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19 June 2014

Legislative Council Secretariat  
(Attn: Ms Catherina YU)  
Legislative Council Complex  
1 Legislative Council Road  
Central, Hong Kong

Dear Ms YU,

Evaluation reports of the Community Care Fund assistance programmes

At the meeting of the Subcommittee on Poverty under the House Committee of the Legislative Council held on 24 May 2013, Members asked the Administration to provide the evaluation reports of the Community Care Fund assistance programmes. We provided a total of 12 evaluation reports (covering 13 programmes) on 19 June and 10 October 2013 respectively. The following three evaluation reports (covering four programmes) which have been completed recently are now attached for Members' information:

- (1) the evaluation report for the programme of "School-based fund (cross-boundary learning activities)";
- (2) the evaluation report for the "After-school care pilot scheme"; and
- (3) the evaluation report for the programmes of "Special subsidy to persons with severe physical disabilities for renting respiratory support medical equipment" and "Special subsidy to persons with severe physical disabilities for purchasing medical consumables related to respiratory support medical equipment".

For enquiries, please feel free to contact the undersigned. Thank  
you.

Yours sincerely,



(Ms Rebecca WAN)  
for Secretary for Home Affairs

c.c.

Secretary for Education (Attn: Mr David LEUNG)  
Director of Social Welfare (Attn: Ms Ann CHAN)

**Community Care Fund Programme  
School-based Fund (Cross-boundary Learning Activities)  
Evaluation Report**

**Purpose**

1. This paper outlines the findings of the report on the evaluation of the effectiveness of the School-based Fund (Cross-boundary Learning Activities) (the Fund) and recommends the future mode of operation.

**Background**

2. The former Community Care Fund (CCF) Steering Committee approved the implementation of the Fund at its meeting on 20 April 2011 to subsidise primary and secondary students from low-income families to participate in cross-boundary learning activities, thus providing these needy students with more opportunities to join such activities together with other students and enabling them to increase their knowledge, widen their horizon and enhance their learning experience. The Fund is a three-year programme running from July 2011 to June 2014<sup>1</sup>. The budget for this assistance programme is \$164.4 million per annum (excluding administrative costs), and the total expenditure is estimated to be \$496.2 million.

3. The target beneficiaries are Primary 1 to Secondary 6 students studying in Hong Kong government, aided and caput schools and schools under the Direct Subsidy Scheme who are in receipt of the Comprehensive Social Security Assistance (CSSA), or full or half grant from the Student Financial Assistance Agency (SFAA). Students who meet the “financially needy” criteria as determined by individual schools are also eligible (no upper limit). In 2012-13, the scope of the Fund was extended to cover subsidy for students representing Hong Kong in competitions outside the territory. Within the three-year period, each student may receive subsidy from the CCF to meet expenses for participating in one cross-boundary learning activity and for representing Hong Kong in one competition outside the territory. To benefit more students, the CCF stipulates that schools may only use the provision of the Fund to subsidise the same student in one cross-boundary learning activity and one competition outside the territory during the three-year implementation period (July 2011 to

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<sup>1</sup> In this paper, “year” refers to the implementation period of the Fund: 2011-12 means from 1 July 2011 to 30 June 2012; 2012-13 means from 1 July 2012 to 30 June 2013; and 2013-14 means from 1 July 2013 to 30 June 2014.

June 2014), with the maximum amount of subsidy for each activity/competition capped at \$3,000.

4. According to the decision made by the former CCF Steering Committee, during the three-year implementation period of the Fund, the Education Bureau (EDB) should work out the maximum amount of funding to be reserved for each participating school in the coming year by making reference to the estimated annual funding from the CCF and the number of students receiving CSSA, or full or half grant from the SFAA in each participating school. At the end of each school year, participating schools are required to submit an annual activity and financial report and funding will be disbursed on a reimbursement basis when the report has been vetted by the EDB. Before the commencement of the assistance programme, the EDB arranged briefings for schools to consult them about its implementation details and circular memorandum would be issued afterwards to invite applications from schools.

### **Progress and evaluation of the programme**

5. The EDB has finished disbursing the 2011-12 and 2012-13 provision of the Fund and completed the relevant evaluations. Funding allocation and utilisation rates are summarised as below:

Year	No. of schools allocated with funding	No. of schools having organised cross-boundary learning activities	No. of schools allocated with funding but without organising cross-boundary learning activities (as percentage of total no. of schools allocated with funding)	Estimated provision for schools allocated with funding (\$)	Amount of provision used (\$)	Utilisation rate
2011-12	812	625	187 (23%)	149,952,060	52,067,289	35%
2012-13	804	692	112 (14%)	161,460,940	61,883,021	38%

#### 2011-12:

6. In 2011-12, a total of 812 schools applied for the Fund and were allocated with funding. Of these, 625 schools (343 secondary schools, 249 primary schools, 32 special schools and the Vocational Training Council) used the provision of the Fund to organise cross-boundary learning activities and submitted to the EDB an annual activity and financial report. As for the remaining 187 schools allocated with funding, they did not use the provision of the Fund to organise any cross-boundary learning activities.

7. For the 625 schools that used the provision of the Fund to organise cross-boundary learning activities, altogether \$52.07 million from the Fund was used, accounting for 35% of the provision reserved. There were a total of 22 093 student beneficiaries. About 70% of the beneficiaries were secondary students and 30% were primary students. The per capita subsidy was \$2,357 on average.

8. The EDB approached 50 of the schools that had been allocated with funding but did not use the provision to conduct any cross-boundary learning activities and learnt that the major reasons were: (i) the schools did not have plans to organise any cross-boundary learning activities in 2011-2012; (ii) the number of students signing up was not sufficient for forming a study group/No application was received from their students; and (iii) the inexpensive tour fare could be covered by other sources of subsidy and there was no need to seek funding from the CCF.

9. To find out the reasons behind the low utilisation rate among schools that were allocated with funding from the Fund and had conducted cross-boundary learning activities, the EDB approached 22 of the schools with a utilisation rate of under 30% and learnt that the major reasons were: (i) not many students signed up for the activities; (ii) places within Guangdong were chosen as the destinations of cross-boundary learning activities and the tour fare per student was below \$3,000; (iii) both time and manpower were short; and (iv) some schools were heavily engaged with the new senior secondary curriculum, etc. and had scaled back their cross-boundary learning activities.

10. Of the 22 093 beneficiaries, about 50% were students in receipt of full grant from the SFAA, followed by those receiving half grant from the SFAA and CSSA. Students meeting the school-based “financially needy” criteria accounted for about 10%. Below is a breakdown of the figures:

CSSA (%)	Full grant of textbook assistance (%)	Half grant of textbook assistance (%)	Meeting school-based “financially needy” criteria (%)	Total (%)
3 761 (17.0%)	9 504 (43.0%)	6 258 (28.3%)	2 570 (11.6%)	22 093 (100%)

11. The Mainland was the primary destination for cross-boundary learning activities (over 60%), with places within Guangdong accounting for one-third. Taiwan and Southeast Asian countries were chosen as the destinations by about 30% of the schools. Below is a breakdown of the figures:

Destination	No. of activities	Percentage
Mainland (within Guangdong)	263	21.8%
Mainland (outside Guangdong)	497	41.2%
Taiwan	240	19.9%
Other Asian countries	146	12.1%
Australia/New Zealand	16	1.3%
Europe	22	1.8%
The United States/Canada	20	1.7%
Others (Mexico)	1	0.1%
<b>Total</b>	<b>1 205</b>	<b>100%</b>

*Revised estimates of provision:*

12. In 2011-12, the estimated provision for schools allocated with funding was \$149.95 million and the amount eventually used was \$52.07 million, much lower than the original estimated level. The utilisation rate was only 35%. Against this background, the CCF Steering Committee agreed to revise the funding proposal. Based on the utilisation rate of the provision in 2011-12, \$63.25 million and \$72.74 million were reserved for this programme in 2012-13 and 2013-14 respectively. As such, the revised estimate for the three-year implementation period of the Fund amounted to \$188.06 million (excluding administrative costs). However, the estimated amount available to each participating school shall remain unchanged at the same level as based on the number of eligible student beneficiaries in each school, so that the planning for cross-boundary learning activities will not be affected.

13. In 2011-12, the EDB conducted a survey among schools to gather their views on the Fund. The findings are summarised at **Appendix I**.

2012-13:

14. In response to the requests of certain schools and parents, the former CCF Steering Committee agreed to extend the scope of the Fund from subsidising needy students in cross-boundary learning activities to supporting needy students in representing Hong Kong in competitions outside the territory in the second year. Within the three-year implementation period of the Fund, each student may receive subsidy on their expenses for participating in one cross-boundary learning activity and for representing Hong Kong in one competition outside the territory.

15. In 2012-13, a total of 804 local schools applied for the Fund and were allocated with funding. Of these, 692 schools (371 secondary schools, 289 primary schools, 31 special schools and the Vocational Training Council) used

the provision from the Fund to organise cross-boundary learning activities and submitted to the EDB an annual activity and financial report. As for the remaining 112 schools allocated with funding, they did not use the provision of the Fund to organise any cross-boundary learning activities.

16. For the 692 schools that used the provision from the Fund to organise cross-boundary learning activities, altogether \$61.88 million from the Fund was used, accounting for 38% of the provision reserved. A total of 23 805 students were benefited. About 70% of the beneficiaries were secondary students and 30% were primary students. The per capita subsidy was \$2,600 on average.

17. Of the 23 805 beneficiaries, about 50% were students in receipt of full grant from the SFAA, followed by those receiving half grant from the SFAA and CSSA. Students meeting the school-based “financially needy” criteria accounted for about 12%. Below is a breakdown of the figures:

CSSA (%)	Full grant of textbook assistance (%)	Half grant of textbook assistance (%)	Meeting school-based “financially needy” criteria (%)	Total (%)
4 052 (17%)	10 194 (43%)	6 667 (28%)	2 892 (12%)	23 805 (100%)

18. The Mainland was the primary destination for cross-boundary learning activities (about 47%), followed by Taiwan and Southeast Asian countries (about 47%). Below is a breakdown of the figures:

Destination	No. of activities	Percentage
Mainland (within Guangdong)	222	16.32%
Mainland (outside Guangdong)	421	30.96%
Taiwan	367	26.99%
Other Asian countries	266	19.56%
Australia/New Zealand	32	2.35%
Europe	30	2.21%
The United States/Canada	22	1.62%
Others	0	0.00%
<b>Total</b>	<b>1 360</b>	<b>100%</b>

19. For 2012-13, since cross-boundary activities also covered representing Hong Kong in competitions outside the territory, 79 of the 23 805 beneficiaries were students who represented Hong Kong in some 30 competitions outside the territory, such as robot-making, music and sports competitions. The awards won included a silver medal in Mathematical Olympiad, first-runner up in team rope skipping and championship in children’s choir.

20. Of the 804 schools that were allocated with funding in 2012-13, 112 schools had not used the provision reserved to organise any cross-boundary learning activities. The EDB approached 60 of the schools that had applied for funding but did not use the provision and learnt that the major reasons were: (i) the schools had plans to organise activities but had to cancel them for various reasons (e.g. epidemic alerts and inclement weather); (ii) schools had secured other subsidy to support the cross-boundary learning activities; and (iii) the small number of students signing up for cross-boundary learning activities was not sufficient for forming a tour group.

21. Regarding the low utilisation rate, the EDB approached 30 of the schools with a utilisation rate of under 40% and learnt that the major reasons were: (i) not many of their students signed up for cross-boundary learning activities; (ii) the schools did not have adequate manpower to organise cross-boundary learning activities; (iii) places within Guangdong were chosen as the destinations of cross-boundary learning activities and the tour fare per student was below \$3,000; and (iv) schools encountered difficulties in finding time for the activities. The reasons are similar to those identified in 2011-12.

22. In 2012-13, the EDB conducted a survey among schools to gather their views on the Fund. The findings are summarised at **Appendix II**.

#### 2013-14:

23. As at April 2014, a total of 799 schools have successfully applied for the Fund and are allocated with funding (400 secondary schools, 364 primary schools, 34 special schools and the Vocational Training Council), accounting for about 80% of the schools in the territory.

### **Problems encountered in programme implementation**

24. Summing up the experience in taking forward the Fund in 2011-12 and 2012-13, we have identified the following problems in its mode of operation and disbursement:

*i) Low utilisation rate*

In 2011-12 and 2012-13, 187 and 112 schools that were allocated with funding under the Fund respectively did not use the provision to conduct any cross-boundary learning activities for various reasons (e.g. insufficient students signing up to form a tour group, alternative sources of subsidy). As for schools that had used provision from the Fund to conduct cross-boundary learning activities, the overall utilisation rate was low for various reasons (e.g. insufficient number



of signing up students, per capita tour fare of under \$3,000 because Guangdong was chosen as the destination). The average utilisation rate of the two years was merely 36.5%. With such a low utilisation rate, the provision reserved by the Fund had not been put to the best use and this is a wastage of resources.

ii) *The original purpose of the Fund*

The original purpose of the Fund is to support needy students studying in schools that plan to conduct cross-boundary learning activities anyway, so that they will not be deprived of the opportunities to take part in these activities together with other students because of lack of means. Since the inception of the Fund, some schools have reflected to us that they applied for the Fund because other schools were also joining, while others indicated that cross-boundary learning activities were organised because parents urged the schools to do so in the hope that their children could benefit from the Fund. This may explain why some 20% of the schools that had been allocated with funding did not conduct any cross-boundary learning activities at all and the overall low utilisation rate.

iii) *Room for improvement for objectives of learning activities*

Under the operation of the Fund, with the approval of their management committee, schools may receive funding from the Fund according to their number of eligible student beneficiaries. Upon completion of the cross-boundary learning activities, they have to submit an annual activity and financial report to the EDB and apply to the CCF for reimbursement of expenses. Since the Fund does not have a pre-approval mechanism for screening learning activities, there is room for improvement for the thematic appropriateness of the activities in terms of student needs.

iv) *Extra workload for schools and teachers*

Schools reflected to us that joining the Fund had created additional workload for them, such as design of activities, liaison with co-organisers and tour escorting. Administrative costs incurred by the schools are not covered by the Fund.

v) *Accompanying teachers of mainstream schools not subsidised*

The Fund primarily aims to subsidise needy students but not accompanying teachers. Except for special schools which can allocate up to 20% of the maximum amount of subsidy to support the

carers of students, the expenses of accompanying teachers of other schools will not be subsidised by the Fund and have to be absorbed by the schools themselves. Some schools were of the view that the Fund should subsidise the accompanying teachers as well.

vi) *Inadequacy of a subsidy of \$3,000*

The majority of schools considered a subsidy of \$3,000 inadequate for supporting the needy students. For example, the amount is not enough for covering the expenses on learning activities in the Southeast Asia.

vii) *Cross-boundary learning activities not an essential element*

There were public opinions that cross-boundary learning activities were not essential elements but merely part of the student activities. People suggested that the CCF devote its resources to more essential items. Besides, some travel agencies organised study tours that charged a fare close to the Fund's subsidy level of \$3,000 and made a profit by inviting schools to co-organise.

viii) *Reserved provision for junior primary students not put to best use*

At present, the same amount of subsidy is reserved for all primary and secondary students, irrespective of their level of study. But data showed that Primary 1 to Primary 3 students seldom participate in cross-boundary learning activities and the corresponding amount of provision used in 2011-12 and 2012-13 was below \$0.26 million, accounting for less than 0.3% of the overall funding used. Over the past two years, only 108 students had benefited in total, representing 0.8% of the total number of primary student beneficiaries. Resources could be redeployed to help other needy persons.

ix) *No upper limit for school-based "financially needy" criteria*

To support students in exceptional circumstances, schools may set their own "financially needy" criteria according to their respective situations and exercise discretion to provide uncapped subsidy for underprivileged students not meeting the eligibility criteria of the Fund, that is not receiving CSSA, or full or half grant from the SFAA. In 2011-12 and 2012-13, 25 and 34 schools respectively subsidised more than 50% of their student beneficiaries according to the school-based "financially needy" criteria, while 5 and 4 schools respectively subsidised about 90% of their student beneficiaries according to such criteria (see table below for details). The EDB is

concerned about the leniency of the “financially needy” criteria set by individual schools.

Meeting school-based “financially needy” criteria	No. of schools		Total (as percentage of overall school figures)
	2011-12	2012-13	
0 - 12.5%	476	512	988 (75%)
>12.5% - 25%	59	75	134 (10%)
>25% - 37.5%	41	44	85 (6%)
>37.5% - 50%	24	27	51 (4%)
>50% - 62.5%	14	16	30 (2%)
>62.5% - 75%	6	8	14 (1%)
>75% - 87.5%	0	6	6 (0.5%)
>87.5% - 100%	5	4	9 (0.7%)
Total	625	692	1 317 (100%)

### Recommendations for way forward and justifications

25. The EDB is supportive of the Fund’s efforts to help primary and secondary students from low-income families so that they will not be deprived of the opportunities to join cross-boundary learning activities organised by their schools together with other students because of lack of means. But after reviewing the existing mode of operation of the Fund, we consider that there is room for improvement in this respect. To address the issues raised above and enhance the effectiveness of cross-boundary learning activities, the EDB proposes that schools conduct cross-boundary learning activities under the framework of the Quality Education Fund (QEF).

26. The QEF was established in 1998 with a government injection of \$5 billion to provide an effective channel for worthwhile projects from the school education sector to be funded. For the detailed operation of the QEF, please refer to **Appendix III**.

27. The EDB proposes that schools apply for funding to conduct cross-boundary learning activities through the QEF mechanism. The justifications are set out below:

- Each year, the QEF selects priority themes according to the development trend and direction of our education sector as well as the needs of the society and schools at different stages, so that the education sector, schools and professional stakeholders can continuously enhance the quality of school education. In 2013-14, a total of 11 priority themes are introduced by the QEF<sup>2</sup>.

<sup>2</sup> The priority themes are: Catering for Students’ Learning Diversity, Effective Learning and Teaching of

- The QEF Steering Committee is responsible for assessing the project proposals submitted by schools according to the assessment criteria. Funded projects should cater for the needs and development of local students, teachers and schools and demonstrate an innovative element. If the school-based projects initiated by schools involve learning activities outside Hong Kong (including those in the Mainland and overseas), such as cross-boundary learning activities, the proposals should elaborate on the planning of the entire learning programme, with cross-boundary learning activities forming an integral part of and complementing other elements of the programme. This mechanism can ensure that the cross-boundary learning activities under planning are specific to the level and needs of the participating students.
- Under the QEF, if a project involves cross-boundary learning activities, each needy student may receive a subsidy up to \$6,000 for such activities and the accompanying teachers may also be subsidised. Since funding under the QEF is disbursed in advance, parents of student beneficiaries or the schools need not settle the expenses out of their own pocket. Subsidy under the QEF may cover the direct costs incurred by the implementation of the proposed projects, such as remuneration for staff recruited, expenses on equipment and general expenses.
- Starting from 2013-14, assessment procedures for applications not exceeding \$600,000 can generally be completed within three months. From 2014-15 onwards, assessment procedures for applications not exceeding \$150,000 will be streamlined to facilitate preparation of applications by schools.

28. As the QEF requires that projects with cross-boundary learning activities should have the support of relevant learning elements, the assessment mechanism should be able to ensure the effectiveness and appropriateness of the projects. Besides, the QEF's level of subsidy is on the whole more generous and flexible than that of the Fund. The EDB therefore proposes that subsidy for schools' cross-boundary learning activities be applied for under the QEF.

29. The CCF Task Force studied the evaluation report on the effectiveness of the Fund at its meeting on 10 March 2014. Members of the Task Force in general agreed that the programme had room for improvement and learnt that the QEF was in a better position to assist students in participating in cross-boundary learning activities. However, some members were concerned about the QEF's procedures for approving school applications. After deliberations, the Task

Force proposed that the Fund be suspended upon the completion of the programme for 2013-14. The EDB was tasked to keep in view students' use of funding from the QEF or other sources in cross-boundary learning activities and report to the CCF Task Force. The Commission on Poverty at its meeting on 24 March 2014 endorsed the relevant proposal.

Education Bureau  
April 2014

**School-based Fund (Cross-boundary Learning Activities)**  
**Views gathered from schools in 2011-12**

The Education Bureau conducted evaluation on the School-based Fund (Cross-boundary Learning Activities) (the Fund) in September 2012. Of the 812 questionnaires sent out, 521 were returned. The response rate was about 65%. The key findings are summarised below:

- The vast majority of the schools (497 schools or 95%) opined that the Fund could help students from low-income families who would otherwise have been unable to take part in cross-boundary learning activities. Students subsidised by the Fund were able to benefit in terms of knowledge, personal development and social skills, with broadened learning experience being most remarkable (500 schools or 96%).
- In selecting students according to the school-based “financially needy” criteria, schools mainly relied on the applications from parents (71%), followed by teachers’ nominations (52%). A small number of schools also conducted selection interviews (14%).
- For school staff in charge of matters related to the Fund, their work was mostly to escort students during the trip (391 schools or 75%) and liaise with co-organisers (384 schools or 74%).
- According to the schools, students subsidised by the Fund and their parents were very positive about the programme. About 83% of these students and 84% of their parents gave the Fund a “good” rating.
- On the other hand, the schools also put forward a number of suggestions for the improvement of the Fund, which mainly cover two aspects: (i) subsidy on school administrative costs should be granted to recruit additional staff to escort students during the trip or remunerate teachers who assume the role; and (ii) funding should be disbursed by the EDB at the earliest time possible after the submission of the annual activity and financial report/before the departure date of the tour to relieve the burden of low-income families.

**School-based Fund (Cross-boundary Learning Activities)**  
**Views gathered from schools in 2012-13**

The Education Bureau conducted evaluation on the School-based Fund (Cross-boundary Learning Activities) (the Fund) in September 2013. Of the 862 questionnaires sent out, 550 were returned. The response rate was about 64%. The key findings are summarised below:

**I. Overview:**

- The vast majority of the schools (533 schools or 97%) opined that the Fund could help students from low-income families who would otherwise had been unable to take part in cross-boundary learning activities. The percentage was higher than 2011-12. Students subsidised by the Fund were able to benefit in terms of knowledge, personal development and social skills, with broadened learning experience being most remarkable (526 schools or 96%). The percentage was the same as 2011-12.
- In selecting students according to the school-based “financially needy” criteria, schools mainly relied on the applications of parents (69%), followed by teachers’ nominations (46%). A small number of schools also conducted selection interviews (10%). This was similar to the overall situation in 2011-12.
- For school staff in charge of matters related to the Fund, their work was mostly to liaise with co-organisers (399 schools or 80%). When compared with 2011-12, there was less involvement in escorting students during the trip (362 schools or 72%). In addition, most schools joined hands with travel agencies to arrange cross-boundary learning activities (508 schools or 92%).
- According to the schools, students subsidised by the Fund and their parents were very positive about the programme. About 87% of these students and their parents gave the Fund a “good” rating. The percentage was higher than 2011-12. And about 73% of their teachers gave the Fund a “good” rating.
- Regarding the workload created by joining the Fund, about 22% of the school teachers rated it as “very heavy”, 48% rated it as “heavy”, 28% rated it as “average”, and the rest rated it as “not heavy” or did not give a response.
- Assuming no subsidy from the Fund, most schools expressed that they

would still organise cross-boundary learning activities (387 schools or 70%), while seven of them said that they would reduce the number of activities correspondingly. They cited “parents” (51%) and “other subsidy (such as the Quality Education Fund and the Hong Kong Jockey Club Life-wide Learning Fund)” (43%) as the major source of support, while “sponsoring bodies” (19%) and “non-government organisations” (7%) would play a lesser role.

- On the other hand, the schools also put forward a number of suggestions for the improvement of the Fund, which mainly cover three aspects: (i) to extend the scope of subsidy; (ii) to increase the amount of subsidy or the number of subsidised trips; and (iii) to provide administrative support.

## II. Profile of schools under the subsidy of the Fund:

- The utilisation rate of surveyed schools that had applied to the Fund and conducted cross-boundary learning activities in 2012-13 was as follows:

Utilisation rate	No. of schools	Percentage of no. of schools responding to the survey
0-20%	82	16.9%
21-40%	140	28.9%
41-60%	100	20.7%
61-80%	57	11.8%
81-100%	105	21.7%
Total	484	100%

- Regarding the use of provision, a total of 322 schools had a utilisation rate of below 60%. The three major reasons for the low utilisation rate were: (i) not many of their students signed up for cross-boundary learning activities (127 schools); (ii) the schools did not have adequate manpower to organise cross-boundary learning activities (119 schools); and (iii) places within Guangdong were chosen as the destinations of cross-boundary learning activities and the tour fare per student was below \$3,000 (107 schools). Other reasons include: schools encountered difficulties in finding time for the activities; schools were heavily engaged with the new senior secondary curriculum, etc. and had scaled back their cross-boundary learning activities.



- On the other hand, for schools that had applied for the Fund but did not conduct any cross-boundary learning activities in 2012-13, the reasons were as follows: (i) the schools had plans to organise cross-boundary learning activities but had to cancel them for various reasons (e.g. epidemic alerts and inclement weather) (20 schools); (ii) schools had secured other subsidy to support the cross-boundary learning activities (11 schools); and (iii) the small number of students signing up for cross-boundary learning activities was not sufficient for forming a tour group (10 schools).
- As to ways to improve the operation of the Fund and encourage schools to make more use of the funding, the major views were: (i) no limit should be set on the time that each student could be subsidised by the Fund; (ii) the amount of funding should be increased; and (iii) Subsidy should be given to teachers and staff escorting students during the trip.

### **Operation of the Quality Education Fund**

Formally established on 2 January 1998 with an allocation of \$5 billion from the Government, the Quality Education Fund (QEF) provides an effective means to finance worthwhile projects from the school education sector. The funding scope, assessment and operation of the QEF are outlined below for reference:

- The QEF finances various school projects on quality education mainly within the ambit of basic education, i.e. kindergarten, primary, secondary and special education. There are different types of projects, including: (i) projects for promoting effective learning; (ii) projects for promoting all-round education; (iii) projects for implementing school-based management; (iv) research projects for exploring education issues; and (v) projects for application of information technology.
- The QEF Steering Committee is responsible for advising the Government on the policies and procedures regarding the operation of the QEF. The Assessment and Monitoring Sub-committee and the Dissemination and Promotion Sub-committee are set up under the Steering Committee to provide support for the overall operation of the QEF.
- The QEF Steering Committee is responsible for assessing application proposals. For projects to be approved, they must fall within the scope of the QEF and be able to meet its objective to enhance quality school education. The project proposals must demonstrate an innovative element<sup>1</sup> and will be assessed in accordance with the criteria covering the following three aspects: (i) project needs (e.g. whether there is a demonstrated need for the project); (ii) project feasibility (e.g. whether the project has a realistic scope and an attainable target); and (iii) expected project outcomes (e.g. whether there are clearly stated criteria for evaluation with evidence-based measures for assessing the attainment of project objectives).
- Under the QEF, a funding ceiling on the cost of learning activities outside Hong Kong (including those in the Mainland and overseas) is set at \$6,000. The actual subsidy for each student may vary depending on their social-economic background. Students in receipt of the Comprehensive Social Security Assistance and full grant from the Student Finance Assistance Scheme (SFAS) can receive 100% support (i.e. \$6,000), and those in receipt of half grant from the SFAS can get 75% (i.e. \$4,500), while students not receiving the above assistance can get 50% (i.e. \$3,000).

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<sup>1</sup> Covering new ideas or practices (e.g. enhancement, adaptation) which serve to supplement or complement the existing practices in individual schools to bring about positive capacity and/or impact on learning and teaching.

- Provided that the applications submitted by schools are complete with the support of all required documents, applications for grant not exceeding \$600,000 will be processed within three months. In order to facilitate better use of the funding by school applicants to enhance the quality of education, each school applicant can submit at most three applications. In other words, each school may concurrently have three on-going projects at most. To better assist schools in implementing projects on enhancing the quality of education, the application procedures for projects seeking a grant of \$150,000 or below will be streamlined. Applicants are only required to submit an application proposal of not more than six pages and each of them can apply for funding for at most two projects of this category in each school year. The approval procedures take about three months to complete.
- Schools interested in joining the QEF programme may submit their applications to the QEF. Forms for application proposals, guidelines and frequently asked questions are available on the QEF website. Approved projects are subject to monitoring by the QEF. The QEF website also contains information on the preparation of progress reports, final reports, financial statements, and other matters that should be noted.
- The QEF has set up a Cyber Resource Centre with a view to promoting the resources originating from the QEF as well as sharing good practices of successful projects among teachers and schools. Resources collected at the Centre include project proposals, final reports, publications, video clips and teaching and learning materials, etc.

# **Community Care Fund Programme After-school Care Pilot Scheme Evaluation Report**

## **Purpose**

1. This paper outlines the findings of a report on evaluation of the effectiveness of the After-school Care Pilot Scheme (the Scheme) of the Community Care Fund (CCF) and proposals on the way forward. The Education Bureau (EDB) proposes to extend the Scheme for one year to the 2014/15 school year and to incorporate the effective elements identified in the Scheme progressively into other after-school support programmes.

## **Background**

2. Launched in the 2012/13 school year, the Scheme is introduced to encourage schools and non-governmental organisations (NGOs) to collaborate in order to provide after-school care to Primary 1 to Secondary 3 students from low-income families. The Scheme aims to co-ordinate and integrate after-school learning and supplementary activities for the students, so that apart from participating in existing after-school activities provided by schools or other organisations, they can make best use of their time after school. On 28 March 2013, the Commission on Poverty (CoP) resolved to extend the Scheme for one year to the 2013/14 school year. This report has consolidated the findings of the evaluation of the Scheme and proposed the way forward.

## **Implementation of the Scheme in the 2012/13 school year**

3. In the 2012/13 school year, the EDB received a total of 135 application proposals (75 from schools and 60 from NGOs). The assessment panel under the CCF had vetted all application proposals and found that some of them were not acceptable because the number of service days/hours was insufficient or they failed to strike a balance between academic and non-academic after-school activities. After the vetting, a total of 73 schools and NGOs (34 schools and 39 NGOs) were

provided with funding from the Scheme amounting to about \$28 million. Participating schools and NGOs received about \$380,000 per capita, benefitting about 6 400 students.

4. To ensure that the funding was well spent, the EDB had started to conduct inspection on all of the funded schools and NGOs since October 2012. The inspection was completed by June 2013. All the participating 73 schools and NGOs of the Scheme had submitted their interim report and annual report to the EDB.

#### Findings of the Interim Report

5. The interim reports showed that intake of students by a total of 36 schools/NGOs was lower than the number put forward by them in their application proposals, with a difference of more than 700 students. In 13 out of the 36 schools/NGOs, the shortfall was as much as 30% of the targeted student beneficiaries or above. The EDB had approached the schools/NGOs concerned for reasons of the shortfall. The key reasons given were: (i) parents did not allow their children to participate in the pilot scheme (for example, they worried that the activities would tire their children out); (ii) students were not enthusiastic about joining the Scheme (for example, a variety of extra-curricular activities had already been arranged by some schools for their students; there were school team activities or other after-school support activities; or students were engaged in other after school activities and private tutorial classes outside school); and (iii) some student beneficiaries dropped out of the Scheme.

6. The EDB had reported the shortfall as mentioned above to the CCF Task Force. In April 2013, the Task Force resolved that funds already earmarked to the schools/NGOs concerned would not be deducted but it was necessary to issue a warning letter to them and request them to give a reasonable explanation, while informing them that the shortfall would be one of the factors to be taken into account when the assessment panel considered their application for the Scheme in the 2013/14 school year. As a follow-up action, the EDB had also requested them to allow more students to benefit from the Scheme in the remainder of the school term.

#### Findings of Annual Report

7. According to the annual reports submitted to the EDB by participating schools/NGOs in December 2013, there were about 6 400 student beneficiaries.

8. A total of 58 173 hours were assigned for after-school care activities by the schools/NGOs. As compared to the 41 895 hours as reported in their application proposals, there was an increase of about 27%. Reasons given included: (i) schools/NGOs extended the activity time during school examinations or holidays to cater for the needs of students and their parents; (ii) schools/NGOs made use of the unspent funding to arrange additional activities for needy students; and (iii) NGOs continued the after-school support service in the summer holiday in response to parents' needs.

9. About 60% (or 35 723 hours) of the activities provided by schools/NGOs were academic-oriented activities (for example: tuition class, English class and writing skills class), and the remaining 40% (or 22 450 hours) were non-academic-oriented after-school activities (for example: magic class, craft and art class and chess class).

### **Implementation of the Scheme in the 2013/14 school year**

10. The CoP resolved in March 2013 that the Scheme will be extended for one year to the 2013/14 school year.

11. In response to requests from schools and NGOs, the EDB has streamlined the relevant application procedures for the 2013/14 school year and expanded the coverage of the target beneficiaries under the Scheme from Comprehensive Social Security Assistance (CSSA) students or students in receipt of full grant from the Student Financial Assistance Schemes (SFAS) in the 2012/13 school year to students eligible for half grant from the SFAS. Participating schools and NGOs are still given discretion to use 25% of the funding provided to them to take care of other needy students.

12. To achieve synergy effects and bring convenience to students and parents, the CCF has resolved that in the 2013/14 school year, NGOs in the Scheme are required to partner with at least one school while schools are allowed to apply for the Scheme on their own as in the past.

13. In the 2013/14 school year, the EDB received 162 application proposals in total with 114 from schools and 48 from NGOs. After vetting by the CCF assessment panel, 93 schools and NGOs (62 schools and 31 NGOs) were provided with the Scheme funding. The total funding amounted to about \$36 million, benefitting about 12 800 students.

The EDB disbursed half of the funding, or about \$18 million, to the participating schools and NGOs in August 2013.

14. The number of schools and NGOs joining the Scheme and receiving the funding has increased, from 73 in the 2012/13 school year to 93 in the 2013/14 school year, while the number of student beneficiaries has nearly doubled from 6 400 to about 12 800. The funding has grown from about \$28 million to about \$36 million (see table below).

	2012/13 school year	2013/14 school year
Number of participating schools and NGOs	73 (34 schools and 39 NGOs)	93 (62 schools and 31 NGOs)
Number of student beneficiaries	about 6 400	about 12 800
Funding	about \$28 million	about \$36 million

15. According to the application proposals submitted by participating schools and NGOs, there should have been 12 404 target beneficiaries. However, taking into account the fact that 31 participating schools/NGOs have an intake shortfall and that 62 participating schools/NGOs report an intake of students at a level the same as or above that stated in their application proposals, the total student beneficiaries on balance are 12 856, or 452 students (3.6%) more than that stated in their application proposals.

16. In most of the participating schools/NGOs (62), the number of student beneficiaries is the same as or above that stated in their application proposals. In the other 30% of the participating schools/NGOs (31), the level of intake is lower than that stated in their application proposals, in which 23 have an intake shortfall of less than 30% while the remaining 8 schools/NGOs have an intake shortfall of 30% or more.

17. The EDB has approached the above mentioned 8 schools/NGOs for reasons of the intake shortfall. The reasons given are: lack of demand and insufficient publicity; time involved in the after-school care being too long as seen by students or parents, etc.

18. The CCF Task Force appreciated that the demand by students for the service was bound to fluctuate. At its meeting on 10 March 2014, the Task Force approved that no deduction would be made from the funding allocated to schools/NGOs which had an intake shortfall. That said, a warning letter would be issued by the EDB to the 8 schools/NGOs which

have an intake shortfall of 30% or more. They are required to give a reasonable explanation for the shortfall. They are also informed that the shortfall would be one of the factors to be taken into account when they apply for the Scheme in the 2014/15 school year.

### **Findings of the evaluation and experiences gained**

19. To evaluate the implementation and effectiveness of the Scheme in the 2012/13 school year, the EDB has collected views from stakeholders including conducting a questionnaire survey to schools and NGOs. A summary of their views is in **Appendix**.

20. According to the views submitted to the EDB from schools/NGOs as well as the EDB's observations:

- i) The after-school support services jointly provided by schools and NGOs could achieve synergy effects in areas such as balancing students' academic needs with their non-academic needs, the use of venues and manpower arrangements.
- ii) Regarding the arrangement that schools and NGOs would apply for the Scheme on their own, it served to ensure that interested and needy schools and NGOs will submit their proposals, together with the funding required in the light of the estimated number of students and the specifics of their plan, to the CCF assessment panel. This would help ensure that resources are well-spent.
- iii) While nearly half of the participating schools/NGOs reckoned that demand outstripped supply when it came to after-school support service, about 80% of them indicated that they encountered difficulties in recruiting students to the Scheme. As a matter of fact, as reflected by some schools, the reasons for students not responding positively to the Scheme were: the availability of other extra-curricular activities and after-school support activities to students, the need for school team practices, and students joining after-school activities or tuition classes outside school.
- iv) Schools/NGOs generally supported the Scheme and the 25% discretion which allows them to take care of other needy students,



and the decision to expand the target beneficiaries from CSSA students or students eligible for full grant from the SFAS to students eligible for half grant from the SFAS.

- v) Schools/NGOs generally held that more flexibility should be allowed in the use of the funding (for example, the administrative costs and other expenses not meant to be used directly on students).

## **Way Forward**

### *New initiatives put forward in the 2014 Policy Address*

21. Under various assistance schemes offered by the Government and the CCF, schools and NGOs are able to provide extra-curricular activities as well as after-school learning and support for primary and secondary students in need. In the 2014 Policy Address, new initiatives were put forward to strengthen support in this regard. It was also stated that in the long run, the Government will explore ways to consolidated various assistance schemes to achieve greater effectiveness.

22. The EDB has implemented the School-based After-school Learning and Support Programmes (the Programme) since the 2005/06 school year. Currently, schools and NGOs are provided with the School-based Grant and Community-based Project Grant respectively to organise after-school activities for eligible participating students, i.e. Primary 1 to Secondary 6 students in receipt of the CSSA or full grant from the SFAS. In the 2013/14 school year, the funding for the Programme is about \$205 million<sup>1</sup> of which about \$84 million is for the School-based Grant. Schools receive on average a grant of \$100,000, and the largest amount received by a school is over \$300,000. A total of 497 projects were organised by 183 NGOs under the Community-based Project Grant and the average allocation per project is about \$240,000 with the largest allocation at about \$1.44 million.

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<sup>1</sup> The Programme is under regular evaluation with subsequent refinement including, among others, the apportionment of the Programme into the “school-based programmes” and the “community-based projects” since the 2006/07 school year to better meet the different needs of target students. In the 2010/11 school year, the annual provision of the Programme has been increased to \$175 million upon the evaluation enabling the NGOs to organise more after-school activities. Subsequent to the Government’s evaluation and relaxation of the family income threshold of the means test mechanism in respect of the SFAS, the provision for the Programme has been further increased corresponding to the increased number of students receiving full grant assistance. In the 2013/14 school year, the provision of the Programme is about \$205 million.

23. Upon evaluation of the utilisation of funding under the Programme and with reference to the effectiveness of allowing more discretion to schools/NGOs under the Scheme of the CCF, the EDB will, starting from the 2014/15 school year, implement the following measures:

- i) increase the flexibility of the School-based Grant by giving more discretionary quota allowed for schools from 10% to 25% to benefit more needy students who are identified by schools but not in receipt of CSSA or eligible for full grant from the SFAS;
- ii) based on schools' previous utilisation rate of the School-based Grant, provide schools with a relatively higher utilisation rate (say 80%) incentive funding when calculating the Grant. The objective is to encourage schools to fully utilise the School-based Grant and to deploy their resources flexibly with a view to enhancing the opportunities of needy students to participate in after-school activities.

24. The additional recurrent funding is about \$35 million per annum, an increase of more than 40%, at a level equivalent to the funding provided for the Scheme of the CCF in the 2013/14 school year (as compared to \$28 million in 2012/13 school year and \$36 million in 2013/14 school year).

25. The provision of the Programme is complementary in nature. To cater for the diverse needs of needy students, the Government has also launched, apart from the Programme and the Scheme of the CCF, various funding schemes to support schools and NGOs to organise extra-curricular activities and after-school tutorial services for needy primary and secondary students. The EDB has launched the After-school Learning Support Partnership Pilot Scheme since the second school term of the 2011/12 school year to provide after-school learning support to needy primary students. The prominent feature of this pilot scheme is that it enlists the prospective teachers, i.e. local students who are undergoing full-time teacher training (including courses for Bachelor of Education and Post-graduate Diploma in Education), to be the tutors. On the other hand, the Hong Kong Jockey Club Charities Trust has launched the Life-wide Learning Fund since 2002 to provide more funding to schools to support their needy students to participate in after-school activities. In fact, these programmes have been set up at different times with different funding sources (funded by the Government or by charities) and some of the programmes are implemented on a pilot basis to explore new elements. In the long run, it is our plan to explore the feasibility of consolidating the

various Government-funded programmes and to incorporate into our regular assistance programmes those elements which have been confirmed to be effective under the pilot schemes.

26. Besides, the Government is pleased to see that the business sector and community organisations have, on their own initiative, launched extra-curricular activities and after-school learning support programmes. To further encourage the business sector and organisations to collaborate with schools to facilitate the whole-person development of students from grassroot families, the Government will earmark another \$200 million on top of the original injection of \$200 million. The additional funding will be provided on a matching fund basis under the Partnership Fund for the Disadvantaged to launch more after-school learning and support programmes for primary and secondary students from grassroot families. The Social Welfare Department will coordinate this initiative.

*Extending the Scheme to the 2014/15 school year and direction of consolidation*

27. As a means to evaluate the effectiveness of the Scheme and premised on the need to avoid duplication of resources and effectively consolidate all relevant funding schemes, the EDB proposed to extend the term of the Scheme to another year to the 2014/15 school year and consolidate the schemes progressively in order to sustain the long-term effects of the Scheme. The additional one year will allow the elements of the Scheme which have proven to be effective to be incorporated into the current funding schemes, so as to ensure a smooth consolidation and facilitate easy adjustment of the schools and students.

28. In the consolidation process, the EDB will study the details of the relevant programmes, including funding arrangements, scope of subsidy, as well as the ratio and use of administrative costs, etc.

29. The EDB proposes to extend the Scheme generally on the existing mode of operation for another year. The CCF Task Force at its meeting on 10 March 2014 noted the evaluation report of the Scheme, and supported the proposal to extend the Scheme to the 2014/15 school year; and that actions would be taken to progressively consolidate various after-school support programmes. The CoP at its meeting on 24 March 2014 endorsed the proposal.

## Appendix

### **Views of Schools/Non-governmental Organisations on After-school Care Pilot Scheme of the Community Care Fund in the 2012/13 School Year**

The Education Bureau (EDB) conducted an evaluation of the After-school Care Pilot Scheme (the Scheme) in November 2013. A total of 73 questionnaires were distributed. Altogether 33 schools and 37 non-governmental organisations (NGOs) responded, a response rate of about 95%. The salient findings are as follows:

#### *I. Effectiveness of the Scheme*

- The schools/NGOs held that 81% of the participating students and parents rated the pilot scheme as “good”.
- The majority of the schools/NGOs held that students/parents rated the effectiveness of the “after-school learning” (88%) and “after-school activities” (80%) as “good”.
- The vast majority of the schools/NGOs (68 or 97%) held that participation in the Scheme would benefit more students from low income families who otherwise could not afford to participate in after-school activities. Without the Scheme, the majority of the students (87%) would have stayed at home.
- The schools/NGOs held that after participation in the Scheme, about 70% of the students were able to learn how to work with others, broaden learning experience and increase knowledge.

#### *II. Student intake*

- About 65% of the schools/NGOs selected students to fill the discretionary places on teachers’ recommendation, followed by other selection channels such as through applications by parents (32%) or interviews (20%).
- The majority of the schools/NGOs (64 or 97%) informed parents of details of the Scheme through letters/notices to parents, whereas a

small number of them held briefings (22%) or informed students verbally (14%).

- Nearly half of the schools/NGOs (34 or 48%) held that the supply of places under the Scheme could not meet the demand. Among them, however, about half of the schools/NGOs (18) could not make available more places due to shortage of funding (38%) or venue (29%).
- About 78% of the schools/NGOs reported difficulties in recruiting students mainly due to the fact that students did not have time for after-school activities or parents did not want their children to join the Scheme.
- About 81% of the schools/NGOs held that the ratio of students (25%) recruited through discretionary places to the total student population under the pilot scheme was appropriate; about 92% of the schools/NGOs were in support of covering students eligible for half grant from the SFAS in the Scheme.

### *III. After-school activities for participation*

- To encourage students to join the Scheme, the schools/NGOs indicated that they would make the activities more interesting (54 or 77%) or stress the importance of attendance to students/parents (46 or 62%).
- More than half of the schools/NGOs (36 or 51%) held that the appropriate proportion between tuition and extra-curricular activities should be 7:3.

### *IV. Teachers' qualifications*

- Tutors/teacher assistants employed by the majority of the schools/NGOs (56 or 80%) had teaching experience of less than five years and most of them were degree holders (49 or 70%).
- Most of the schools/NGOs (45 or 64%) had difficulties in recruiting tutors/teaching assistants, mainly because of insufficient applicants, applicants' asking salaries too high or applicants failing to meet minimum qualifications requirements.

## V. Others

- On the other hand, the responding schools/NGOs had put forward a number of suggestions for improving the Scheme. There were three key points: (i) increasing the funding amount; (ii) increasing flexibility in the use of the funding/more subsidised items/more subsidy for the administrative costs; and (iii) allowing flexibility in terms of hours for academic and non-academic activities.

**Community Care Fund Programme**  
**“Provision of Special Subsidy to Persons with Severe Physical Disabilities for Renting Respiratory Support Medical Equipment” and**  
**“Provision of Special Subsidy to Persons with Severe Physical Disabilities for Purchasing Medical Consumables Related to Respiratory Support Medical Equipment”**  
**Evaluation Report**

## **Background**

The Community Care Fund (CCF) has launched two assistance programmes, namely “Provision of Special Subsidy to Persons with Severe Physical Disabilities for Renting Respiratory Support Medical Equipment” (“RSME-Renting Programme”) and “Provision of Special Subsidy to Persons with Severe Physical Disabilities for Purchasing Medical Consumables Related to Respiratory Support Medical Equipment” (“RSME-Consumables Purchase Programme”), to provide a monthly special subsidy of not more than \$2,500 and \$2,000 respectively, for a maximum of 12 months to persons living in the community who are receiving Higher Disability Allowance (HDA) under the Social Security Allowance Scheme and have met the household financial requirement, so as to support them in renting necessary RSMEs and purchasing RSME-related medical consumables.

## **Implementation of Assistance Programmes**

2. The two programmes are administered by the Social Welfare Department (SWD). The “RSME-Renting Programme” was first launched by SWD in January 2013 with details of the programme announced and publicised<sup>1</sup>. Based on the record of the Computerised Social Security System (CSSS), invitation letters were sent to about 3 700 HDA recipients aged below 60<sup>2</sup> to invite those who are eligible to the programme to make application. In September 2013, the “RSME-Consumables Purchase Programme” was launched while the application period of the “RSME-Renting Programme” was extended. Invitation letters were sent to about 17 700 HDA recipients<sup>3</sup> for inviting the

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<sup>1</sup> Publicity efforts included press release, distribution of programme leaflets via SWD’s District Social Welfare Offices and the Home Affairs Department’s District Offices, and uploading all relevant information onto the SWD Homepage.

<sup>2</sup> The “RSME-Renting Programme” was targeted at HDA recipients who were aged below 60 when it was first launched. The age limit was lifted when the programme was extended in September 2013.

<sup>3</sup> On the specified date of the two programmes (i.e. 30 June 2013), there were about 17 700 HDA recipients, including the beneficiaries of “RSME-Renting Programme”. Invitation letters were also sent to these beneficiaries for inviting them to apply for the “RSME-Consumables Purchase Programme”.

eligible persons to make application. The application period for the two programmes ended on 31 December 2013. The subsidy was released quarterly through the beneficiaries' bank accounts for receiving HDA. The first batch of beneficiaries has been receiving subsidy with effect from end March 2013.

## **Evaluation**

3. The evaluation on the effectiveness of the two programmes commenced in January 2014 and was completed in February 2014. Considering that the two programmes were similar in nature and had the same target beneficiaries, while the calculation of the subsidies of the two programmes is correlated, the evaluation on the two programmes was thus held and consolidated into one report so as to offer a more comprehensive picture for comparison and analysis. The effectiveness of the two programmes was mainly evaluated through analysing the number of beneficiaries, the amount of subsidy disbursed, how the subsidies were used by the beneficiaries, as well as feedback from the beneficiaries and other relevant parties. The data was collected through the application forms submitted by the applicants, surveys conducted with the beneficiaries and the invitees who have not submitted application (the invitees), and from the public enquiries received. Besides, in conducting the evaluation on the two programmes, SWD had also made reference to other programmes under the CCF on the methodology used and experience gained.

## **Analysis of Evaluation Results**

### **(a) Statistical Data on Application and Profile of Beneficiaries**

4. SWD has received applications<sup>4</sup> for both or either one of the two programmes from a total of 209 persons. There were 186 and 128 applications for the "RSME-Renting Programme" and the "RSME-Consumables Purchase Programme" respectively and, among them, 105 applicants had applied for both programmes. Since one applicant could apply for the two programmes concurrently, to better reflect the conditions of the applicants, the data of the applicants of the two programmes were consolidated for compiling the statistics and making analysis, while some of the application figures will be listed separately. The application figures concerned<sup>5</sup> were as follows:

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<sup>4</sup> To ensure all the eligible persons could submit application, SWD had sent invitations to all HDA recipients. However, with no knowledge of their need for RSMEs and household financial condition, it was difficult to estimate the number of applications.

<sup>5</sup> The evaluation commenced in January 2014, the then figures were applied accordingly.



	Only applied for “RSME-Renting Programme”	Only applied for “RSME-Consumables Purchase Programme”	Applied for both programmes	Total no. of persons
No. of applications received	81	23	105	209
No. of applications vetted <sup>6</sup>	54	18	84	156
No. of pending applications <sup>7</sup>	27	5	21	53
No. of applications with subsidy granted	25	5	30	60

5. As at January 2014, 60 applicants had received the subsidy (the beneficiaries)<sup>8</sup>. The average monthly subsidy per beneficiary who only applied for the “RSME-Renting Programme”, only applied for the “RSME-Consumables Purchase Programme” and applied for both programmes was \$2,480, \$1,900 and \$2,969.7 respectively. Among the applications having vetted, 4 applicants were not eligible for the “RSME-Renting Programme” because most of them were not renting RSMEs; there were also 4 applicants who were not eligible for the “RSME-Consumables Purchase Programme” as most of them applied for both programmes, but there was no balance of subsidy left after deducting the remaining balance of subsidy granted under the “RSME-Renting Programme”<sup>9</sup>.

6. Among the 60 beneficiaries, those aged between 51 and 60 was the highest in number (18%), followed by the age group of 71 to 80 and 10 or below (both at 15%). On household size<sup>10</sup>, beneficiaries were mainly of 2-person and 4-person household (30% and 28% respectively), followed by 3-person household (22%).

7. Up to 90% of the beneficiaries acquired their RSMEs by renting, while

<sup>6</sup> The number of applications vetted included those with subsidy granted.

<sup>7</sup> These applications were pending mainly because the applicants have not yet submitted all the information required for the programmes.

<sup>8</sup> Subsidy to the remaining eligible applicants would be released subsequently.

<sup>9</sup> Those who have applied for both programmes may, after having paid the actual monthly rent of respiratory support medical equipment, use the remaining balance of subsidy, if any, granted under the “RSME-Renting Programme” for purchasing relevant medical consumables. Therefore, the actual subsidy to which these beneficiaries are entitled under the “RSME-Consumables Purchase Programme” is calculated by the subsidy rate based on their monthly household income deducting the remaining balance of subsidy granted under the “RSME-Renting Programme”.

<sup>10</sup> Household size refers to the applicant and all the family members living with him/her in Hong Kong.

the remainder either purchased or rented and purchased at the same time. The most common type of RSME used was oxygen concentrator, followed by BIPAP machine. The rent for RSMEs varied, ranging from about \$200 to \$1,300 per month, depending on the type of RSMEs. On average, the beneficiaries spent \$850 per month on renting RSMEs<sup>11</sup>. Besides, 67% of the beneficiaries only needed one type of RSME while 27% required two types.

(b) Survey on the Beneficiaries

8. SWD conducted a telephone survey on 55 beneficiaries<sup>12</sup> to understand their use of RSMEs, use of subsidy and how their daily life was being taken care of, as well as their opinions on the programmes.

(i) Use of RSME

9. Up to 60% of the interviewees had been using RSMEs for 3 years or above, while 24% had been using RSMEs for 1 to 2 years. The RSME-related expenses of most interviewees (58%) were borne by the family members living with them, while 38% of the interviewees needed to bear the related cost on their own. Moreover, their monthly expense on purchasing RSME-related consumables was mostly at the level of \$1,001 to \$1,500 (49%), followed by \$1,000 or below (27%); tubing was the most common related consumables that the interviewees needed, followed by nasal cannula.

(ii) Use of Subsidy and Care on Daily Living

10. Most of the interviewees reflected that there was no surplus of subsidy after deducting the cost of renting RSMEs and / or purchasing related consumables. There were only 3 interviewees who had surplus of subsidy. All of them had spent the surplus on the daily expense of the family, and one of them had also spent the surplus on other medical equipment / consumables and another one had used the surplus for medical consultation / drug fee.

11. For care on daily living, 71% of the interviewees needed to be taken care of by others. Most of them indicated that their main carers were family

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<sup>11</sup> This refers to the total cost for renting RSME divided by the number of beneficiaries under the “RSME-Renting Programme”.

<sup>12</sup> There were 5, among the 60 beneficiaries, who could not be invited for the telephone survey as they had passed away before the survey conducted.

members / relatives / friends living together, and agreed that the two programmes could relieve the pressure of their family members / relatives / friends in providing the related RSMEs and consumables.

(iii) **Opinion on the Programmes**

12. All the interviewees agreed that the two programmes rendered appropriate support to their need on the related RSMEs and consumables and they were all satisfied with the operational arrangement of the programmes. 76% of the interviewees had no further comments on the two programmes, while 18% expressed their wish for extending the subsidy period or incorporating the programmes into regular service, and the remainder (3 interviewees in total) had respectively reflected their opinions on raising the amount of subsidy, releasing the subsidy on a monthly basis and relaxing the scope of medical consumables.

(c) Survey on the Invitees

13. In order to understand their reasons for not submitting applications and their opinions on the two programmes, SWD conducted a telephone survey on 36 randomly selected invitees who had not submitted applications. All the 36 invitees indicated that they did not submit application because they were not using RSMEs and they all gave no comments on the programmes.

(d) Public Enquiries

14. In the course of implementing the programmes, SWD has set up a telephone hotline to provide necessary support and information to the parties concerned. From February 2013 up to now, SWD received 1 060 and 870 enquiries on the “RSME-Renting Programme” and the “RSME- Consumables Purchase Programme” respectively, over half of which were from invitees who did not use RSMEs enquiring whether or not they needed to return the application form, followed by enquiries related to eligibility and completion of application forms. In general, the main concern of public enquiries raised was about eligibility and operational arrangement. There was only one person who suggested to benefit all HDA recipients for the two programmes and not only those who were using RSMEs.

## **Conclusion**

### **(a) Publicity for the programmes**

15. SWD had issued invitation letters to all HDA recipients to ensure that all the potentially eligible persons have knowledge about the programmes details and might make their applications accordingly. Overall, the application rate was low. However, since all the invitees indicated in the survey that they did not submit application because they did not need to use RSMEs, which reflected that HDA recipients using RSMEs only took up a small proportion of the overall HDA recipients. Moreover, the two programmes had adopted relatively relaxed criteria on means test, including prescribing the limit of monthly household income at 150% Median Monthly Domestic Household Income, which should benefit most of the people with financial need. In addition, the arrangement of sending invitation letters to all HDA recipients could directly reach the target beneficiary group, which, together with the other publicity measures, including press release, distributing the programme leaflets via SWD's District Social Welfare Offices and the Home Affairs Department and uploading all relevant information onto the SWD Homepage, shall be able to make the programmes known to all the eligible persons.

### **(b) Operational Arrangement**

16. Though some beneficiaries suggested in the survey that the amount of subsidy of the programmes should be increased, that the subsidy should be released on a monthly basis, and that the programmes should be extended to benefit people using other medical consumables, all the beneficiaries in the survey were satisfied with the operational arrangement of the two programmes. Moreover, the telephone hotline service could effectively provide immediate support and information to the applicants and members of the public, and serve as a platform for members of the public to express opinions on the programmes. As half of the enquiries received were made by invitees who did not need to use RSMEs, but concerned whether they need to reply to the invitation letter of the programmes, it is worth, for the sake of relieving their doubt, indicating in the letter that reply is not required for those not using RSMEs.

17. Besides, a member of the public suggested that the two programmes should benefit all HDA recipients. Nevertheless, since the RSME-related expenses were relatively high, the two programmes were implemented to relieve the additional burden and financial pressure of persons with severe physical disabilities on using related equipment and medical consumables, so as to enable them to continue living in the community before the regularisation of the programmes. The suggestion is not in line with the original purpose of the two programmes to support the persons with severe physical disabilities who need to use RSMEs.

(c) Overall Effectiveness

18. The result of the survey reflected that beneficiaries responded positively to the two programmes, and they agreed that the programmes could relieve their financial pressure by offering appropriate support to them and their family members for the need of related medical equipment and consumables. About 20% of the beneficiaries in the survey supported the extension of the subsidy period of two programmes or incorporating the programmes into regular service. The beneficiaries had a long-term need for RSMEs, and the cost had to be borne by themselves or their family members. While the family members / relatives / friends living with the beneficiaries might take up the role of carer and thus would affect their employment, the two programmes had been duly in place to provide certain financial support to them, thus achieving the original aim of the programmes.

19. As reflected by the number of applications of the two programmes, only a minority of the HDA recipients needed to use RSMEs. Even though most of the beneficiaries in the survey reflected that there was no surplus of subsidy after deducting the cost of renting RSMEs and / or purchasing related consumables, considering their monthly expenses on renting RMSE and / or purchasing related medical consumables as stated in paragraph 7 and 9 above as well as the average amount of subsidy received per capita per month as mentioned in paragraph 5, the amount of subsidy provided by the programmes should be able to meet the needs of most of the beneficiaries. In view that the related subsidies have offered prominent support to the beneficiaries, it is recommended to regularise the two programmes for supporting the continual need of the persons concerned.

20. The Policy Address 2014 announced that the two programmes will be incorporated into regular service of the Government in 2014-15, and SWD plans to launch them in the third quarter of 2014-15. The effectiveness of the two programmes was prominent and the beneficiaries were also satisfied with the operational arrangement. These findings may have reference value in formulating the implementation details of the related regular service and could facilitate the smooth running of the regular service so as to offer more comprehensive support to persons with severe physical disabilities.

21. Moreover, to ensure that the beneficiaries of the two programmes can receive continual support to live in the community, there is a need to extend the programmes in this transitional period to allow the eligible persons to receive the subsidy until the regular service is launched.

Social Welfare Department  
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