

Quality Enhancement Support Scheme

Progress Report
Project No. : T01/QESS/2013

 Reporting Period : From January 2014 (month/year) to June 2014 (month/year) ✓

Part A

 Project Title : **Collection Sharing and Information Discovery System with Enriched Digital Content (CSIDS)**

 Name of Grantee : The Open University of Hong Kong (OUHK) (Principal Grantee)
 Caritas Institute of Higher Education (CIHE) (Joint Grantee)
 Chu Hai College of Higher Education (CHCHE) (Joint Grantee)
 Hong Kong Shue Yan University (HKSJU) (Joint Grantee)
 Tung Wah College (TWC) (Joint Grantee)

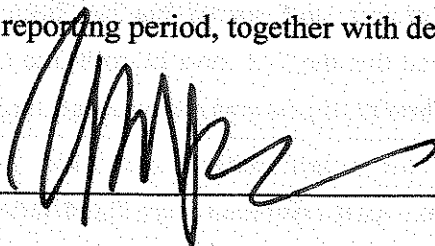
 Project Period : From January 2014 (month/year) to December 2016 (month/year)

Part B

Please use separate A4-size sheets to report the progress with regard to the following aspects:

1. Types and brief descriptions of Project activities held/completed during the reporting period (*the information may be presented in the form of a table*).
2. The dates, time, venues and number of participants / beneficiaries of Project activities held, and resources (e.g. equipment, manpower) used for the implementation of Project activities.
3. Project milestone(s) and deliverables attained at the end of the reporting period and evidence showing the attainment of milestones and deliverables.
4. The percentage, in terms of key tasks, of the Project completed at the end of each reporting period.
5. Project variation*, if any, during the reporting period, together with details and justifications.

Signature of Authorised Person:



 Name of Authorised Person : Prof Yuk-Shan WONG

President

 Position of Authorised Person : The Open University of Hong Kong

 Date : 17 July 2014


Organisation Chop

* A separate written application should be submitted to the Grantor for prior written approval.

Quality Enhancement Support Scheme

1. Project activities held/completed during the reporting period

For easy reference, the preparation work done before the official project commission date is included.

Dates, time and venues	Brief descriptions of activities and resources used for implementing the Project *	Number and types of participants (if applicable)
Project Management – in order		
CPT Meeting and IPT Meeting		
6 Sept 2013, OUHK	Central Project Team (CPT) established and 10 meetings have been held ever since. Representative of the vendor “ExLibris” was invited to join the meeting since the 5 th meeting in Jan 2014.	For membership of CPT and IPT, please refer to the Institutional Agreement
11 Oct 2013, CIHE	Internal Project Team (IPT) established for CIHE and 4 meetings were held ever since.	
28 Oct 2013, TWC	Internal Project Team (IPT) established for TWC and 2 meetings were held ever since.	
22 Jan 2014, CHCHE	Internal Project Team (IPT) established for CHCHE and 2 meetings were held ever since.	
Document Sharing and Briefing Session		
Dec 2013, OUHK	Document sharing site was established by OUHK. The sharing site houses all meeting documents and other document considered important by the CPT. A total of 506 documents have been uploaded.	CPT members
Dec 2013, OUHK	A briefing session on data migration and project implementation for ILS was conducted by the OUHK staff.	CPT members and staff members of participating institutes
Recruitment of Project Staff		
Sept 2013, OUHK	Recruitment of project staff started but has been difficult and slow. EDB has approved that the SAL post be split into two ALI/ALII posts. One Assistant Librarian II post was still vacant as at 30 June 2014.	OUHK
20 Jan 2014, CIHE	Recruitment of the project staff started. The posts ALII (project admin.), LAII and ALII (systems) were filled in April and May 2014 respectively. EDB has approved that the starting date of the 18 month contract could be delayed. One Analyst Programmer II post was still vacant as at 30 June 2014.	CIHE
Mar 2014, TWC	Recruitment of project staff started. The posts of Analyst Programmer II, Assistant Librarian II (Project Administration) and Library Assistant II will be filled in July 2014 whilst the recruitment of the post of Assistant Librarian II (Systems) was still in progress.	TWC

Quality Enhancement Support Scheme

Fund Handling and Grant Distribution		
11 Dec 2013	Fund handling will adopt the reimbursement approach and no dedicated bank accounts will be open for the joint grantee, as approved by the EDB and confirmed in 4 th CPT meeting.	EDB, CPT members
11 Dec 2013	Grant distribution among members for eBook collection building re-confirmed in 4 th CPT meeting.	CPT members
Publication / Promotion of the Project – completed as planned		
29 Oct 2013	<p>Press Conference for this Project was held. The Project was reported by four local newspapers including Sing Tao Daily, Apple Daily, Wen Wei Po and Ta Kung Pao.</p> <p>English: http://www.ouhk.edu.hk/wcsprd/Satellite?pagename=OUHK/tcGenericPage2010&c=C_PAU&cid=191181055800&FUELAP_SITEDBID=SITE_-66&lang=eng&FUELAP_OP=FUELOP_NewScreen</p> <p>Chinese: http://www.ouhk.edu.hk/wcsprd/Satellite?pagename=OUHK/tcGenericPage2010&c=C_PAU&cid=191181055800&FUELAP_SITEDBID=SITE_-66&lang=chi&FUELAP_OP=FUELOP_NewScreen</p>	Senior administrators and librarians of all participating institutes
Dec 2013	<p>The Project was reported in the Hong Kong Library Association HKLA Newsletter No.94, December 2013</p> <p>English version: http://www.hkla.org/newsletter/Dec13.pdf</p>	CPT members
Dec 2013	<p>The Project was reported in the OUHK Newsletter “Openlink” Vol.22, Issue.4</p> <p>English version: http://www.ouhk.edu.hk/wcsprd/Satellite?pagename=OUHK/tcGenericPage2010&c=C_ETPU&cid=1387268741276&lang=eng</p> <p>Chinese version: http://www.ouhk.edu.hk/wcsprd/Satellite?pagename=OUHK/tcGenericPage2010&c=C_ETPU&cid=1387268741276&lang=chi</p>	OUHK
Dec 2013	<p>The Project was reported in the TWC e-Newsletter December 2013 issue:</p> <p>English version: http://www.twc.edu.hk/enewsletter/people/twc-library-stays-ahead-of-technology</p> <p>Chinese version: http://www.twc.edu.hk/enewsletter/people-zh-hant/twc-library-stays-ahead-of-technology-hant?lang=zh-hant</p>	TWC

Quality Enhancement Support Scheme

Jan 2014	The Project was reported in Issue 13 (published in January 2014) of the CIHE house magazine "Vision" http://www.cihe.edu.hk/eng/about/newsletter/vision.html , in emails sent to staff and students, and in messages posted on the library notice-boards and library website.	CIHE
Dec 2013 – Jan 2014	The Project was reported in CHCHE's house magazine "Chu Hai College of Higher Education 63rd Commencement College Magazine, 珠海學院第 63 屆畢業典禮特刊" p.5. (copy attached as Annex I) Information about the Project has been posted up in the Library notice board.	CHCHE
Dec 2013 – Mar 2014	The Project was reported in the Library Management and Development Committee in Dec 2013 and the HKSYU newsletter "Shue Yan Newsletter" March Issue 2014 Chinese version only: http://stu.hksyu.edu/~newsletter/?p=2498 Information about the Project has also been posted up on the library notice board and on the library website.	HKSYU
System Selection – systems selected and installation completed		
Oct 2013 – Jan 2014	Tendering exercise for systems required by the Project was conducted. ExLibris was selected for building the CSIDS, ILL for OUHK and ILS for CIHE/TWC/CHCHE. Installation of CSIDS and ILS was completed in May 2014 and June 2014 respectively.	OUHK with input from CPT members
Jan 2014 – Apr 2014, OUHK	Tendering exercise for hardware and accessories required by the Project was conducted. Automated Systems Ltd, Microware Ltd, and Tai Fung (Hong Kong) Ltd were selected. All have been delivered and installed before June 2014.	OUHK with support from CPT members
Mar 2014, OUHK	Order of <i>Millennium Patron API</i> for HKSYU was placed with the vendor "Innovative Interfaces Inc" in Mar 2014. Installation in the HKSYU was completed in Apr 2014.	OUHK with support from CPT members
May 2014, OUHK	Order of <i>Millennium ISO ILL</i> for HKSYU was placed with the vendor "Innovative Interfaces Inc" in May 2014.	OUHK with support from CPT members
May 2014, OUHK	Order of domain name <i>csids.edu.hk</i> for the Project was placed with the vendor "Hong Kong Domain Name Registration Ltd".	OUHK with support from CPT members
May 2014, OUHK	Order of digital certificate for the security of the project website was placed with the vendor "DigiCert".	OUHK with support from CPT members

Quality Enhancement Support Scheme

System implementation - project schedule confirmed, implementation in order with hardware installation for ILS in CHCHE had been advanced from second half of 2014 to first half of 2014

Mar 2014 – May 2014	Implementation Plans for CSIDS and ILS have been discussed since Mar 2014 and confirmed in the 9 th CPT 2014 in May 2014.	CPT members and the vendor “ExLibris”
Mar 2014 - Jun 2014	CSIDS project kicked off with the following tasks completed: Installation of hardware in the OUHK – April 2014 Installation of Primo/ SFX in the OUHK – May 2014 Training of <i>PRIMO</i> and <i>SFX</i> – 10-13 June 2014	Staff members of all participating institutes
Mar – June 2014	ILS project kicked off: Installation of hardware in CIHE/ TWC/ CHCHE – May 2014 Installation of <i>ALEPH</i> in CIHE/ TWC/ CHCHE – June 2014	OUHK and Staff members of CIHE/ TWC/ CHCHE
May 2014,	Website of the Project www.csids.edu.hk established.	OUHK
May 2014	Development of the project website content started.	CPT members
May 2014	Digital certificate applied to the project website for security purposes.	OUHK

Collection Development and eBook purchase: collection building and the number of titles acquired were in order. To be cautious with budget control, only titles below HK\$2,000 for shared access were purchased.

Oct 2013	A paper on Collection Development Policies was confirmed in the 2 nd CPT meeting. A consortium was formed for the purchase of eBooks for shared access. (For details, please refer to Annex II)	CPT members
Oct 2013 – Jun 2014	A total of 32 eBook vendors have been contacted. Terms of trade have been actively negotiated during this period. 10 proposals have been accepted by the CPT and 5 license agreements have been signed.	CPT members
Dec 2013	eBook quotation template confirmed in the 4 th CPT meeting	CPT members
Dec 2013	eBook requirements to vendors confirmed in the 4 th CPT meeting	CPT members
24 Jan 2014	Account codes and reimbursement procedure established in the 5 th CPT meeting.	Finance Unit of OUHK and the CPT members
Mar 2014	A detailed Collection Development Guidelines was confirmed in the 7 th CPT meeting. (For details, please refer to Annex III)	CPT members

Quality Enhancement Support Scheme

<p>Jan 2014 – Jun 2014</p>	<p>No. of new titles collected by the OUHK and sent to member libraries for selection:</p> <table border="1" data-bbox="304 349 951 506"> <thead> <tr> <th colspan="3">No. of titles sent to members for selection</th> </tr> <tr> <th>English</th> <th>Chinese</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>10,022</td> <td>1,385</td> <td>11,407</td> </tr> </tbody> </table>	No. of titles sent to members for selection			English	Chinese	Total	10,022	1,385	11,407	<p>OUHK</p>																						
No. of titles sent to members for selection																																	
English	Chinese	Total																															
10,022	1,385	11,407																															
<p>Jan 2014 – Jun 2014</p>	<p>Subject keywords and profiles set up for the following disciplines:</p> <ul style="list-style-type: none"> • Business and administration & Economics • Education • Language and literature • Medicine & Nursing • Science & Technology 	<p>CPT members</p>																															
<p>Jan 2014 – Jun 2014</p>	<p>eBook recommendations submitted by member libraries:</p> <table border="1" data-bbox="312 920 1145 1335"> <thead> <tr> <th rowspan="2">Institutes</th> <th colspan="3">No. of recommendations submitted</th> </tr> <tr> <th>English</th> <th>Chinese</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>OUHK</td> <td>3,492</td> <td>1,579</td> <td>5,071</td> </tr> <tr> <td>CIHE</td> <td>3,486</td> <td>356</td> <td>3,842</td> </tr> <tr> <td>CHCHE</td> <td>1,958</td> <td>1,472</td> <td>3,430</td> </tr> <tr> <td>HKSJU</td> <td>4,526</td> <td>150</td> <td>4,676</td> </tr> <tr> <td>TWC</td> <td>2,910</td> <td>8</td> <td>2,918</td> </tr> <tr> <td>Total</td> <td>16,372</td> <td>3,565</td> <td>19,937</td> </tr> </tbody> </table>	Institutes	No. of recommendations submitted			English	Chinese	Total	OUHK	3,492	1,579	5,071	CIHE	3,486	356	3,842	CHCHE	1,958	1,472	3,430	HKSJU	4,526	150	4,676	TWC	2,910	8	2,918	Total	16,372	3,565	19,937	<p>CPT members</p>
Institutes	No. of recommendations submitted																																
	English	Chinese	Total																														
OUHK	3,492	1,579	5,071																														
CIHE	3,486	356	3,842																														
CHCHE	1,958	1,472	3,430																														
HKSJU	4,526	150	4,676																														
TWC	2,910	8	2,918																														
Total	16,372	3,565	19,937																														
<p>1 Jan 2014 – 30 Jun 2014</p>	<p>eBook acquisition status:</p> <table border="1" data-bbox="320 1469 1171 1760"> <thead> <tr> <th></th> <th>English</th> <th>Chinese</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>No. of eBook order placed</td> <td>2,211</td> <td>1,114</td> <td>3,325</td> </tr> <tr> <td>Commitment + Expenditure (HKD)</td> <td>\$1,651,623.05</td> <td>\$307,976.49</td> <td>\$1,959,599.54</td> </tr> </tbody> </table>		English	Chinese	Total	No. of eBook order placed	2,211	1,114	3,325	Commitment + Expenditure (HKD)	\$1,651,623.05	\$307,976.49	\$1,959,599.54	<p>OUHK</p>																			
	English	Chinese	Total																														
No. of eBook order placed	2,211	1,114	3,325																														
Commitment + Expenditure (HKD)	\$1,651,623.05	\$307,976.49	\$1,959,599.54																														
<p>* Evidence showing the attainment of milestones scheduled for completion during the reporting period should be attached (e.g. photos, learning materials, webpage screens, promotion leaflets / posters, relevant reports, etc.).</p>																																	

Quality Enhancement Support Scheme

2. The percentage, in terms of key tasks, of the project completed at the end of the reporting period

Milestones scheduled for completion during the reporting period **	% attained	Remarks
➤ Formulation of policy for developing book collections	100%	
➤ Publication of the project	100%	
➤ Purchase of eBooks (10% of total collection)	100%	
➤ Purchase of hardware for the CSIDS and the Integrated Library System (ILS)	100%	
➤ Installation of hardware for CSIDS in the OUHK	100%	
➤ Installation of hardware for ILS in CIHE and TWC	120%	
➤ Development of ILS in CIHE	100%	
Overall Project	17%	
** Please seek prior approval from the Education Fund Secretariat if the project milestones cannot be completed at the end of the reporting period.		

3. Project variation (a separate written application should be submitted to the Education Fund Secretariat for prior written approval.)

Descriptions of variations (e.g. change of the project scope or duration, deferral of completion date, relocation of an amount exceeding 10% between items of expenditure in the budget)	Date of approval sought from Education Fund Secretariat
➤ Fund handling using reimbursement and no bank accounts for the joint grantee	13 Dec 2013
➤ The splitting of SAL post into two ALI/II posts	3 Jan 2014
➤ The starting date of the 18-month contract of Project staff could be delayed with contract length unchanged	12 Mar 2014
➤ Purchase of non-budgeted item <i>Millennium Patron API</i>	April 2014

Quality Enhancement Support Scheme

4. Financial position as at the end date of the reporting period

Expenditure items	Approved budget (HK\$) (a)	Committed or actual expenditure (HK\$) (b)	Balance (HK\$) [(a)-(b)]
a. Manpower	17,784,894	1,203,568.95	16,581,325.05
b. Equipment / Facilities	601,778	487,254.00	114,524.00
c. Services	5,612,172	5,564,975.60	47,196.4
d. General Expenses	25,145,000	1,968,636.34	23,176,363.66
e. Others	1,628,816	76,888.35	1,551,927.65
Total	50,772,660	9,301,323.24	41,471,336.76
<i>Project Income (if any)</i>			<i>42,945.23</i>
<i>Total Balance</i>			<i>41,514,281.99</i>