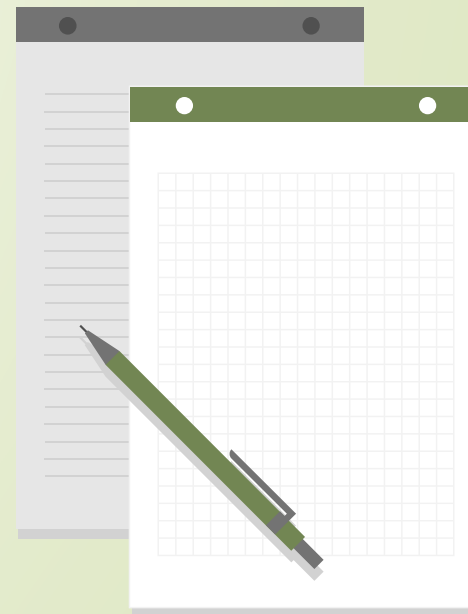


Dedicated Fund - IT Projects

Preparing Interim Report and Overall Evaluation Report Points-to-Note

**Social Welfare Department
Information Systems and Technology Branch**



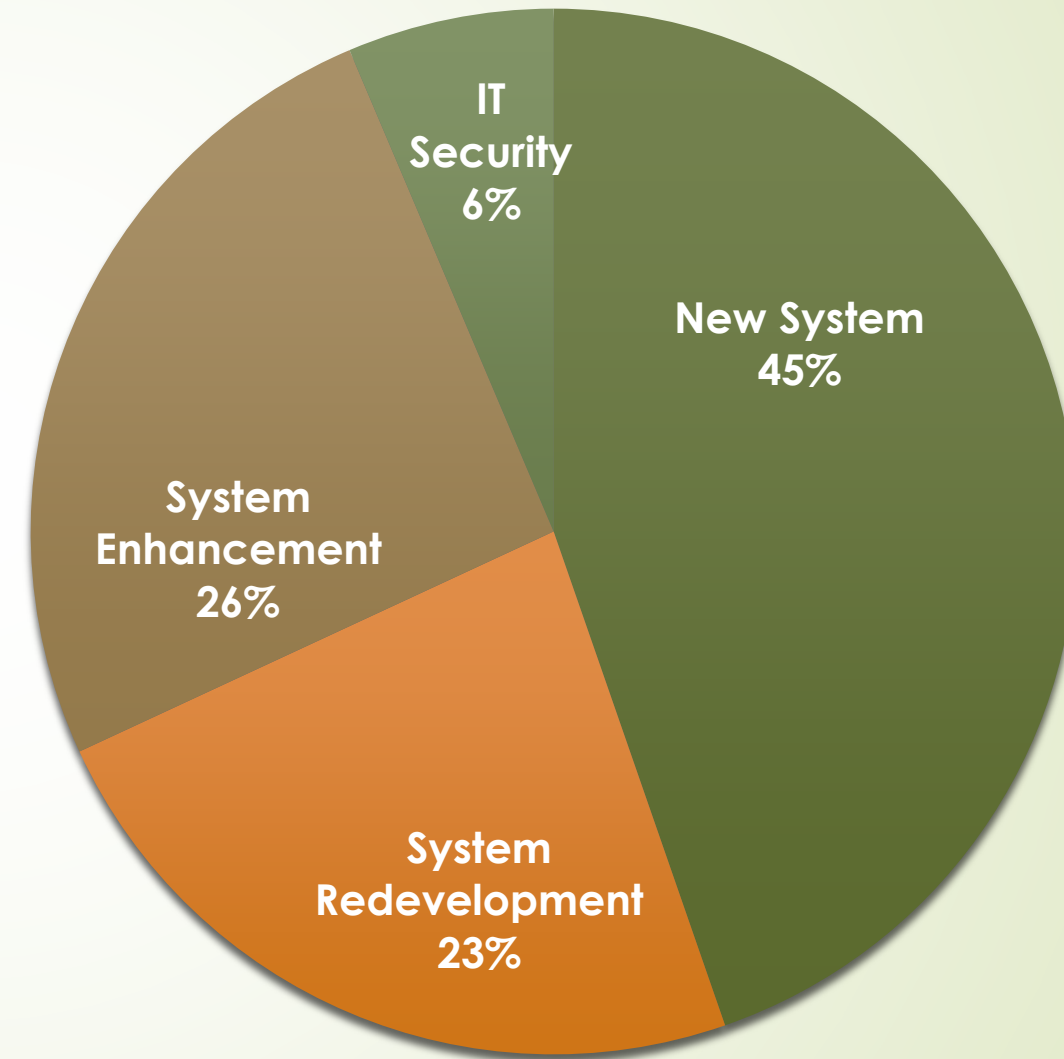


Overview on Approved IT Projects

Dedicated Fund – IT Projects

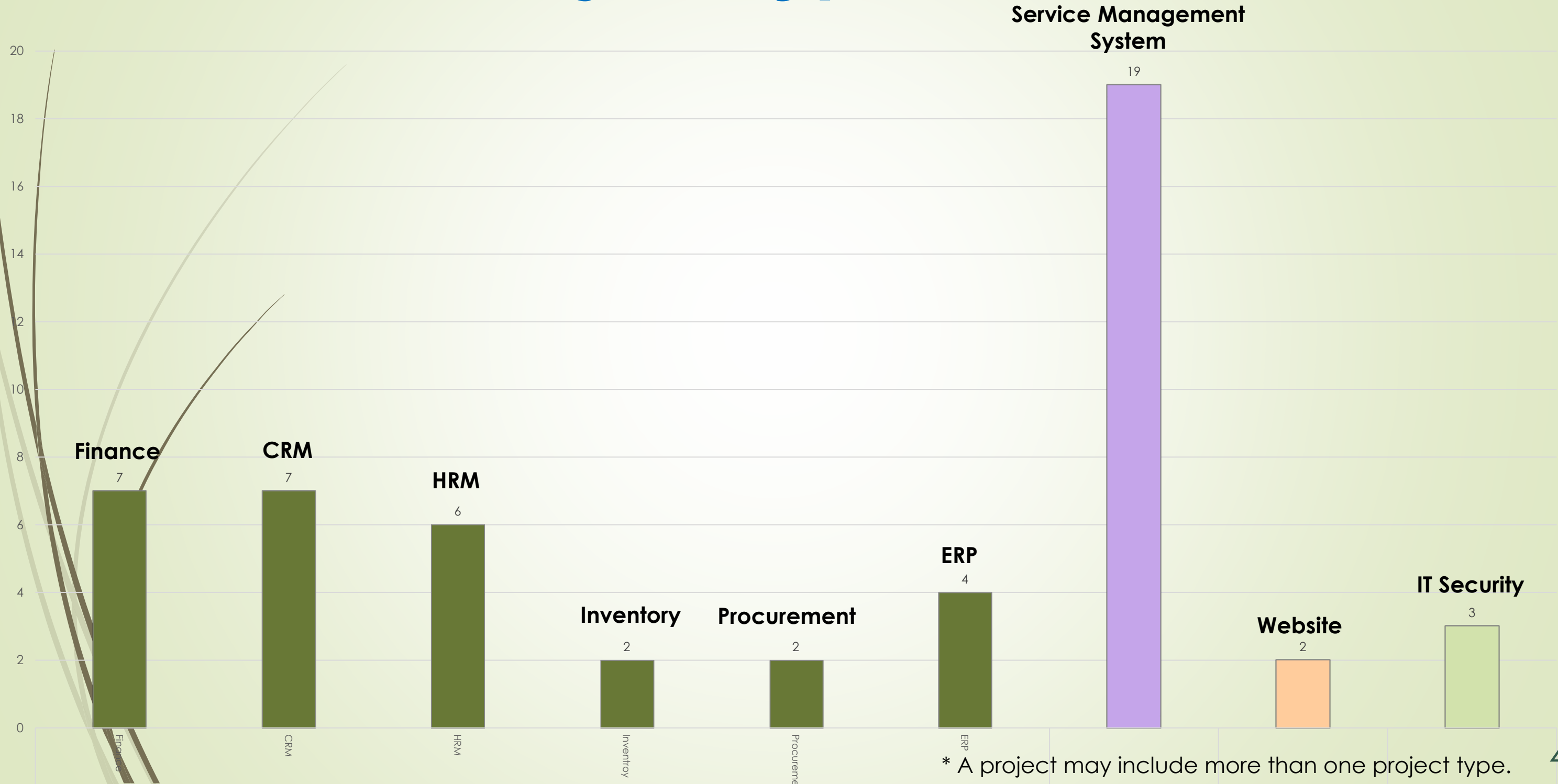
Nature of the Approved Projects

- By end-December 2025, **SWD has approved a total of 47 IT project**
- Projects include:
 - ✓ Human Resource Management System
 - ✓ Central Procurement System
 - ✓ Online Registration and Payment System
 - ✓ Case and Activity Management System
 - ✓ Enterprise Resource Planning System
 - ✓ Security Risk Assessment and Audit



■ New System ■ System Redevelopment ■ System Enhancement ■ IT Security

Project Types

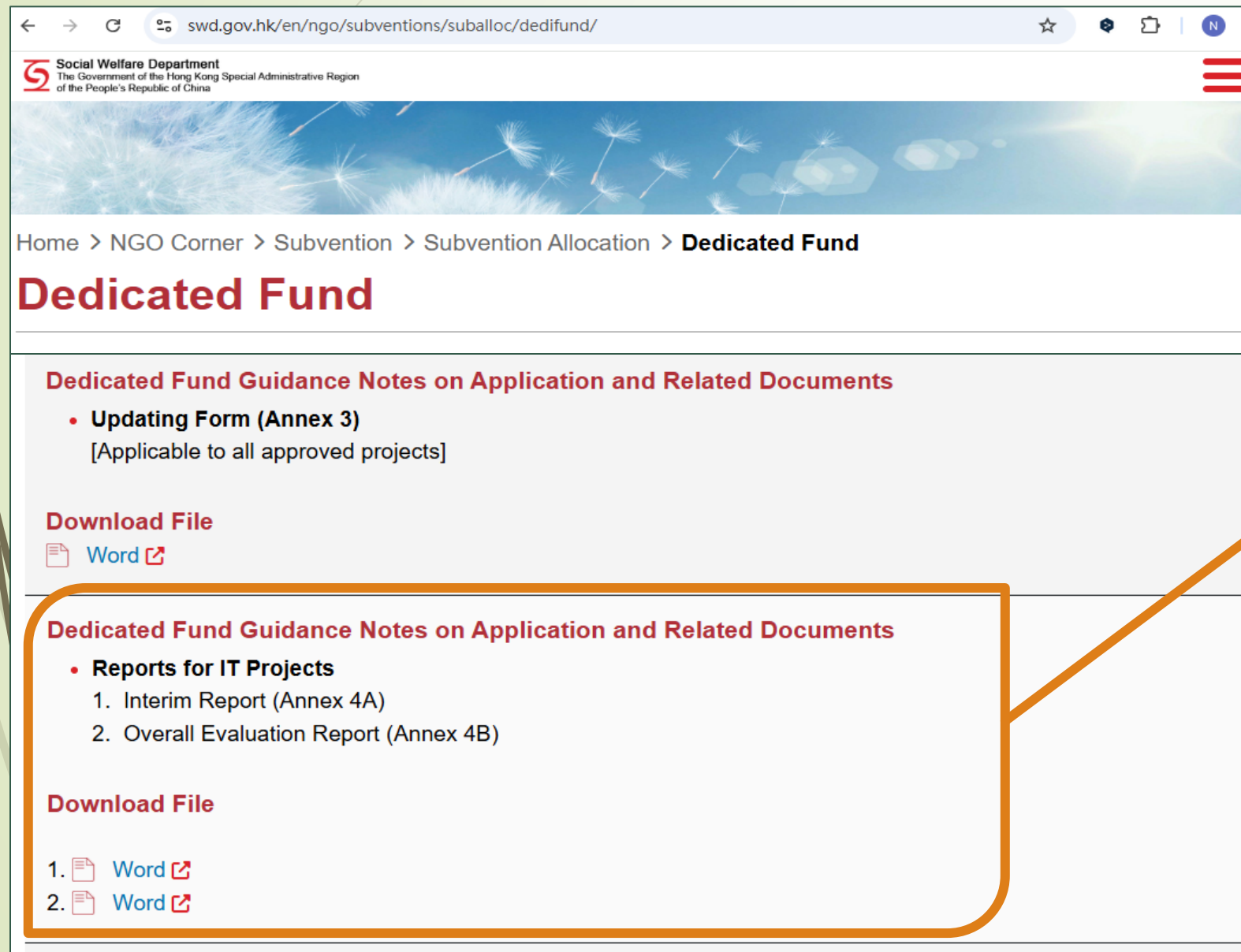


Points-to-Note in Preparation

1. Interim Report (IR)
2. Overall Evaluation Report (OER)

Download Templates

SWD Homepage (www.swd.gov.hk) > NGO Corner > Subvention > Subvention Allocation > Dedicated Fund

A screenshot of the Social Welfare Department (SWD) website, specifically the 'Dedicated Fund' page. The page is titled 'Dedicated Fund' and shows a breadcrumb trail: Home > NGO Corner > Subvention > Subvention Allocation > Dedicated Fund. The page content is divided into two main sections. The first section, titled 'Dedicated Fund Guidance Notes on Application and Related Documents', lists 'Updating Form (Annex 3)' with a note '[Applicable to all approved projects]' and a 'Download File' link for a Word document. The second section, also titled 'Dedicated Fund Guidance Notes on Application and Related Documents', lists 'Reports for IT Projects' with two items: '1. Interim Report (Annex 4A)' and '2. Overall Evaluation Report (Annex 4B)'. Each item has a 'Download File' link for a Word document. An orange arrow points from the second section to the text 'Interim Report (Annex 4A) Overall Evaluation Report (Annex 4B)' on the right. The page has a header with the SWD logo and a navigation menu, and a footer with a copyright notice.

swd.gov.hk/en/ngo/subventions/suballoc/dedifund/

Social Welfare Department
The Government of the Hong Kong Special Administrative Region
of the People's Republic of China

Home > NGO Corner > Subvention > Subvention Allocation > **Dedicated Fund**

Dedicated Fund

Dedicated Fund Guidance Notes on Application and Related Documents

- **Updating Form (Annex 3)**
[Applicable to all approved projects]

Download File

Word

Dedicated Fund Guidance Notes on Application and Related Documents

- **Reports for IT Projects**
 1. Interim Report (Annex 4A)
 2. Overall Evaluation Report (Annex 4B)

Download File

1. Word
2. Word

Interim Report (Annex 4A)
Overall Evaluation Report (Annex 4B)

Interim Report (Annex 4A)

DF Interim Report¹
Annex 4A²

**Interim Report¹
for Information Technology (IT) Project²
Dedicated Fund (DF)²**

1. Name of the NGO↓

Enter Name of the NGO

2. Name of the IT Project *[Please state the original name and the revised name, if any]*↓

Enter Name of IT Project

3. Approved IT Project²

	Original	Revised (if applicable)
Approved Amount	Original Approved Amount	Revised Approved Amount
Date of approval	Original Approval Date	Revised Approval Date

4. Has your Agency changed the implementation schedule?

☐ No ☐ Yes *[Please provide the revised schedule below]*

Planned Schedule: From Start Date (mm/yyyy) to End Date (mm/yyyy)

Revised Schedule: From Start Date (mm/yyyy) to End Date (mm/yyyy)

¹ The NGO is required to send this Interim Report to the Information Systems and Technology Branch (ISTB) of the Social Welfare Department (SWD) when the project approaches half-way of the approved implementation schedule (from the start date of the project to the completion of system nursing). Besides, the Overall Evaluation Report is required to reach ISTB within three months after the completion of system nursing. Soft copy can be sent to nga_chi_law@swd.gov.hk.

² Planned schedule as stated in Section 2.1(g) of the Application Form for the IT Project (i.e. Appendix A2).

7

Interim Report¹
for Information Technology (IT) Project
Dedicated Fund (DF)

1. Name of the NGO↓

Enter Name of the NGO

2. Name of the IT Project *(Please state the original name and the revised name, if any)*↓

Enter Name of IT Project

3. Approved IT Project

	Original	Revised (if applicable)
Approved Amount	Original Approved Amount	Revised Approved Amount
Date of approval	Original Approval Date	Revised Approval Date

4. Has your Agency changed the implementation schedule?

☐ No ☐ Yes *(Please provide the revised schedule below)*

Planned Schedule: From Start Date (mm/yyyy) to End Date (mm/yyyy)

Revised Schedule: From Start Date (mm/yyyy) to End Date (mm/yyyy)

Please refer to the **Notification Letter** issued by Subventions Branch/SWD for the **approved amount and Date of approval** (please use the date of the letter)

Provide the project's latest start and end date if there is any changes

For revision of approved amount, please submit **Updating Form (Annex 3)** in advance for seeking approval from SWD

Input the original Implementation Plan as stated in the submitted Application Form (Appendix A2)

5. Project Progress

Stage ³	Planned Start Date (mm/yyyy)	Planned End Date (mm/yyyy)	Actual / Expected Start Date (mm/yyyy)	Actual / Expected End Date (mm/yyyy)	Reasons for Deviation
Tendering	Start Date	End Date	Start Date	End Date	Enter Reasons
Project Initiation	Start Date	End Date	Start Date	End Date	Enter Reasons
System Analysis and Design	Start Date	End Date	Start Date	End Date	Enter Reasons
System Development	Start Date	End Date	Start Date	End Date	Enter Reasons
System Integration Test / User Acceptance Test	Start Date	End Date	Start Date	End Date	Enter Reasons
Data Conversion	Start Date	End Date	Start Date	End Date	Enter Reasons
System Installation	Start Date	End Date	Start Date	End Date	Enter Reasons
Security Risk Assessment and Audit	Start Date	End Date	Start Date	End Date	Enter Reasons
Privacy Impact Assessment	Start Date	End Date	Start Date	End Date	Enter Reasons
Production Rollout	Start Date	End Date	Start Date	End Date	Enter Reasons
System Nursing	Start Date	End Date	Start Date	End Date	Enter Reasons
Total Duration for Completion of the Project ⁴	Enter No. of Month(s)	Months	Enter No. of Month(s)	Months	
System Maintenance	Start Date	End Date	Start Date	End Date	Enter Reasons
Total Duration of the Project (Include System Maintenance)	Enter No. of Month(s)	Months	Enter No. of Month(s)	Months	

Reason SHOULD be provided for any deviation from the original Implementation Plan

From Tendering to System Nursing

From Tendering to System Maintenance

Describe in details the **difficulties encountered** in the process and **follow-up actions** addressing the delay in Implementation Plan

Provide **proposed measures and monitoring strategies** to ensure the project can remain on track with the revised project schedule

DF Interim Report
Annex 4A

6. Implementation Progress of the Project

Checkbox for Implementation Progress of the Project on schedule

☐ On schedule

☐ Behind schedule *[Please specify the difficulties encountered and the proposed solutions]*

Enter the implementation progress

7. Other Remarks *[Any other information relevant to the project implementation progress]*

Enter other remarks

	Prepared by:	
		(Enter the name of the person)
	Post:	Enter Post
	Tel. No.:	Enter Tel. No.
	Date:	Date
	Endorsed by:	
		(Enter the name of the person)
	Post:	NGO / Division Head
	Tel. No.:	Enter Tel. No.
	Date:	Date

Remark: Further Interim Report(s) will be required for projects with revised schedule or extended project duration. Date of submission of further Interim Report(s) will be advised by the SWD.

Overall Evaluation Report (Annex 4B)

1. Name of the NGO

Enter Name of the NGO

2. Name of the IT Project *[Please state the original name and the revised name, if applicable]*

Enter Name of the IT Project

3. Approved IT Project

	Original	Revised (if applicable)
Approved Amount	Original Approved Amount	Revised Approved Amount
Date of approval	Original Approval Date	Revised Approval Date

4. Actual Project Expenditure

HK\$: Enter Actual Project Expenditure

**Overall Evaluation Report
for Information Technology (IT) Project
Dedicated Fund (DF)**

1. Name of the NGO↓

Enter Name of the NGO

2. Name of the IT Project *[Please state the original name and the revised name, if applicable]*↓

Enter Name of the IT Project

3. Approved IT Project↓

	Original	Revised (if applicable)
Approved Amount	Original Approved Amount	Revised Approved Amount
Date of approval	Original Approval Date	Revised Approval Date

4. Actual Project Expenditure↓

HK\$: Enter Actual Project Expenditure

The principles for
completing P.1 and P.2
is the same as that of
Interim Report.

5. Project Duration↓

Stage ¹	Planned Start Date (mm/yyyy)	Planned End Date (mm/yyyy)	Actual Start Date (mm/yyyy)	Actual End Date (mm/yyyy)	Reasons for Deviation
Tendering	Start Date	End Date	Start Date	End Date	Enter Reasons
Project Initiation	Start Date	End Date	Start Date	End Date	Enter Reasons
System Analysis and Design	Start Date	End Date	Start Date	End Date	Enter Reasons
System Development	Start Date	End Date	Start Date	End Date	Enter Reasons
System Integration Test / User Acceptance Test	Start Date	End Date	Start Date	End Date	Enter Reasons
Data Conversion	Start Date	End Date	Start Date	End Date	Enter Reasons
System Installation	Start Date	End Date	Start Date	End Date	Enter Reasons
Security Risk Assessment and Audit	Start Date	End Date	Start Date	End Date	Enter Reasons
Privacy Impact Assessment	Start Date	End Date	Start Date	End Date	Enter Reasons
Production Rollout	Start Date	End Date	Start Date	End Date	Enter Reasons
System Nursing	Start Date	End Date	Start Date	End Date	Enter Reasons
Total Duration for Completion of the Project²	Enter No. of Month(s)	Months	Enter No. of Month(s)	Months	
System Maintenance	Start Date	End Date	Start Date	End Date	Enter Reasons
Total Duration of the Project (include System Maintenance)	Enter No. of Month(s)	Months ³	Enter No. of Month(s)	Months	

¹ Please tally with the Implementation Plan at Section 2.1(g) of the Application Form for the IT Project (i.e. Appendix A2).

² From start date of the project to end date of system nursing.

³ Please tally with the Application Form for the IT Project (i.e. Appendix A2), Section 1.1 and Section 2.1(g).

6. Has your Agency changed the implementation schedule?

☐ No ☐ Yes *[Please provide the revised schedule below]*

Revised Schedule: From Start Date (mm/yyyy) to End Date (mm/yyyy)

7. Date of Interim Report submitted: Enter Date

Dates of Further Interim Report(s) submitted (if any): Enter Date(s)

8. Project Deliverables *[Please "✓" as appropriate and provide information as applicable]*

Project Deliverable	Description
<input type="checkbox"/> Project Initiation Document	Enter Description
<input type="checkbox"/> Technical Document(s) (e.g. System Analysis and Design Report, Program Specification)	Enter Description
<input type="checkbox"/> Other IT Project Document(s) (e.g. User Acceptance Test Plan and Report, Backup and Recovery Procedure)	Enter Description
<input type="checkbox"/> Web Accessibility Compliance (For website and web-based application projects)	Enter Description
<input checked="" type="checkbox"/> System Security Measures/Manual(s) (e.g. Security Risk Assessment and Audit Report)	Enter Description
<input type="checkbox"/> Privacy Impact Assessment (e.g. Privacy Impact Assessment and Privacy Compliance Audit Report)	Enter Description
<input type="checkbox"/> User Training(s)	Enter Description
<input type="checkbox"/> User / Operation Manual(s)	Enter Description
<input type="checkbox"/> Administration Manual(s)	Enter Description

Description on the project deliverables SHOULD be provided. Please refer to below example:

Example for SRAA:

Date of SRAA report: 15 December 2025

Key findings and remediation :

- 4 high-risk and 3 medium-risk items identified; and
- Remediation plan has been implemented for the identified items.

Date of the SRAA report endorsed by the agency: 16 January 2026

9. Project Benefits *[Please “✓” as appropriate and provide information as applicable]*

Project Benefits	Description
<input type="checkbox"/> Annual Savings in Staff Effort	Enter Description
<input type="checkbox"/> Other Savings / Additional Revenue	Enter Description
<input type="checkbox"/> Improvement in Operational Efficiency	Enter Description
<input type="checkbox"/> Improvement in Service Delivery	Enter Description
<input type="checkbox"/> Improvement in Corporate Image	Enter Description
<input type="checkbox"/> Other Intangible Benefits (e.g. facilitate data sharing among units)	Enter Description

10. Difficulties Encountered *[Please “✓” as appropriate and provide information as applicable]*

Difficulties Encountered	Description and Solutions
<input type="checkbox"/> Tendering / Tenders vetting	Enter Description / Solutions
<input type="checkbox"/> Users' Requirements	Enter Description / Solutions
<input type="checkbox"/> Contractor Management	Enter Description / Solutions
<input type="checkbox"/> Staff Turnover / Manpower	Enter Description / Solutions
<input type="checkbox"/> Delay of Project (Please highlight reasons of delay)	Enter Description / Solutions
<input type="checkbox"/> Other Difficulties/ Issues (Please specify Other Difficulties)	Enter Description / Solutions

11. Employment of IT Professionals in overseeing the implementation of the Project

☐ No ☐ Yes *(Please specify: Enter the description)*

12. Lessons / Experience Learnt from the Project
Enter Lessons / Experience Learnt from the Project

13. Other Remarks (if any)
Enter other remarks

Prepared by:		(Enter the name of the person)
Post:		Enter Post
Tel. No.:		Enter Tel. No.
Date:		Date
Endorsed by:		(Enter the name of the person)
Post:		NGO / Division Head
Tel. No.:		Enter Tel. No.
Date:		Date

The NGO is required to send this **Overall Evaluation Report** to the Information Systems and Technology Branch (ISTB) of the Social Welfare Department. Soft copy can be sent to nga_chi_law@swd.gov.hk.

Report the insights and experiences gained in this IT project and critical successful factors.

Provide the result of Evaluation Mechanism stated in the Application Form (Appendix A2).

(i) Evaluation Mechanism

		If yes, please provide details
Output and Outcome Standard Measurement	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Evaluates program efficacy via predefined KPIs, tracking quantifiable outputs (e.g., deliverables) and outcomes (e.g., impacts) against benchmarks
Participants' Satisfaction Survey	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Assesses user experience through structured questionnaires, scoring feedback on relevance, quality, and satisfaction using Likert scales
Internal and External Customer Feedback	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Enter details
Other	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Enter details



Submission of IR and OER Workflow

1

Download the IR / OER template

(SWD Homepage (www.swd.gov.hk) > NGO Corner > Subvention > Subvention Allocation > Dedicated Fund)

2

Email the draft report to ISTB/SWD for comments

(Email address: nga_chi_law@swd.gov.hk)

3

Confirmation of IR / OER by ISTB/SWD

4

Upload the confirmed report to the Service Performance Management Information System (SPMIS)

Enquiry

**Miss Sarah LAW, Social Work Officer,
Information Systems and Technology (4)**

Tel: 2136 8737

Email: nga_chi_law@swd.gov.hk