

Quality Enhancement Support Scheme

Progress Report	Project No. : T01/QESS/2013
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Reporting Period : From January 2015 (month/year) to June 2015 (month/year)

Part A

Project Title : Collection Sharing and Information Discovery System with Enriched Digital Content

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:

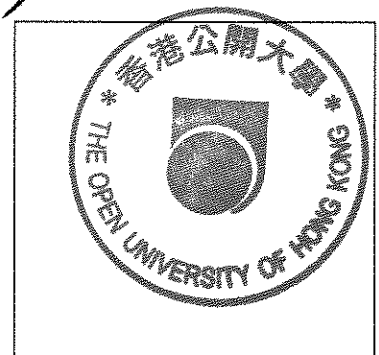
1. Types and brief descriptions of Project activities held/completed during the reporting period (*the information may be presented in the form of a table*).
2. The dates, time, venues and number of participants / beneficiaries of Project activities held, and resources (e.g. equipment, manpower) used 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

Position of Authorised Person : President
The Open University of Hong Kong

Date : 20 July 2015



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* 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

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		
Jan 2015 – Jun 2015, OUHK	A total of 22 Central Project Team (CPT) meetings have been held with project team members and representatives of the vendor “ExLibris” for the implementation of the Project. Six of them were held during this period.	For membership of CPT and IPT, please refer to the institutional Agreement
Jan 2015 – Jun 2015, CIHE	14 Internal Project Team (IPT) and a special meetings have been held by the CIHE for the implementation of its “ALEPH” Library System since the start of the project. Six of them were held during this period.	
Jan 2015 – Jun 2015, TWC	13 Internal Project Team (IPT) meetings have been held by the TWC for the implementation of its “ALEPH” Library System since the start of the project. Six of them were held during this period.	
Jan 2015 – Jun 2015, CHCHE	10 Internal Project Team (IPT) meetings have been held by the CHCHE for the implementation of its “ALEPH” Library System since the start of the project. Five of them were held during this period.	
Document Sharing and Record keeping		
Jan 2015 – Jun 2015	A total of 2,014 documents have been uploaded to the document sharing site since January 2014. 872 of them were uploaded during this period.	CPT members
Project Staff		
Feb 2015 – Mar 2015	An application for using the surplus of the staffing budget for recruiting additional staff and/or extending the contracts of existing staff was submitted to the EDB on 27 February 2015 and was approved on 3 March 2015.	EDB, CPT members
Jan 2015 – Jun 2015, OUHK	Two project support staff members departed in May 2015. One project APII departed in June 2015. All project posts except the APII post were filled in June 2015.	OUHK
Jan 2015 – Jun 2015, CIHE	The project posts were filled in March 2015.	CIHE
Jan 2015 – Jun 2015, TWC	Recruitment of Assistant Librarian II (Systems) post has been completed and the candidate would report duty on 2 July 2015.	TWC

Quality Enhancement Support Scheme

Jan 2015 – Jun 2015, CHCHE	One project Programmer joined on 4 May 2015. Recruitment of Library Assistant post (Addition) has been completed and the candidate would report duty on 2 July 2015.	CHCHE
Fund Handling and Grant Distribution		
16 Feb 2015	Grant (including the 1 st and 2 nd payments received, and the 3 rd payment to be received) distribution among members for eBook collection building was reconfirmed in the 18 th CPT meeting.	CPT members
25 Mar 2015	OUHK received the 3 rd payment of the Project Grant from the EDB.	EDB, OUHK
Others		
12 Feb 2015	The CPT members made a presentation to the Committee on Self-financing Post-secondary Education (CSPE) regarding the progress of, and the achievement made by, the Project for the period from January 2014 to December 2014.	CPT members, CSPE
Publication/ Promotion of the Project		
Late June 2015	The Project was introduced in the Concourse website < http://www.cspe.edu.hk > as one of the focuses.	EDB, CPT
June 2015, CIHE	The Project progress was reported in Issue 16 (published in June 2015) of the CIHE house magazine “Vision” http://www.cihe.edu.hk/eng/about/newsletter/vision.html	CIHE
System Implementation – progress as planned		
“Aleph” Library System for CIHE/TWC/CHCHE		
20 January 2015, OUHK	Experience sharing on the ILS system implementation; and on Cataloguing/ Circulation Module of the Aleph System	OUHK, CIHE/TWC/CHCHE
Jan 2015 – Apr 2015	Library bibliographic data migration has been successfully tested and migrated in CIHE/TWC/CHCHE.	ExLibris, CIHE/TWC/CHCHE
Jan 2015 – Apr 2015	Library circulation data migration has been successfully tested and migrated in CIHE/TWC/CHCHE.	ExLibris, CIHE/TWC/CHCHE
Jan 2015 – Apr 2015	Patron loading program has been successfully tested in CIHE/TWC/CHCHE. Daily loading has been scheduled.	ExLibris, CIHE/TWC/CHCHE
16 Feb 2015, OUHK	Experience sharing on the Acquisition/ Serials Module of the Aleph System	OUHK, CIHE/TWC/CHCHE
2 Mar 2015 - 6 Mar 2015, OUHK	The fourth (the last) round of training of the “ALEPH” Library System has been completed.	ExLibris, OUHK, CIHE/TWC/CHCHE
2 Apr 2015, CIHE	The old library system “SLS” has been successfully migrated to the new “Aleph” library system.	ExLibris, CIHE

Quality Enhancement Support Scheme

3 Apr 2015, TWC	The old library system "SLS" has been successfully migrated to the new "Aleph" library system.	ExLibris, TWC
29 Apr 2015, CHCHE	The old proprietary library system has been successfully migrated to the new "Aleph" library system.	ExLibris, CHCHE
Apr 2015 –	Post migration follow-up, including data fixing, fine-tuning of system configuration, fine-tuning of library procedure, establishing housekeeping routines, etc. has been started.	ExLibris, CIHE/TWC/CHCHE
"Primo" searching and discovery layer		
19 May 2015	The second round of training of the "Primo" searching and discovery layer has been scheduled for 16-17 July 2015.	ExLibris, CIHE/TWC/CHCHE/ HKSYU/OUHK
May 2015 – June 2015	Daily extraction of data from the new "Aleph" library systems of CIHE/TWC/CHCHE and from the "Millennium" library system of HKSYU for importing into the Project "Primo" website have been arranged and tested.	ExLibris, CIHE/TWC/CHCHE
11 June 2015, OUHK	Searching across all member institutes was set up in the OUHK under the CSIDS "Primo". The search was named "Union Search". It could be accessed via the following link: http://primo.csids.edu.hk/primo_library/libweb/action/search.do?vid=OUHK	ExLibris, OUHK
June 2015 -	Fine-tuning of the "Union Search" for better de-duplication, merging, FRBR, and record presentation; including fixing of members' data, development of common data normalization rules, modification of user interface, updating of the system configuration to meet the need of the members, has been started.	ExLibris, CPT members
Interlibrary Loan (ILL)		
10 Mar 2015	Innovative Interfaces Inc., vendor of the product <i>Millennium ISO ILL Module</i> , officially confirmed that its product cannot support the required ISO protocols. Order of the product has been cancelled.	Innovative Interfaces Inc.
21 April 2015	Based on the study carried out by the HKSYU which analyzed the various ILL products, including off-the-shelf commercial ILL product and open source ILL products, it was agreed in the 20th CPT meeting that commercial products would be preferred.	HKSYU
May 2015 – June 2015	A commercial ILL product "Relais" was being tested by the HKSYU and the testing results have been reported to the vendor for follow up.	HKSYU
19 May 2015	ILL Policies for physical books were confirmed in the 21 st CPT meeting (For details, please refer to Annex D). It was agreed that the Policies	CPT members

Quality Enhancement Support Scheme

	will be reviewed in 2016.										
June 2015	The ILL Module of the Aleph System in the OUHK has been made ready for sending and receiving interlibrary loan requests to/from member institutes.	OUHK									
Collection Development and eBook Purchases – in order											
20 Jan 2015	<i>Collection Development Guidelines</i> has been updated and approved in the 17 th CPT meeting. (For the updates, please refer to Annex II)	CPT members									
20 Jan 2015 - 18 Jun 2015	<i>Ebook Requirements</i> for vendors has been updated and approved in the 17 th , 18 th and 22 nd CPT meeting. (For details, please refer to Annex III)	CPT members									
Jan 2015 – Jun 2015	14 proposals from eBook vendors have been accepted by the CPT and 12 license agreements have been signed since January 2014. 1 proposal and 1 license agreement of them were accepted / signed within this period.	CPT members									
Jan 2015 – Jun 2015	No. of new titles collected by the OUHK and sent to member libraries for selection: (Figures in italics are the cumulative total since January 2014.)	OUHK									
	<table border="1"> <thead> <tr> <th>English</th> <th>Chinese</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>15,090</td> <td>3,634</td> <td>18,724</td> </tr> <tr> <td><i>(41,109)</i></td> <td><i>(8,791)</i></td> <td><i>(49,900)</i></td> </tr> </tbody> </table>	English	Chinese	Total	15,090	3,634	18,724	<i>(41,109)</i>	<i>(8,791)</i>	<i>(49,900)</i>	
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Jan 2015 – Jun 2015	Subject keywords and profiles set up for the following disciplines: <ul style="list-style-type: none"> • Auxiliary Sciences of History • Sociology and Social Work • Bibliography, Library Science, Information Resources • General Works 	CPT members									

Quality Enhancement Support Scheme

Jan 2015 – Jun 2015	<p>eBook recommendations submitted by member libraries:</p> <p>(Figures in italics are the cumulative total since January 2014.)</p> <table border="1"> <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>1,510 <i>(6,894)</i></td> <td>226 <i>(2,015)</i></td> <td>1,736 <i>(8,909)</i></td> </tr> <tr> <td>CIHE</td> <td>1,650 <i>(8,094)</i></td> <td>373 <i>(1,417)</i></td> <td>2,023 <i>(9,511)</i></td> </tr> <tr> <td>CHCHE</td> <td>2,172 <i>(5,834)</i></td> <td>1,368 <i>(4,484)</i></td> <td>3,540 <i>(10,318)</i></td> </tr> <tr> <td>HKSYU</td> <td>1,337 <i>(9,308)</i></td> <td>388 <i>(996)</i></td> <td>1,725 <i>(10,304)</i></td> </tr> <tr> <td>TWC</td> <td>1,420 <i>(6,474)</i></td> <td>152 <i>(786)</i></td> <td>1,572 <i>(7,260)</i></td> </tr> <tr> <td>Total</td> <td>8,089 <i>(36,604)</i></td> <td>2,507 <i>(9,698)</i></td> <td>10,596 <i>(46,302)</i></td> </tr> </tbody> </table>	Institutes	No. of recommendations submitted			English	Chinese	Total	OUHK	1,510 <i>(6,894)</i>	226 <i>(2,015)</i>	1,736 <i>(8,909)</i>	CIHE	1,650 <i>(8,094)</i>	373 <i>(1,417)</i>	2,023 <i>(9,511)</i>	CHCHE	2,172 <i>(5,834)</i>	1,368 <i>(4,484)</i>	3,540 <i>(10,318)</i>	HKSYU	1,337 <i>(9,308)</i>	388 <i>(996)</i>	1,725 <i>(10,304)</i>	TWC	1,420 <i>(6,474)</i>	152 <i>(786)</i>	1,572 <i>(7,260)</i>	Total	8,089 <i>(36,604)</i>	2,507 <i>(9,698)</i>	10,596 <i>(46,302)</i>	CPT members
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Quality Enhancement Support Scheme

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<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>																						

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
➤ Purchase of eBooks	100%	
➤ Implementation of CSIDS in OUHK	100%	
➤ Development of the CSIDS in HKSYU	100%	
➤ Development of ILS in CHCHE	100%	
➤ Launching of ILL Module in OUHK	100%	
Overall Project	50% as expected	
<p>** Please seek prior approval from the Education Fund Secretariat if the project milestones cannot be completed at the end of the reporting period.</p>		

Quality Enhancement Support Scheme

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
An application for using the surplus of the staffing budget for recruiting additional staff and/or extending the contracts of existing project staff	3 March 2015

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	17,784,894.00	6,499,948.27	11,284,945.73
b. Equipment / Facilities	601,778.00	487,254.00	114,524.00
c. Services	5,612,172.00	5,491,267.00	120,905.00
d. General Expenses	25,145,000.00	12,545,608.55	12,599,391.45
e. Others	1,628,816.00	82,977.45	1,545,838.55
	50,772,660.00	25,107,055.27	25,665,604.73
Project Income	0.00	-125,742.04	125,742.04
Total Balance	50,772,660.00	24,981,313.23	25,791,346.77