLAR should be made in writing, by post or by fax, addressed as follows:

**[Research and Development Projects 2024-25]
Language Education and SCOLAR Section, Education Bureau
Room 1702, Skyline Tower
39 Wang Kwong Road
Kowloon Bay, Kowloon, Hong Kong**

Fax: 2801 7732

**Language Education and SCOLAR Section
Education Bureau**