

# 協調合作 - 共創價值

## Creating Value Through Collaboration

雲端時代之圖書館服務平台研討會, Oct. 2016

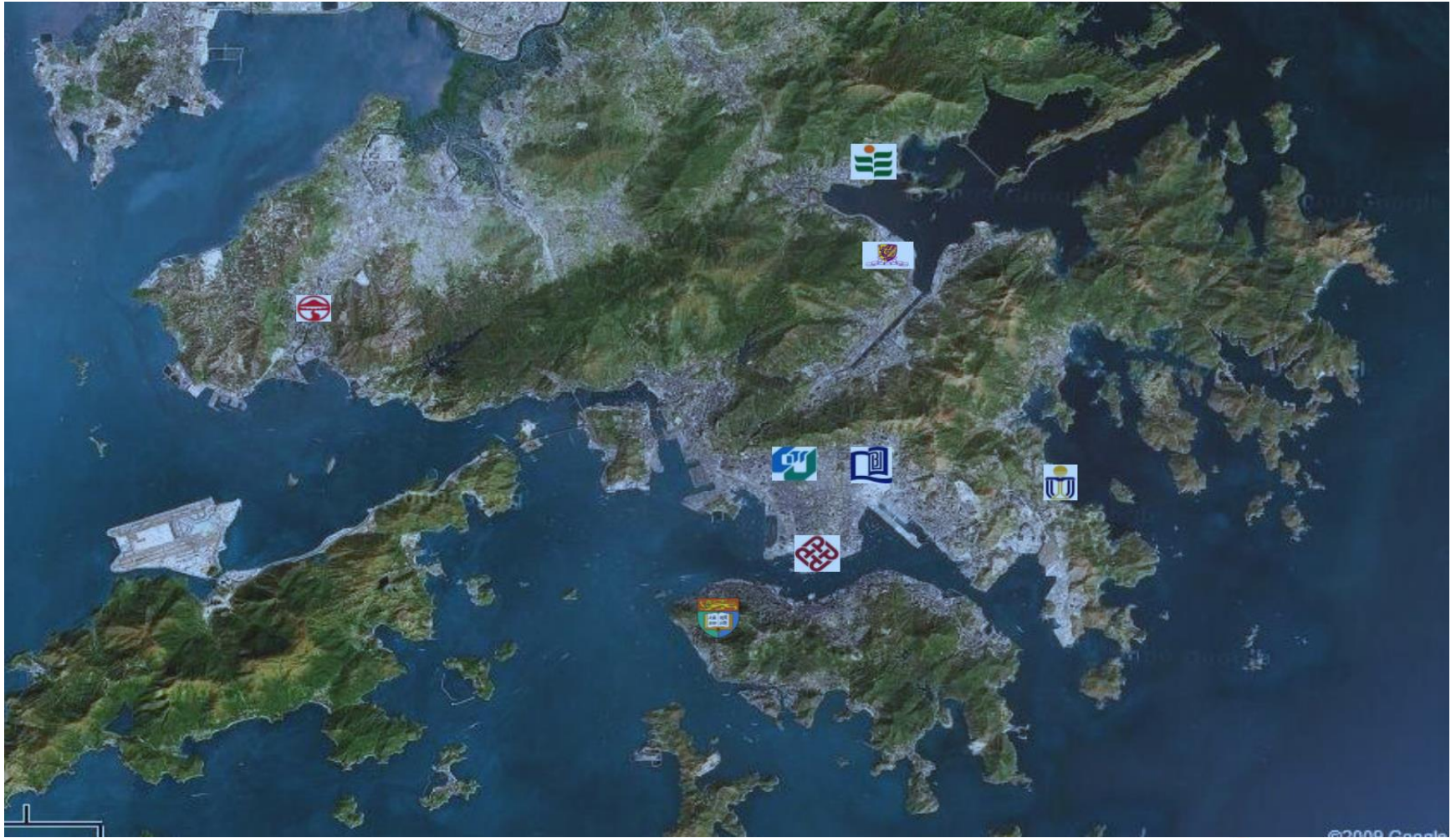
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# JULAC

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- ❑ Established in 1967, reports to Heads of Universities
  - 成立於1967年, 向 大學校長會報告
- ❑ A forum to discuss, coordinate and collaborate on library matters
  - 一個討論、協調及共創圖書館服務的平台
- ❑ Comprise of 8 public universities funded by the University Grants Committee (UGC)
  - 由香港特區八所 受教育資助委員會資助的大學圖書館組成
- ❑ Commitment and willingness
  - 有承諾並樂意參與

# JULAC



# Why Do Libraries Collaborate?

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- ❑ Common challenges
- ❑ Mutual benefits
- ❑ Geographical opportunities
- ❑ Cost efficiency
- ❑ Support from funding bodies
- ❑ Support from home institutions
- ❑ Opportunity for innovation
- ❑ New enabling technologies

# 為什麼 JULAC 要合作？

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- 共同的挑戰 ✓
- 互相受惠 ✓
- 善用地利和物流優勢 ✓
- 經費有效運用 ✓
- 經費組織的支持 ✓ ~ UGC 以及 HUCOM
- 大學的支持 ✓
- 創新服務的機會 ✓
- 新科技的推動 ✓ ~ HKALL

# From Collaboration to Deep Collaboration?

<b>Collaboration</b> 合作	<b>Deep Collaboration</b> 深入合作
Low Risk 低風險	High Risk 高風險
Low Complexity 低複雜度	High Complexity 高複雜性
Low Rewards 低回報	High Rewards 高低回報

# Major Current Collaborations

## 目前主要的合作

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- Consortia Purchasing and Licensing: Print & digital
  - 聯購與合同談判
- Reciprocal Borrowing and Access to Collections
  - 圖書互借, 讀者互訪
- Interlibrary Loan/Document Delivery
  - 館際互借/文獻傳遞
- Cooperative Cataloging
  - 合作編目

# How to Move Toward Deeper Collaboration

## 怎麼走向深入合作

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- Build and share Collections
  - 共同發展館藏與館藏共享
- JURA
  - 大學聯合典藏學術書庫
- A Single Shared ILS
  - 使用同一個圖書館管理系統
- Shared Staff Development
  - 員工共同培訓
- Enhance Information Literacy
  - 提升信息素養教學



# Why a Single Shared ILS?

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- A desire to move up to next generation ILS
- Long term cost efficiency
- Create flexibility to reallocate resources for new initiatives
- As a foundation for deep collaboration

# Moving Toward a Single Shared ILS-1

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- 2014: Worked with a consultant to conduct a study on the current status of shared ILSs
- June 2014: Accepted the recommendation to jointly acquire a cloud-based ILS to replace the current 9 systems
- Oct. 2014: Established an ILS Working Group to prepare for RFP and Tendering
- A MOU signed by all parties, that once committed, nobody would pull out of the process

# Moving Toward a Single Shared ILS-2

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- Between Sept. 2014 – Aug. 2015:
  - Investigate Options
  - Preparing RFP, Demos
  - **5 Functional Subgroups** were formed in Nov. 2014 to develop functional requirements
  - Agreed on HKU acting as the tendering institution; followed HKU's scoring methods
  - July 2015: Issued Open Tender
  - 31August 2015: Tender Closed

# Moving Toward a Single Shared ILS-3

- Between Sept. 2015 – Jan. 2016
  - Developed evaluation criteria, scoring sheets & demonstration scripts
  - Sept. 2015: Pre-demo interviews
  - Sent demo scripts to selected vendors
  - Nov.2015: Product Demonstrations
  - Dec.2015: Evaluation and Recommendation
  - Jan. 2016: Final report with recommendation to HKU Tender Board.
  - HKU approval and then endorsements from respective universities
  - April: Informed selected vendor

# ILS Migration

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- ❑ Hired a Project Manager
- ❑ Established an Implementation Committee
- ❑ Pre-project migration preparations
- ❑ July 2016: Official kicked off
- ❑ Alma training, data test load, initial configurations, more testing, training, etc.
- ❑ Oct.->: Alma in Production Server
- ❑ Nov.->: Load Alma data into Primo
  - Primo Front End setup, training, testing, etc.
- ❑ June 2017: System cutover
- ❑ July 2017: Go Live

# Manage Change - 1

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- ❑ What can be changed?
- ❑ What should be changed?
- ❑ When to change?
- ❑ How to change?
- ❑ Need Help?

# Manage Change - 2

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- ❑ Expect the unexpected
- ❑ Take advantage of potential staff turnover due to system change
- ❑ Exam committee work and scope to identify potential projects
- ❑ Leverage **Change Manager's** expertise to identify and examine potential change opportunities
- ❑ Manage expectation

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謝謝!

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