

The Library and Information Services (LIS) Transformation Charter

July 2009

6th Draft

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**Commissioned by the Department of Arts and Culture (DAC)
and
National Council for Library and Information Services (NCLIS)**

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Preamble

The Parties to the Charter,

- Recalling the principles proclaimed in the Constitution of the Republic of South Africa and the Bill of Rights which recognises access to information as a human right,
- Recognising that the White Paper on Arts, Culture and Heritage (1996) established a close connection between access to information and freedom of speech,
- Recalling that the Education Laws and Amendment Act No. 31 of 2007, lists the availability of the library as a minimal national norm and standard for school infrastructure,
- Noting that in the information age access to information is decisive and a source of wealth and power,
- Emphasising the importance of the Library and Information Services Sector as an integral part of reconstruction and sustainable development,
- Emphasising further the importance of the sector in redressing historical inequalities, poverty eradication, social cohesion and growing the economy,
- Concerned that despite attempts by Government since the transition to democracy in 1994, the literacy level and the culture of reading still leave much to be desired by international standards,
- Mindful of the fact that the future of the sector lies in its human resources and in investing in people's capabilities,
- Mindful, further, that public libraries form part of the bigger goals of government programmes including programmes such as ASGISA and JIPSA,
- Convinced that a comprehensive Charter to promote and develop the Library and Information Service Sector will make a significant contribution to the development of a just, prosperous and cohesive society,

Have agreed as follows:

Preface

In April 2008, the National Council for Library and Information Services (NCLIS), in consultation with the Department of Arts and Culture (DAC), brought together seven people to form the Library and Information Services Transformation Charter Technical Team. They were invited, not as representatives of organizations and institutions, but in their individual and personal capacities. Most of them are from the Library and Information Services (LIS) sector and have varied experience as academics, practitioners, policy development experts and public officials.

Their assignment was: to define the challenges facing the sector and to provide a clear framework of principles and mechanisms for effecting the changes needed for the sector to contribute to the elimination of illiteracy and inequality, and build an informed and reading nation.

The starting point was the recognition that, in the information age, access to information is crucial and is a source of wealth and power. Access to information makes better people, more efficient and effective workers, and more responsive and responsible citizens. So, rather than considering the library as the site for the training of young elite, we should rethink the library as an institution, as a special place for everybody, as accompanying all South Africans throughout their lives. It should be systematically integrated into the economy and society as the preserver and transmitter of knowledge and information.

For the majority of people in developing countries the lack of information is the main impediment to their own development. This state of affairs is due not only to scarce material resources, but also to a lack of appreciation of the developmental role which the library and information sector plays. In our opinion there is no more important developmental policy than one oriented towards eradicating information illiteracy and building a modern, efficient, and equitable library and information system.

Both Government, together with its social partners, the private sector, civil society organizations, households and international aid agencies, should support this. It is in the national and global interest to make South Africa a more information literate nation. What is clear is that if Government does not create the right conditions for the development of the sector, no amount of support from its social partners will succeed in this endeavour.

The Charter's recommendations are based on the careful examination of all the evidence available to assess what is required to augment the sector's capacity to contribute in a sustainable way to the elimination of inequality and poverty. The Team consulted extensively with scholars, practitioners, users of services, civil society and political leaders both inside and outside the sector.

The Team has met individuals and groups from each of the nine provinces. They have received numerous formal submissions and have made a particular effort to engage with both policy implementers and policy beneficiaries. NCLIS is enormously grateful to all the individuals and groups for their contributions.

The first draft was presented to the Minister of Arts and Culture in July 2008, a few days before he opened the new building of the National Library in Pretoria. The second draft was presented to the National Summit early in December 2008 for public scrutiny and deliberation. In this the final draft, the Charter is presented in the form of argument and recommendations. The argument is developed under the headings "Overview", "Challenges" and "Objectives". This is the basis for action. The elements of the argument and recommendations are designed to serve as a comprehensive but succinct statement of findings.

Integral parts of this Charter are the analysis and evidence that outline the substance and basis of our recommendations. The special challenges confronting the school library sub sector in all the nine provincial public consultations require much more comprehensive and detailed analysis. The Charter will be available in English on DAC's website. Suggestions for further reading and deliberation appear at the end of the Charter.

The Charter speaks to diverse audiences: decision-makers in Government who must drive forward the program of transformation of the people as set out in the Bill of Rights and the Reconstruction and Development Program (RDP); the rich and the educated elite of our society who must take a strong lead for action in partnership with Government; international aid agencies, which must assist Government in its commitment for greater action on the Millennium Development Goals. It is addressed to all the citizens of South Africa. It is South African citizens who must demand action and whose voices will determine whether Government takes strong, prompt and sustained action.

The recommendations proposed constitute a coherent plan for South Africa. They should be implemented together as aspects of the same organic vision. 2009 is the year of our fourth democratic elections and just six years before the target year for the Millennium Development Goals to halve poverty and eradicate illiteracy by 2015. It is the year to take decisions that will demonstrate our resolve to turn the vision of an informed and reading nation into a reality.

There are difficulties to be contended with. The difficulties facing the effort to build an informed and reading nation are not contingent or mechanistic, nor are they questions of institutional engineering. They are of a deeper nature. Our starting point in addressing them relates back to some of the key factors in the crisis of our democracy referred to in the *Macro-Social Trends Report* (2004), in particular the spread of moral degeneration, poverty and passivity which has been prevalent amongst our people.

In analysing the causes of this condition and what can be done about it, it is necessary to say something, however briefly, about social trends in the last fifteen years. Although they do not all point in the same direction, they cannot be said to have helped to make our democracy more vital or more present in people's lives. What is deeply worrying is that there are all too few public spaces for and processes of education and training in information literacy. Consequently there are all too few public spaces for and processes of informed discussion and participation in decision-making. Most citizens are either uninformed or 'privatised' in their habits, thoughts and daily practices.

While it is certainly true that access to education has been widened and that the internet and many other instruments are democratising access to information, the largest single cultural influence on families, especially the upper classes, remains the television. The oligarchic structure and conformist tendencies of national and global television have the effect of inhibiting the solid transmission of democratic and participative values. Thus, highly focused strategies for eradicating illiteracy and building an information literate citizenry are urgent. The best strategies combine step-by-step implementation and monitoring plans with an integrated body of knowledge across disciplinary boundaries. Using this framework to inform action plans on the ground and organizing the feedback of implementation would result in an integrated body of knowledge.

Definitions, abbreviations and acronyms

ACE	Advanced Certificate in Education	MTEF	Medium-Term Expenditure Framework
ASGISA	Accelerated and Shared Growth Initiative for South Africa	NCLIS	National Council for Library and Information Services
CEPD	Continuing Education for Professional Development	NEIMS	National Education Infrastructure Management System
CHELISA	Committee for Higher Education Librarians in South Africa	NLPF	National Language Policy Framework
CICD	Centre for Information Career Development	NLSA	National Library of South Africa
DAC	Department of Arts and Culture	NQF	National Qualifications Framework
DoE	Department of Education	OBE	Outcomes-based education
DPSA	Department of Public Service and Administration	OSALL	Organisation of South African Law Libraries
ELITS	Education Library Information and Technology Services	PIRLS	Progress in International Reading Literacy Study
ETQA	Education and Training Quality Assurance	RDP	Reconstruction and Development Programme
GDP	Gross domestic product	SAOUG	Southern African Online User Group
HESA	Higher Education South Africa	SAQA	South African Qualifications Authority
HOD	Head of Department	SGB	Standards Generating Body
HSRC	Human Sciences Research Council	SLIS	Special Libraries and Information Services
ICT	Information and Communication Technology	SLYSIG	School Library and Youth Services Interest Group
IFAP	Information for All Programme	UNESCO	United Nations Educational, Scientific and Cultural Organization
IFLA	International Federation of Library Associations and Institutions	UWC	University of the Western Cape
ISASA	Independent Schools Association of South Africa	WCED	Western Cape Education Department
ISO	International Standards Organisation		
JIPSA	Joint Initiative for Priority Skills Acquisition		
KZN	KwaZulu-Natal Province		
LIASA	Library and Information Association of South Africa		
LIS	Library and Information Services		
LISLIG	LIASA Special Libraries Interest Group		
LTSM	Learning and Teaching Support Materials		

Definitions

Access	In this document refers to the degree to which the facilities and services of libraries are accessible by as many people as possible. Accessibility can be viewed as the “ability to access” the functionality, and benefit, of libraries. This includes distance and transport, building design, assistive technology, relevant and usable content of resources, suitable format of resources, and the languages of the resources and spoken by the staff. Accessibility is also used to focus on people with disabilities and their right of access to library services.
Articulated system	A system of interconnected parts that work together.
Basic literacy	The minimum ability to read and write.
Borderless libraries	Connects all publicly funded libraries to each other so that users may access information and material from any library anywhere in the city, province or country, either in person or online.
Community library	A library that originates with the community and is funded and run by the community. Also used as a synonym for public library (q.v.).
Digital curation	Digital curation is the curation, preservation, maintenance, and collection and archiving of digital assets. Digital curation is the process of establishing and developing long term repositories of digital assets for current and future reference by researchers, scientists, and historians, and scholars generally.
Digital divide	The term digital divide refers to the gap between people with effective access to digital and information technology and those with very limited or no access at all. It includes the imbalances in physical access to technology as well as the imbalances in resources and skills needed to effectively participate as a digital citizen. In other words, it is the unequal access by some members of society to information and communications technology, and the unequal acquisition of related skills.

Digital media	Digital media refers to electronic media that work on digital codes.
Digital technology	An electrical data storage and transmission technology that processes information in binary strings of 1’s (and 0’s. This is the foundation of computing and of high-end multimedia systems (HDTV, direct broadcast satellite, online video and so on).
Digitisation	The Canadian government defines digitisation as “The conversion of images, characters, or sounds to digital codes so that the information may be processed or stored by a computer system.”
e-Learning	A term covering a wide set of applications and processes, such as Web-based learning, computer-based learning, virtual classrooms, and digital collaboration. It includes the delivery of content via Internet, intranet/extranet (LAN/WAN), audio and videotape, satellite broadcast, interactive TV, CD-ROM, and more. www.usnews.com
Functional literacy	A level of reading and writing sufficient for everyday life.
Global knowledge economy	The new forms and increasing networking of economy and society that are developing from information and communication technologies and the development of new knowledge.
Indigenous knowledge systems	Indigenous knowledge systems refers to the content or substance of knowledge resulting from intellectual activity in a traditional context and includes the know-how, skills, innovations, practices and learning that form part of (un)codified knowledge passed between generations.
Information literacy	Information literacy is often described as the literacy needed to function in the information society. It refers to the ability to access, use and evaluate information from different sources, to enhance learning, solve problems and generate new knowledge.

Information society “A people-centred, inclusive and development-oriented society, where everyone can create, access, utilize and share information and knowledge, enabling individuals, communities and peoples to achieve their full potential in promoting their sustainable development and improving their quality of life, premised on the purposes and principles of the Charter of the United Nations and respecting fully and upholding the Universal Declaration of Human Rights” (World Summit on Information Society. 2003. Declaration of Principles.)

Knowledge management A process of collecting, organising, storing, exploiting and disseminating information and data held in an organisation especially information known to individuals as well as the general store of known information.

Knowledge society A term preferred by UNESCO to Information Society since they argue that enhancing information flow does not guarantee the development that is offered by knowledge. There is a more “comprehensive holistic and comprehensive vision and a clearly developmental perspective. The main challenge of the knowledge society is to narrow the digital divide that accentuates disparities in development, excluding entire groups and countries from the benefits of information and knowledge; to guarantee the free flow of equitable access to data, information, best practices and knowledge” (Khan, 2004).

Open access The provision of free and easy access to information and knowledge. It removes the barriers in traditional scholarly publishing and licensing.

Public library A public library is a library set up by government authorities, at local, provincial or national level, to serve a geographic area or community. The IFLA/UNESCO *Public Library Manifesto* (1995) states that in principle the public library shall be free of charge. It also suggests that public library services must be adapted to the different needs of rural and urban areas and that the public library network must be designed in relation to other kinds of libraries, including those in schools, colleges and universities.

Records management The practice of identifying, classifying, archiving, preserving, and destroying records.

School LIS The Charter chooses the term “school LIS” in preference to other possible terms found in the professional literature – for example “media centre”, “resources centre”, “learning resources centre”, “school library media centre”, “resource collection”. They all refer to a collection of literature, information and learning resources, within a school or close-by, organised for the use of teachers and learners. Usually the school LIS implies a central collection, although other models include decentralised classroom collections and “virtual libraries”, which provide access to resources via the Internet and other networks.

Service learning The US Department of Education defines service learning as “An educational activity, program, or curriculum that seeks to promote students’ learning through experiences associated with volunteerism or community service.”

Social model of disability The social model of disability proposes that barriers and prejudice and exclusion by society (purposely or inadvertently) are the ultimate factors defining who is disabled and who is not in a particular society. It recognises that while some people have physical, intellectual, or psychological differences from a statistical mean, which may sometimes be impairments, these do not have to lead to disability unless society fails to accommodate and include them in the way it would those who are ‘normal.’

School librarian A school librarian is a person responsible for the management and use of a school library, and for teaching information skills.

Virtual library and information services Monash University defines virtual library and information services as “access to electronic information in a variety of remote locations through a local online catalogue or other gateway, such as the internet”.

Wireless technology Wireless communication is the transfer of information over a distance without the use of electrical conductors or “wires”. The distances involved may be short (a few meters as in television remote control) or long (thousands or millions of kilometers for radio communications). It encompasses various types of fixed, mobile, and portable two way radios, cellular telephones, personal digital assistant (PDAs), and wireless networking.

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Professor Rocky Ralebipi-Simela, as the Chairperson of NCLIS, provided strategic guidance and encouragement. She attended some of the Provincial Consultation meetings, and made herself available when the Technical Team needed advice on specific issues. The Deputy Chairperson and members of NCLIS offered support and direction at consultation meetings with the Technical Team, and assisted in many ways. Mrs Segametsi Molawa was the Programme Director at some of the Provincial Consultation meetings. Mr Haffy Haffajee arranged many consultations with LIS stakeholders, and gave practical advice to the Technical Team based on his extensive experience.

The members of the Reference Group provided constructive criticism and suggested additions that helped to shape the Charter as it developed through several drafts. Also at the highest levels, the National Librarian, Mr John Tsebe, offered his time, advice, and the facilities of the NLSA to the Technical Team, and he served as a valuable link with strategic LIS stakeholders. He attended all the Provincial Consultation meetings where his opening presentation set the tone for subsequent discussions. It is self-evident that the management of a project that is national in its scope demands special management skills, energy, and patience. These were supplied in a highly professional manner by the project managers Mr Mandlakayise Matyumza, Mr Thabo Makupula and Ms Tshidi Ramano.

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Colleagues from the University libraries sub-sector who made suggestions to improve the Charter included: Ms Claire Walker, Deputy University Librarian, University of Witwatersrand; Ms Denise Nicholson, University of the Witwatersrand; Ms Barenise Peffer, Helderberg College; Mr Roy Raju on behalf of CHELSA; Mr Chuene Makgabela, Acting Director, University of Limpopo Library; and Ms Ina Smith, University of Pretoria Library. Academic librarians contributed to the Charter in a number of ways, and a group of academic librarians from CHELSA had discussions with the Technical Team on various issues. Ms Ellen Tise, Director of Library Services, University of Stellenbosch and President-Elect of IFLA, made constructive suggestions both regarding the Charter process and its contents.

Valuable discussions on School libraries were held with Mrs Rose Damon and Mrs Lyne Mclennan, EDULIS, Western Cape Education Department; Mrs Mbaza, Eastern Cape School Library Services; Mrs Elsie Mbatha and Mrs Nomawehtu Jonas, Eastern Cape Department of Education; Ms N I Gxwati, Free State School Library Services; Ms Refilwe Masondo, Free State Department of Sports, Arts & Culture; Ms Chantelle Rose, Free State Department of Education; Mr F K Dubazana and Ms M du Toit, KwaZulu-Natal Department of Education; Mr Leon de Vries, Northern Cape Department of Education, and Mr Khumbulani Ndawo, Mpumalanga Education Department.

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Chairperson: LIASA-KZN Branch; Mrs Ria Mathivha, Office of People with Disabilities in the Presidency, Ms Amy Bell-Mulaudzi, Librarian, American Consulate.

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Executive summary

Guiding principles for South African LIS

The Library and Information Services Transformation Charter is guided by certain fundamental principles enshrined in the South African Constitution. The most crucial are redress and equity. The unevenness in distribution and quality of LIS in South Africa reflects the apartheid past. The Transformation Charter presents a vision of transformed LIS. However, its purpose transcends the LIS sector as its premise is that, given the opportunity to overcome present challenges, it will contribute to the transformation of South African society. The overarching social goal of LIS is to build the human, intellectual and social capital crucial to the kind of knowledge society to which South Africa aspires. The redress of inequity in the LIS sector is not therefore just a question of fairness. Such a transformation would allow LIS to fulfill their social mission in the following ways:

- Knowledge societies are learning societies. They rely on the documenting, preserving, communicating and sharing of information. LIS collections and their information retrieval systems are crucial to the learning and research cultures that characterise knowledge societies. South Africa's rich but neglected reserves of indigenous knowledge are vital in this process of knowledge building, preserving and sharing.
- Access to information is a human right. The role of LIS in the free flow of information and exchange of ideas necessary for debate and research in a democracy has to be affirmed.
- Most South Africans are shut out from the benefits of the knowledge or information society. For example, only 10% of South Africans are users of the Internet, compared with over 70% of the citizens of the knowledge societies of Northern Europe. LIS information resources and ICT facilities serve to provide physical access to the information society to marginalised groups. Librarians' expertise in the world of information, together with their information literacy and literacy programmes, develop the information skills needed to exploit the technologies in people's everyday lives.
- The model of LIS presented in the Charter is developmental, in keeping with the socio-economic context and UNESCO's Millennium Development Goals. LIS play a role in government development programmes such as Asgisa and Jipsa. The legacy of apartheid is poverty and underdevelopment, shown by the fact that about 48% of South Africans live below the national poverty line. LIS resources, networks, information services and educational and literacy programmes can contribute to the eradication of poverty, the promotion of family wellbeing and health, the spread of education and the development of youth – to all development goals.

- South Africa's demographics and its social challenges explain the Charter's emphasis on the reading and information needs of children, school learners and youth. Fifty-five percent of South Africa's children live in households with a monthly income of less than R800.00. Disproportionately high levels of unemployment, high levels of HIV infections, increasing numbers of child-headed households, and the victimisation of children due to violent crime are just a few of the challenges facing South Africa's young people. They desperately need access to reliable information; but mere access is not enough. They also need to learn to use that information to rise above the challenges. The early childhood development programmes of public LIS will ensure that poor children arrive at school as ready for school as their middle class peers. Access to collections of attractive books and resources in their home languages at school will augment and continue their cognitive and emotional development. The information literacy education provided by school and academic LIS will prepare them for fulfilling lives both in our economy and in our democracy.
- Besides prioritising education and development information, the developmental model embraces other aspects of human development. In a culturally diverse and multilingual society, LIS have an important cultural and nation-building role through the nurturing, collecting and promoting of literature and writing in all South African languages and for all age groups.
- The provision of books and other media for leisure and personal exploration and fulfillment will remain a central part of the mission of LIS. The promotion of reading – for example through family literacy projects, adult education programmes, teenage reading clubs, and storytelling and writing activities – is vital. Knowledge and learning societies are reading societies.
- Although LIS are increasingly virtual and digital, their role as intellectual, cultural and social meeting places will continue. Whether real or virtual, they provide spaces for communication within communities and between communities. In a fragmented society such as South Africa, their unique contribution to social cohesion must be nurtured.

Charter development processes

The Charter emanates from the National Council of Library and Information Services (NCLIS) – the body that advises the Ministers of Education and Arts and Culture. Its financial support comes from the Department of Arts and Culture (DAC) and its operational support from the National Library of South Africa. The aim has been to be as inclusive as possible. The first draft emerged from public consultative workshops in every province in early 2008 in which a wide range of stakeholders participated. The annual conference of the Library and Information Association of South Africa (LIASA) in October 2008 provided an opportunity for the presentation of the first draft in several group sessions and for many interviews with key informants in all sub-sectors. Follow-up phone calls, visits and e-mails continued the process of gathering information until the second draft was presented at the National Summit in Pretoria in December 2008. Several submissions and suggestions were received during and after the Summit and were incorporated.

Challenges

Most of the challenges facing South African LIS originate in the comment that South African society undervalues and underfunds LIS. The educational, cultural and social contributions of LIS – both actual and potential - are generally underestimated.

The Charter's investigation uncovered the following urgent challenges:

- The uneven and unequal provision of resources within all LIS subsectors continues to reflect apartheid. Access is difficult and participation is minimal.
- The low profile of the sector is understandable given the shortages of LIS. Millions of rural South Africans live out of reach of LIS and 87% of schools do not have functional LIS.
- The uncertainty over overlapping and confusing government responsibilities and mandates has hampered the growth of LIS.
- All LIS sub-sectors suffer from the absence both of norms and standards and of empowering legislation. Perhaps the most urgent need lies within the school LIS sector.
- Insufficient information resources in indigenous languages.
- The low status of the LIS profession is evidenced by prevailing poor remuneration, low numbers of new entrants, the exodus of experienced staff and dwindling student numbers in university LIS schools. LIS schools are threatened with closure. Inappropriate appointments of unqualified staff in school and public LIS exacerbate low morale among professional staff and add to the prevailing doubts over professional status.

The description of current challenges suggests that LIS are probably viewed by most as irrelevant collections of books for the educated and middle class. The question confronting the LIS sector is: How can South Africans value something they have no access to and no use for?

Transformed LIS vision

The Charter presents a vision of a transformed LIS which will have the following indicators:

- LIS are within reach of all South Africans. Access is free.
- More than 50% of South Africans are regular visitors and members. LIS are seen as places for everyone, catering for the marginalised such as people with disability, rural citizens, the jobless and the incarcerated.
- The various sub-sectors collaborate to ensure a borderless LIS system which is free of barriers and achieves equity of provision for all citizens.
- LIS are guided by norms and standards. The norms and standards provide for the needs of people with disability.
- There is an integrated funding model which ensures sustainable growth of the sector.
- LIS staff are committed professionals and are respected as such by their parent institutions, government bodies and user communities. They are appropriately qualified and remunerated. They are engaged in continuous professional education and development. They have codes of ethics and are held accountable.

The Charter's vision for LIS is attainable. In spite of the challenges, its investigation found evidence of many innovative programmes and high levels of energy and commitment among LIS practitioners in all sub-sectors. The positive impact of the DAC's recent conditional grant on South African public LIS promises well for the future. It has brought welcome relief to the sector.

Way forward

The description of the challenges and the vision of transformed LIS map the path ahead and identify the barriers:

- Both the low profile and the underfunding of the sector call for more dynamic marketing. Once convinced of the benefits of LIS, rural citizens, educators, learners, and their representatives may begin to demand them.
- The demand will be for services that are relevant to people's needs. The LIS sector and other stakeholders will need to spend time analysing the meaning of a "developmental" model and how best to implement it.
- NCLIS will lead the formulating of a LIS transformation plan in consultation with LIASA, government, employing institutions, LIS users and other role players.
- Public LIS legislation is the first milestone on the path. It will spell out the LIS role in society, clarify government mandates, develop an integrated funding model and lead to norms and standards.

- The ending of the uncertainty over responsibility for school LIS norms and standards must be another early milestone. National guidelines on school LIS staffing and provisioning will encourage provincial education departments and school governing bodies to build their own policies.
- Research in innovative solutions to the shortages of LIS is needed. The potential of dual use models, for example school community LIS, must be investigated.
- Barriers to collaboration among sub-sectors must be identified and overcome.
- The vitalising and transforming of LIS are dependent on the commitment of LIS staff. The weak status and low morale of the profession are likely stumbling blocks. More school leavers and graduates must be attracted to the profession by means of bursary schemes and insistence on professional qualifications, professional service, and appropriate and competitive remuneration. LIASA and other professional groupings and employers must take up the challenge.
- LIASA should be registered as statutory body in order to regulate and give professional status to the LIS sector.

Historical and policy context

South Africa's successive colonial, segregation, and apartheid regimes produced a Library and Information Services sector that embodied racial stratifications and inequalities in its laws and policies. Public libraries, for example, served the informational and leisure reading habits of a privileged, predominantly white middle-class. The design of library buildings was based on the assumption that books would be borrowed for reading at home where there was space, comfort, and sufficient light. There are many other resource and service delivery disparities in this sad legacy.

Since 1994, however, new kinds of discrimination have emerged. Examples include increased fees to use library services, charges related to the use of the promotion of access to information act and the deterioration of library services to poor and uneducated citizens, particularly in rural areas and informal settlements. Inherited and new inequalities will grow unless they are urgently redressed. In brief; the LIS sector needs to be transformed!

Rationale

The National Council for the Library and Information Services (NCLIS), in collaboration with the Department of Arts and Culture (DAC) and the National Library of South Africa (NLSA), commissioned the Library Transformation Charter to align the LIS sector with the spirit and values enshrined in the Constitution of the Republic of South Africa and its Bill of Rights, and to address national imperatives such as:

1. Redress and equity
2. Social and economic development
3. Social cohesion
4. Social inclusion
5. Poverty eradication
6. Diversity and responsiveness
7. Nation building
8. Entrenching a culture of reading
9. Developing a national literature in South Africa's indigenous languages

NCLIS expects that the transformation of the LIS sector will be guided by the following values:

1. Joint responsibility in all spheres of government to provide and manage resources
2. Respect for cultural diversity in the overall functioning of the sector
3. Ensuring that all South Africans participate equally in the activities and development of the sector
4. Building an enabling legislative and policy environment in which all South Africans can derive the full benefit from the sector

Legislative framework

The Constitution and a body of legislation governs South Africa's LIS sector, and mandates the delivery of library and information services. This body of legislation is accompanied by other government documents and laws that contain explicit and implicit references to library and information services. Some of them are listed below, with indications of their specific bearing on the Library Transformation Charter.

1. The Constitution of the Republic of South Africa (Act No 108 of 1996). The charter will align the LIS sector with the national strategic imperatives that are inspired by the Constitution. The right of access to information, which is enshrined in the Constitution and in its Bill of Rights, links to the freedom of expression and freedom of access to information responsibilities of libraries.
2. An anomaly in Part A of Schedule 5 of the Constitution has resulted in confusion about the responsibility for delivering public library services, with unfortunate consequences. The Charter expects, however, that forthcoming community library legislation will correct this anomaly and establish certainty on the matter.
3. The White Paper on Arts, Culture and Heritage, 1996. The literature section refers to the absence of an entrenched reading culture and to the DAC's aim to promote, develop, and make accessible the rich and diverse traditions of all South African literatures in written and oral forms. The section on library and information services affirms the role of libraries in development, and in the promotion of a culture of reading and learning.
4. The National Library of South Africa Act, No 2 of 1998. The aims of collecting, recording, preserving, and giving access to the national documentary heritage and the world's information resources resonate with the Charter's aims. The amalgamation of the South African Library in Cape Town and the State Library in Pretoria to form the National Library of South Africa supports the achievement of these objects.

5. The South African Library for the Blind Act, No 91 of 1998. The focus of this Act is on blind and print-handicapped readers and on improving access to library and information services by South African people with disabilities. In the chapter on access.
6. The United Nations Convention on the Rights of Persons with Disabilities and Optional Protocol. South Africa ratified the Convention and its Optional Protocol, which became an International Law on 3 May 2008. South Africa's commitment to modify or amend existing laws, regulations, customs, and practices that discriminate against persons with disabilities will add force to the Charter's transformation agenda.
7. The Legal Deposit Act, No 54 of 1997, which requires publishers in the country to supply copies of each new publication to places of legal deposit, guarantees the preservation of the national documentary heritage, and its availability across the country. Suppliers of library and information resources are key LIS stakeholders and important participants in the preparation of the Charter.
8. The Copyright Act, No 98 of 1978. This Act still requires amendment regarding copying and access to information. Copyright laws must be fair, and must balance the interests of commercial and non-commercial publishers with the public interest. Special provisions in the Act for libraries, education, literacy training, inter-library lending, preservation, and access by persons with sensory-disabilities will assist transformation of the LIS sector.
9. The National Council for Library and Information Services Act, No 6 of 2001. The functions of the Council include the provision of information and advice to the Ministers of Arts and Culture, and of Education on the deficiencies of library and information resources in African languages, and on the promotion of basic and functional literacy, information literacy, and a culture of reading
10. The Education Laws Amendment Act, No 31 of 2007 (that amends the South African Schools Act of 1996) lists the availability of a library as a minimum uniform norm and standard for school infrastructure.

Selected list of other laws and government documents that bear on the LIS sector

The legislation listed above has a strong and direct impact on the LIS Sector, but there are many other laws and policy documents that are implicated in the delivery of library and information services. They include:

The White Paper on Education and Training, 1995

The National Archives and Records Service Act, No 43 of 1996

National Educational Policy Act, No 27 of 1996

The White Paper on Education, 1997

The White Paper on Higher Education, 1997

The Higher Education Act, 1997

The White Paper on Transforming Public Service Delivery, 1997

The White Paper on an Integrated National Disability Strategy, 1997

The Local Government: Municipal Structures Act, No 177 of 1998

The National Heritage Council Act, No 11 of 1999

Public Finance Management Act, No 1 of 1999

The Local Government: Municipal Systems Act, No 32 of 2000

Provincial Library and Information Services Act, No 7 of 2001

The Promotion of Access to Information Act, No 2 of 2002

Objectives of the LIS sector

Whereas the legislative framework mandates service delivery for the LIS sector, it is LIS professionals that drive this process. In their several information roles and in different types of libraries, LIS professionals aim to:

1. Support and stimulate the socio-economic, educational, cultural, recreational, scientific research, technological and information development of all communities in the country
2. Provide optimal access to relevant information to every person in an economic and cost-effective manner
3. Promote basic and functional literacy, information literacy, and a culture of reading
4. Strengthen democracy by encouraging critical and independent thinking and intellectual freedom
5. Harness new information and communication technologies (ICT) to achieve improved integration, equity, cost-effectiveness and quality in library and information services
6. Make available the national documentary heritage and facilitate access to the world's information resources by all, including people with disabilities
7. Provide for the preservation of the national documentary heritage, and provide conservation services
8. Put a premium on Indigenous Knowledge, and mainstream this knowledge by collecting and disseminating it in book, audio, and video formats.

Policy context of the Library Transformation Charter

Although the process for developing the Library Transformation Charter continues policy initiatives in the LIS sector that commenced in the early 1990s, it differs from those earlier policy initiatives in many respects. The differences derive from and build on the outcomes of the earlier policy initiatives. The special characteristics of the Charter process include the following:

1. The Charter is driven by NCLIS, which is a statutory body responsible for coordinating transformation and redress in the LIS sector. Following the announcement of a Treasury Grant in 2006, NCLIS-led activities that culminated in this charter process include a LIS stakeholder consultative workshop, an early draft by a small task team to guide the implementation of conditional grants, and the KPMG project.
2. The DAC backs the NCLIS commission to draft the Charter, and direct communication with DAC and its Minister provides the process with strong political and financial support.
3. Public visibility of the Charter and public participation in the process, through consultation in all nine provinces with all LIS stakeholders, is unprecedented in policy initiatives in the LIS sector.
4. The kinds of questions asked in the Charter consultations are qualitatively different from those asked before.

Vision of the Charter

The Library Transformation Charter, which is guided by the spirit and values of the Constitution and focused on national imperatives, presents a vision of transformed LIS which will have the following attributes:

1. LIS are within reach of all South Africans.
2. More than 50% of South Africans are regular visitors and members. LIS are seen as places for everyone, not only a literate minority or school learners and students. Public LIS are free.
3. LIS of all kinds are forces for social cohesion and justice. Their collections, ICT, spaces, meeting rooms and educational programmes provide physical and intellectual access to the information society.
4. LIS cater specifically for the marginalised – for example, rural people, old people, poor people, under-educated people, people with disabilities, jobless people, and incarcerated people. In doing so, they contribute to social and economic development and poverty eradication.
5. LIS of all kinds play a role in the learning society. They develop lifelong learners, from public library services for parents and children, to those for PhD researchers and academic LIS. Research is a national priority.
6. Their staff are committed competent professionals and are respected as such by their parent institutions, government bodies and user communities. They are appropriately qualified and remunerated. They are engaged in continuous professional education and development. Each staff member has a code of ethics and is held accountable.
7. LIS prioritise the reading and information needs of children and youth, who form a large part of our population and who are confronted with significant social, economic, health and educational challenges.
8. LIS provide all South African school learners with access to collections of reading and learning resources and to information literacy programmes so that they leave school ready for work, tertiary education, and life in a democracy.
9. In keeping with South African democratic values, LIS are places for free thought and debate. The free access to information enshrined in the Constitution is a fundamental value.
10. The various sub-sectors collaborate to ensure a borderless LIS system which is free of barriers and offers equity of provision for all citizens.

11. LIS collaborate with allied sectors such as archives, publishers, the ICT sector, booksellers and educationists.
12. LIS are valued memory institutions. They serve as repositories, preservers and disseminators of indigenous knowledge and culture. Digitisation of significant collections of manuscripts and institutional research repositories provide open access.
13. Through their collection development policies and their reading programmes, LIS nurture the development of a national literature inclusive of all South African languages and cultures.

The development of norms and standards and policies will identify appropriate indicators to measure the progress of LIS transformation.

Methodology: reliability and limitations

In the preparation and writing of this charter, the Technical Team observed the protocols and patterns of investigation of other sector-specific charters produced by the government. However the special character and requirements of the LIS sector guided the adoption of appropriate methods of data collection.

The mechanisms for assuring quality, and for achieving validity and reliability do nonetheless comply with the standard criteria established in social science research. The NCLIS commissioned the charter in collaboration with the DAC and the NLSA gave the project a high public profile and supplied the political and financial support needed to conduct such an extensive project successfully.

The Technical Team, consisting of a chairperson and six members, was assembled on the basis of expertise in the LIS sector, and experience of the government's charter initiative. There was a special effort to ensure that the team possessed all the competencies required to produce a successful outcome. The Technical Team was assisted by a project coordinator who was responsible for the smooth running of the project.

Members of the Technical Team were paired in their research and writing assignments, and they communicated with each other and other team members electronically and at discussion meetings. These meetings were used also to review progress and strategies in the development of the charter. A Reference Group of experienced LIS practitioners met regularly with the Technical Team to monitor progress and to discuss draft reports. Minutes were taken at these meetings and distributed to the Technical Team and Reference Group members.

A Participatory policy analysis approach guided the collection of qualitative and quantitative data. In this approach, public consultations feature strongly as a widely acknowledged way of probing the nuances and inner dynamics of human and social processes. Public consultation meetings were arranged in the nine provinces of the country with a view to bringing together all the LIS stakeholders at a centrally-located venue.

Although attendance varied, the discussions generated valuable data on the basis of a standard list of questions on pertinent LIS matters (see Appendices). Participants were allowed to respond to these questions in their own languages, and immediate translation facilitated in-depth discussions. The Technical Team provided translators to deal with regional variations in language use. This arrangement encouraged wider participation and enriched the quality of data elicited at the Public consultation meetings.

The meetings were video-taped and recorded for subsequent content analysis. These materials constitute a rich body of primary evidence, and may be useful for future consultation by LIS and other scholars. Technical Team members also made and shared notes directly after each meeting. This allowed immediate discussion of the issues raised at the public meetings and the opportunity to address difficulties that could thus be avoided at subsequent meetings.

There was a concerted effort to collect and analyse materials with a direct bearing on the LIS charter themes. These were sourced from the internet, government offices, individuals, and libraries. They included recent relevant reports such as the KPMG report on public libraries, research studies, surveys, white papers, and other government documents. Trend analysis of the data provided a reasonable degree of validity and consistency, especially given the nature of the project and its strict time-frame.

A first draft of the Charter was submitted to the Minister of Arts and Culture, and to NCLIS, and was circulated publicly for comment. The LIASA 2008 Annual Conference provided a unique opportunity to test the progress of the Charter with some of the key LIS stakeholders. Focus group interviews and in-depth discussions with reference individuals who attended the conference produced valuable additions, and identified weaknesses and gaps in the first draft. There were follow-up sessions with individuals after the conference and technical team members received written submissions that strengthened and improved sections of the charter.

In line with the idea of deliberative democracy, a second draft was publicly circulated for discussion at a National Summit with a view to further improvement. The comments from participants at the National Summit were incorporated into a third draft, which provided another opportunity for publicly circulating and improving the charter before official adoption, final editing, and production.

Limitations

The Charter is limited by the factors that affect all national consultative projects, and only some are identified here. The representivity of the data in respect of province, LIS stakeholders, urban and rural areas, literate and illiterate persons, and so forth, was uneven and can be questioned. It was particularly difficult to reach such user groups as learners and students, although where they attended provincial consultations, their concerns were articulated clearly and emphatically. There was a concerted effort to improve representivity through follow-up meetings and consultations throughout the duration of the project.

Another limitation has been the terms of reference of the project. The NCLIS, in collaboration with DAC and the NLSA, commissioned the Library Transformation Charter in order to align the LIS sector with the spirit and values enshrined in the Constitution of the Republic of South Africa and its Bill of rights, and to address national imperatives. This presented such challenges as the different interpretations of national imperatives by LIS stakeholders, the timeframe for completion of the project, and the format of the final product to be delivered. In order to overcome these limitations, an extension was granted to the technical team to consolidate the vast amount of data, and to deliver both a research-based product and a briefer version that summarizes the key issues contained in the charter itself.

The charter's conceptual separation of libraries from archives and museums, in spite of managerial connections in government departments, highlights another limitation of the charter. More importantly, the South African public's need for information, for example on family history, local history, government information, identity, and so forth, implicates libraries, archives, and museums collectively as memory institutions. In practice, the libraries that are located in archives still face difficulties in their efforts to serve the general public, thereby preventing increased collaboration.

Another limitation is that the Charter is primarily an aspirational and inspirational document and offers only some strategic guidance on implementation. For this reason it does not address all of the issues raised by LIS stakeholders concerning the level of detail that they may expect it to, and may therefore not meet their expectations. Also, there are some operational changes that can be effected quickly in sub sectors, and other changes that will require more time. The NCLIS should consider conducting workshops after the release of the charter to indicate which LIS matters will be given closer attention in a different format. A constant refrain in many discussions, for example, was the need to produce minimum uniform norms and standards for the LIS sector.

Finally, it may have been unreasonable during the collection of data to expect practising librarians in an uncomplicated way to connect the traditional aims and objectives of libraries with national imperatives such as poverty eradication, social cohesion, and economic development. One way of dealing with this after the Charter is released may be to ensure that a library's own transformation plan of action be clearly linked to a specific national imperative.

State of the sector and cross-cutting challenges

Introduction

The consultation process revealed that there are many differences between the various sub-sectors of the LIS sector. It was also clear that there are certain cross-cutting challenges that are faced by the sector as a whole and that have to be addressed when developing public policies for the library sector.

1. Governance of the sector

There is an overlapping of library mandates across governmental sectors. This needs to be clarified.

- a) The LIS sector in the public service at national level is located under Archives, giving rise to conflicting mandates.
- b) The mandates of the various tiers of government, National, Provincial and Local overlap.
- c) The mandates of the DAC and DoE are perceived to overlap with regard to LIS.
- d) Lack of policy guidelines to responsible organs of government to ensure that the requisite resources are provided and are not lacking.

2. Policies and strategy

The library sector is fragmented across different levels and departments of government as well as a variety of non-governmental organizations. This fragmentation indicates the need for policy review.

- a) There is no policy on the clear allocation of roles, responsibilities and mandates, especially at local government level. The present structure of the sector is not conducive to effective service delivery.
- b) There exists a lack of policies and strategy to integrate libraries into the communities.
- c) The lack of coherent policies and strategy results in many cases in the perpetuation of the inequalities of the past or in unforeseen consequences of attempts at change.

3. Norms and Standards

Norms and standards for service delivery in the different library sectors are lacking. Norms and standards are needed for libraries in the different sectors with regard to services, management, staffing, resources, infrastructure, ICT and access.

- a) In the public sector, norms and standards are lacking for categories of employment and salaries.
- b) There is unequal grading of positions and ranks across provinces, departments and local government.
- c) Salaries are also unequal across the various sectors of the public service.
- d) Salaries and post levels in other sectors are also unequal and appear to be arbitrary.
- e) Salaries do not compare with those of other professionals with equivalent qualifications and responsibilities.
- f) Career pathing for librarians is widely lacking. Unqualified staff are often employed at low salaries and expected to perform professional tasks.

4. Funding of libraries

Libraries have been seriously under-funded, both as a government sector and within organizations.

- There is no funding framework/model with a clear emphasis on the funding of library and information sector and of libraries within organisations.

5. The status of the library profession

The low status of the library profession and doubts among its practitioners about their professional identity are hampering the social role of libraries. The consequences of this have been the exodus from the profession and its failure to attract new entrants.

6. Education and training

Too few library professionals are being developed to meet present and future needs.

- a) Some institutions are closing their LIS schools and few are still training school librarians.
- b) Present practitioners are not receiving continuing professional development to equip them with new skills.
- c) Attracting young people into the library profession is a further challenge.
- d) The workforce in all sub-sectors is aging, with serious implications for the future.
- e) LIS curricula do not always meet the needs of the contemporary profession and its constituencies.

7. Development imperatives

The role of the library and its staff as an agent of development and change in the country has not been sufficiently recognised or achieved.

- a) The library sector is not in a financial position to address as imperatives the redress and equity that should inform developments and service delivery in all types of LIS.
- b) Weak LIS role in Government development programmes such as Asgisa and Jipsa.
- c) In rural areas, traditional leaders are not being sufficiently involved in the kind of LIS decision-making and promotion which would strongly enhance community involvement and LIS use.
- d) Many people lack the reading and information skills for them to be able to benefit optimally from library services, including at tertiary level and in the workplace.
- e) Many are also unaware of the benefits that libraries offer, e.g. information on rights, services, health and work.
- f) Poverty has a significantly negative impact on library use. The spatial distribution of libraries mostly places them out of reach of the poor.
- g) Libraries in all sectors lack visibility.
- h) LIS do not render all those information and services which could to help eradicate poverty and contribute to social cohesion.
- i) LIS can do more to strengthen democracy by encouraging critical and independent thinking.

8. The culture of reading

There are very low levels of reading, writing and information literacy in the country.

- a) The role of libraries in all sectors in addressing this is not sufficiently acknowledged.
- b) The lack of functional literacy is a major impediment in the work force and affects productivity.
- c) The digital divide impairs the functionality and cognitive development of the people.

9. Indigenous knowledge systems

Libraries have largely neglected the mainstreaming of indigenous knowledge and the collecting and disseminating of it in book, audio and video formats. Indigenous knowledge is not valued in the market place.

10. Access to library services

Many people do not have access to library services.

- a) There is unequal spatial access to library services with regard to urban/rural, suburb/township/informal settlements as well as the different provinces and local governments. This applies not only to community and school libraries but also certain university libraries.
- b) The shortage, and in many cases lack, of suitable resources in the languages of potential library users also limits their access to information and the services of the library.
- c) The unavailability of staff to serve people in their own languages and other modes of communication further limits access.
- d) Many libraries are in old buildings and in buildings which have not been designed as libraries. The creation of physical infrastructure to provide access to the facilities is a challenge.
- e) Many libraries do not provide formats that are accessible to visually impaired and learning disabled users.

11. Information and Communications Technology

Many LIS lack the necessary technology and the capacity to use the technology, both to facilitate the work of the library and to provide access to electronic information for users. ICT is transforming the role of the library and of the librarian.

12. Procurement of library and information resources

Cumbersome and ineffective procedures hamper the procurement and acquisition of library and information resources and this leads to waste. There is a need for LIS to work with publishers and booksellers connected with recognised professional organizations as LIS sector stakeholders that are fully committed to assisting libraries to deliver their mandate to their communities.

A) Public/community libraries

Overview

The IFLA/UNESCO Public Library Manifesto is the most important document setting out the principles and functions of the public library. It notes that the essential feature of the public library, funded by public money, is that it be free to all members of the community regardless of age, race, religion, gender, nationality or social status. Its unique value to the public is that “it is the gateway to knowledge, provides the condition for lifelong learning, independent decision-making and the development of the individual and social groups”.

In South Africa public library services are the special competence of provinces, in terms of Part A of Schedule 5 of the South African Constitution. Prior to these constitutional provisions, this function was shared between provinces and local authorities with local authorities providing and maintaining buildings and staff, and provinces providing the professional and technical services. In the current dispensation this arrangement largely continues, although the legislation does not specifically provide for this. Currently services are offered by provincial library services, and metropolitan and local municipalities. Because of the rather anomalous constitutional provision, services and infrastructure have declined over the last ten years instead of keeping pace with the increasing demands of a modern developmental democracy. Today there are 1800 public libraries: 24 libraries per million people – 25000 people per library. Their location has been influenced by former apartheid spatial planning with the result that many areas, such as former townships, informal settlements and rural areas are under-served. There are a number of municipalities where there are no libraries at all, a situation affecting more than 2 million people in Gauteng alone. Some libraries have changed their designation to “community library” in order to emphasise their connection to the community and to indicate the availability of a broader range of services than those associated with the traditional public library. This signifies a break with the past, when the public library was identified as an agency for the elite, and an institution that has been widely criticised as being irrelevant in Africa.¹

1. In the rest of this section the term ‘public library’ is used as a generic term as it is the term that is widely understood to denote a library for the public funded by public money. This use is not intended to lose the notion of the public library’s orientation to and focus on the community it serves as being the principal factor that drives innovation, policy and practice.

Because of poor resourcing in the last ten years, South African public libraries have been constrained from going beyond traditional services which revolve around the lending of library material, and children's services. The developmental role of the public library is not as well advanced as the traditional role, with a notable exception. The increasing provision of materials, facilities and services to school learners in response to the demands of outcomes-based education has been an important contribution to educational goals. These learners use the public library for an estimated 50% of the opening hours of the library, a statistic which highlights the serious lack of school libraries. Higher education students in great numbers also make use of public libraries. Innovative practices which indicate the public library's developmental role can be seen at a number of sites, providing evidence of important outreach interventions and countering social exclusion. A small number of examples serve as illustrations and models of community outreach, showing that communities with libraries are stronger in a number of ways than those without them:

1. Vegetable gardens in the grounds of the library and the hosting of permaculture workshops
2. Adult basic education classes including skills development for employment and financial literacy
3. Promotion of reading and writing in the vernacular, e.g. the establishment of isiXhosa reading clubs to promote the value and status of reading in isiXhosa areas
4. Small business corners supplied with computers and electronic resources
5. Digital doorways for young people to acquire computer skills
6. Paired reading: pairing learners from partner schools and hosting reading activities in different mother tongues
7. School project services and homework clubs offering young people a protected and social place for learning
8. The provision of HIV and AIDS information in appropriate format for young people
9. Services to closed institutions such as hospitals, prisons, places of safety, and also nursery schools

The Department of Arts and Culture has made available Conditional Grants to improve service in public/community libraries to enable the South African society to gain access to knowledge in order to improve their socio-economic situation. The intention is to have transformed urban and rural library infrastructure and services targeting previously disadvantaged communities. The grants have so far been used, *inter alia*, to:

1. build more libraries and to upgrade library buildings
2. buy, equip and deliver mobile libraries and container libraries for communities
3. appoint more staff, and extend opening hours
4. expand and improve ICT connectivity
5. develop and implement a new provincial ICT system
6. upgrade security and improve library assets
7. buy more library material
8. stock more books in indigenous languages

The grants have already made a visible difference in delivery, and use and participation by communities in many areas. Reports indicate enthusiastic take-up of new services which appeal also to non-traditional users.

Objectives

The public library as the community information and cultural hub needs to have focused activities with a clearly targeted audience and clear and measurable goals to assist in the planning and setting up of mechanisms to achieve the broad imperatives of socio-economic development, promotion of culture and nation-building.

1. All public libraries will be community centres responsive to local needs and able to meet information needs through quality services informed by input from the local communities, input which is actively and systematically sought.
2. The librarians will be inspired by the vision of the new model of responsive service and motivated by the opportunities to fulfill their dynamic role as change agents.
3. There will be a national strategic plan directing growth, expansion and consolidation of public library services, taking into account the diversity of needs of different communities, and targeting previously disadvantaged areas and groups.
4. They will plan their services based on the foundational principles of freedom of information and access for all.
5. The public libraries will fulfill their important contemporary function of making available public spaces, where activities of various types are offered and taken up, in pursuit of their unique educational, societal and cultural roles.
6. Community building and the countering of social exclusion require proactive approaches that result in the design of suitable mechanisms to realise these goals, of which the following are examples:
 - a) Promotion of reading and writing
 - b) Formal and informal education and learning:
 - c) Community and other useful information provision, e.g. consumer information, health, employment opportunities
 - d) Democracy and citizenship
 - e) Fostering creativity and cultural expression
 - f) Support of businesses
 - g) Social cohesion and the fostering of appreciation of cultural diversity
 - h) Access to and the mediation of ICTs
 - i) Information literacy to allow citizens to participate in the knowledge society

Challenges

The community needs to be at the centre of the library for the library to fulfil its unique functions. In addition to the technical LIS skills required for effective service, and in order to reduce the social distance between the library and its community there should be:

1. a focus on community development awareness
2. the skills to engage with the community
3. an ability to understand and engage in the political process necessary to advocate for the library
4. an ability to analyse needs, and formulate a strategic focus.

In the process of transforming into a community hub, the following specific challenges need also to be addressed:

Governance

1. Governance is at the heart of the variability in funding and resource provision and consequent differences in quality of service provision
2. There are difficulties arising from Part A of Schedule 5 of the South African Constitution and the absence of provincial legislation that stipulates that the municipalities must render a library service. In international practice public libraries are legislated as a municipal function.

Access

1. Physical distance is a deterrent to use of the library, particularly given the spatial distribution of public libraries, thus privileging white communities. This is a legacy of the past.
2. Opening hours limited to the typical working day also militate against social inclusion. The extension of opening hours affects operating finance because of cost implications. The average opening hours of libraries in South Africa are 40 hours per week, compared with Cuba, with its admirable literacy rates, where the average opening hours are 90 hours per week.
3. Security: Public libraries have also been exposed to threats to security as have so many other entities. This has limited opening hours in many instances to office hours.
4. Membership charges also act as a barrier and highlight the unevenness of provision. In some areas they are applied and in others not.

Information and communication technology

Participation in the knowledge society requires that all citizens be given access to the Internet and electronic resources.

1. It is the duty of the public library to provide that access. An innovative pilot in Kwazulu Natal has demonstrated the power of ICTs combined with community library facilities to provide a one-stop information hub supplying educational, health and business information to remote rural areas; The project plans to use the digital technology to preserve and promote local indigenous knowledge
2. Currently 74% of public libraries are not connected and 65% rely on manual systems for routine management and administration.
3. Extended access must be accompanied by mediation, facilitation, training and support for the new users who will be attracted to a library offering an ICT hub.

Staffing and staff capacity

1. Inappropriately skilled people are being appointed to professional posts in some areas.
2. There is a national vacancy rate of 30% in professional positions, a situation which has a deleterious effect on service delivery.
3. Because of the high volume of use by school learners and university students, the ability of libraries to perform their core functions has been compromised.
4. Staff will need to have requisite skills to offer a service in keeping with the demands and challenges of the unfolding knowledge society.

Materials provision

Catalogues of literature and readers in the African languages ² have been printed. Although there are still insufficient titles in all the vernacular languages, it is encouraging to note the increase in titles that have become available. This has enabled the National Library of South Africa to meet its objective of providing public libraries with comprehensive catalogues for easy ordering of materials.

² Including Afrikaans

Recommendations

In order to address the challenges identified, the following actions are recommended:

Partnerships

1. The library should be fully integrated into each municipality's integrated development plan, and the municipality must again become the partner in library services provision. This will require of the librarian the ability to understand how to communicate with local authority managers and politicians, to advocate for the library and so ensure that it plays its role in the economic and social life of the community.
2. Because of Constitutional provisions, provincial library services should take steps to ensure that cooperative agreements are in place with local authorities so that service levels are guaranteed, and that there is clear definition of roles.
3. All public libraries must become members of the South African Library for the Blind so that they can readily render services to the visually impaired.
4. Partnerships with other community agencies will extend the reach of public libraries. For example, linkages should be established with Multipurpose Community Centres which have been established by government to offer integrated electronic information services to communities particularly in rural areas. Libraries, working with partners in the public health, sector may play a useful role in combating HIV and AIDS, malaria, TB and other diseases.
5. There should be closer cooperation with schools in order to promote more effective services to learners.
6. Libraries should enlist the support of the community by establishing and/or strengthening the Friends of the Library Committee. This is an effective means of extending the capacity of the library and also of providing a valuable bridge to the community.

Removal of barriers

1. Where new libraries cannot be built, consideration should be given to the adoption of mobile services as an interim remedy particularly in rural areas with sparse populations.
2. Another interim portable and transportable solution for dispersed communities far from urban or peri-urban hubs is offered through the use of container libraries, which offer a convenient and affordable service point in a previously unserved area.
3. Requisite funding for the extension of opening hours should be provided where circumstances demand it.

4. Where there are none, services should be provided to those whose movement is restricted, either through infirmity, ill health or incarceration. People in these circumstances need access to materials for rehabilitation, for therapy and also in order to participate in education. Outreach services will overcome difficulties that some communities experience in making visits to the library. This will have the added benefit of building community ties and integrating the library in the community.
5. Marketing of new collections and services must be undertaken in an effort to attract individuals and groups who have been under the impression that LIS can offer them nothing of value.
6. The extension of services must be accompanied by programmes that will facilitate and promote use, thus optimising return on investment, e.g. information literacy programmes, particularly important for people who have not previously been exposed to information and library resources.

Provision of computers and ICTs

1. All public libraries will have sufficient computer capacity for the management and delivery of services.
2. There will be sufficient computers with Internet connections in each service point, both for the use by the public and also for use by staff.
3. Public libraries should be connected to their municipal networks, and there should be country-wide networks that they can participate in.
4. There should be an interface between public library and school library networks so that resources can be shared.

Children's and youth work

1. Considering the demographic reality of the country and the desirability of establishing children's literacy at an early stage, special attention should be given to work with children from early childhood. Children and adolescents must develop a positive experience of the library mediated through committed and enthusiastic librarians. For example, the ways in which a public library in KwaZuluNatal used its conditional grant has shown that investment in targeted resources and services for children has increased membership and use vastly, with story-telling and the reference section for school projects being particularly popular.
2. Children's librarians require specialised training in addition to the general professional preparation.

3. Educational toys should be provided as a standard service.
4. Studies have shown that voluntary reading promotes and consolidates literacy skills so important for the development of the child, and also for successful learning.
5. Special efforts should be made to attract the youth to the library, by making available media and services designed to meet their tastes, lifestyle and needs, and offering information to meet their particular problems, e.g. on the prevention of HIV and AIDS and on career information. An HIV and AIDS educator in Mumbai has reported success in achieving behavioural change through using unconventional education methods such as drama, music and dance, an approach she has recommended to public libraries (Forsyth, 2005). The library can provide an environment for learning, development and a positive socialising support mechanism for our youth. The example of the Singapore's National Library Board's youth branch successfully attracting young people to use its targeted services for the young in an upmarket shopping mall is instructive, providing opportunities for experimenting with digital media such as the design of podcasts in a social learning space.

Training of staff

1. Pre-service education and training must incorporate these aspects of the changing role of the public library into the curriculum and continuing education must be made available to all staff on a regular basis in order for them to keep up with new technology and with changes in the environment.
2. Staff vacancies need to be filled with suitably qualified and competent staff as shortages have a deleterious effect on service, and erode the confidence of the community.
3. The hiring of professionally trained staff has the concomitant obligation that their professional judgement should be respected, and that bureaucratic obstacles to the effective performance of their tasks should be eliminated.
4. In order to counter the shortage of qualified librarians, all tiers of government should create a fund to finance bursaries for suitable candidates to study for a professional qualification. Depending on the shortfall, each authority will ring-fence an amount over a period of five years to provide bursaries for the study of library and information science, preferably for the postgraduate diploma which is the shortest route to dealing with the deficit.
5. Each library authority will develop a continuing education plan in order to facilitate the systematic updating of skills of staff.

Monitoring and evaluation of public/community library services

1. In order to ensure that the objectives of the service are met, which will vary according to context and community need, it is essential that activities and use are monitored and evaluated on a regular basis, and regular reports compiled and delivered to the appropriate authorities. Efforts must be made to demonstrate impact of services on their clients and the environment for funding and other authorities.
2. Performance indicators need to be developed. Statistics being currently collected can be used for this purpose. Norms and standards will be developed against which reporting can be done.

B) Special libraries

Overview

Differentiation characterises South Africa's Special Libraries, which are found in industry, government, and under private ownership, and may also be attached to private companies, research institutions, legal firms, mining companies, museums, hospitals, correctional facilities, and government departments such as the Department of Education and the Department of Correctional Services. Their differentiated character can be seen in some examples that include special and rare book collections and libraries with a special focus and clientele such as the Presidential Library in the Office of the President of South Africa, and the Constitutional Court of South Africa library.

There is greater unity among special librarians who possess advanced disciplinary knowledge and workplace skills.

Special libraries are often small and managed by one librarian, but others may be larger and more organisationally complex. The professional work of special librarians can include the traditional library and information services and the delivery of information and knowledge management services in private organisations. It is because of this diversity and their miscellaneous character that there is no single association that represents all special libraries.

Examples of such associations are the LIASA Special Libraries Interest Group (LiSLIG), the Special Libraries and Information Services (SLIS), the Organisation of South African Law Libraries (OSALL) and the Southern African Online User Group (SAOUG), which are separate bodies that deal with the needs and interests of most special libraries and special librarians in South Africa. Although it is clear that different special library associations and consortia are necessary for operational reasons, there is also the need for special libraries to be connected in some way with the National Association, LIASA.

Objectives

All special libraries advance the goals of their parent organisations, and focus on the specific information needs of their users. Special library associations and consortia encourage better library administration, information handling, techniques, and practices, and foster good relationships with content suppliers.

Challenges

The sector-specific challenges of special libraries and special librarians overlap with those of other LIS professionals but differ in the following ways:

1. Organisational complexity can result in special librarians having to report to different line managers. This leads to isolation of special librarians from each other and the needless duplication of tasks.
2. In cases where special librarians attempt to expand access to their resources by the general public their efforts are limited by geographical and financial factors.
3. Differentiation in the subject focus of special libraries often requires membership of professional associations outside of the LIS sector, and makes professional development more time-consuming and expensive.
4. The special librarians' high levels of knowledge of the sources and literature of disciplines, topics of interest, and the tools for exploiting and adding value to their content are often not widely known or appreciated in the organisations where they work.
5. There are often wide discrepancies in post rankings and remuneration for special librarians. Librarian posts are often ranked with those of clerks and staff without tertiary qualifications. In addition the posts are filled by candidates without library qualifications.
6. Lack of a professional LIS qualification and knowledge or a suitable qualification in the focus discipline or area of specialisation of the organisation reduces the effectiveness of the special librarian.

Recommendations

1. Managerial structures should consolidate all special library functions in an organisation into as few units as possible to improve efficient service delivery, and a more collegial working environment.
2. The senior management of parent organisations should be informed of the public value of the information resources of their special libraries, and should empower special librarians to expand public access where this is possible.
3. LIASA should workshop strategies with their existing special library members to expand membership. It should also become more flexible in its approach to attracting special librarians and consider amending the fee structure for special librarians who are required to belong to associations related to their organisational responsibilities.
4. There should be better coordination between the Special Library Organisations, LIASA, and LIS teaching departments so that expensive once-off workshops and seminars can spread skills development opportunities as widely and cost-effectively as possible.
5. There should be training opportunities for special librarians to remain abreast of the latest technologies in order to allow confident collaboration and communication with their international colleagues.
6. Special librarians appointed at management levels should have qualifications both in LIS and in the discipline or specialisation of the organisation served by the library, although the disparate market values of the two qualifications may lead to problems of retaining them.
7. Special librarians should learn to demonstrate the value of their libraries and of their own competencies using strategies that quantify their economic impact on the organisation in clear and simple terms.
8. Special librarians should address the issues of posts and market-related salaries and other work-related challenges by preparing minimum uniform norms and standards for this sub-sector.

C) University libraries

Overview

Each of the twenty-three universities has a university library or academic information service whose purpose is to support teaching, learning and research in their institution. Their services are aligned with the mission and goals of the institution, but all of them experience in varying degrees an environment that imposes particular challenges, which have led to discernible trends. These are: transformation of higher education, redress imperatives, increasing uptake of and demand for ICTs in teaching and learning, globalisation, the drive towards quality assurance, changing pedagogic practices and concern about the employability of their graduates.

Objectives

All libraries in the higher education sector will strive to offer excellent services to promote their organisation's mission and in keeping with national goals with respect to research, innovation, and human resource and economic development. They will recognise their role in an articulated system that will cooperatively meet the needs of the nation.

Challenges

Given the particular contribution which is expected from the university library in contemporary society to serve as a vehicle to facilitate the creation of new knowledge, it is envisaged that this sector will face the following challenges:

1. Redress of inequities in provision and resources between institutions impacting on the quality of the educational experience of the student. Projects that addressed historically disadvantaged university libraries served more to highlight the scale and depth of these inequalities than to remedy them because the benefits of books, ICT equipment and training could not be sustained in a resource-poor environment. Institutional mergers did little to equalise resources among university libraries. While physical structure, facilities to accommodate ICT equipment and services, and budgets remain inadequate, the inequalities will remain in place.
2. Balancing of the demands of institutional autonomy and participation in the implementation of sector-wide transformation initiatives. The holdings of university libraries are a national asset and should ideally be made available to all. Institutional autonomy need not be compromised by a commitment to national imperatives.
3. Optimal exploitation of digital technology

4. Demand for evidence-based value to the institution
5. Contribution to employability of graduates
6. Ensuring that staff have the capacity to meet demands of excellent service
7. Increasing access to the nation's information resources

Recommendations

In order to meet the challenges it is recommended that the sector:

1. Target inherited inequalities, and devise innovative funding strategies to redress them, as well as challenging the Department of Education to seek ways in which international organisations can assist.
2. Harness the potential of digital technology for the more efficient sharing of knowledge and the stimulation of innovation, through digital data curation and management, for example, in the creation of institutional digital repositories of the intellectual products of their institutions.
3. Commit to an ongoing process of self review in keeping with each institution's needs to ensure a system of reliable monitoring and evaluation and developing a method of demonstrating value and providing evidence of impact
4. Create an institutional information literacy policy leading to an action plan which recognises their responsibility for ensuring that all graduates enter the workplace with the requisite information literacy skills. This is urgent as the first baseline study of employers' expectations of graduates conducted by HESA in 2007 reported that employers found that graduates do not have the ability to find and use information.
5. Adopt a human resource development plan, thus ensuring that staff receive the requisite training at all levels for the delivery of an excellent service. The modern library requires a reorientation to the idea of the library as a learning space, and the librarian as teacher/mediator. This has been accelerated by the increase in availability for purchase of quality electronic resources, which is changing collection management practices and highlighting the need for client support.
6. Act as a partner in the provision of information to the nation's citizens, finding ways of meeting information needs of citizens which cannot be met through the stock of the community and school library sector. Build on the collaborative frameworks in place in order to optimise use of resources for the development of the nation.
7. Recognise and treat the university library as part of the core business of the university (academic).

D) National libraries

i) National Library of South Africa

Overview

The National Library of South Africa is a custodian and provider of the nation's key knowledge resources. It is mandated by the National Library of South Africa Act to collect and preserve published documents and make them accessible. It

ensures that knowledge is not lost to posterity and that information is available to all for research. The National Library has two campuses one campus is in Pretoria and the other one is in Cape Town. The National Library's Pretoria Campus has recently moved into a state of the art facility, generously funded by the Department of Arts and Culture. One of the first initiatives in this new building was the migration to Suse Linux, in line with the government policy of implementing Open Source software. The National Library is a partner in life to all South African citizens.

Objectives

The objectives of the National Library are to contribute to socio-economic, cultural, educational, scientific and innovative development by collecting, recording, preserving and making available the national documentary heritage and promoting an awareness and appreciation thereof, by fostering information literacy, and by facilitating access to the world's information resources.

The National Library is a legal deposit library for all published documents generated in South Africa. It provides a national bibliographic service and acts as the national bibliographic agency. It is required by legislation to provide leadership, guidance and advice to South African library and information services.

The National Library, through its Outreach Unit Centre for the Book, promotes a culture of reading, writing and publishing in all South African languages as well as easy access to books for all South Africans. Bibliographic Services, which is responsible for the South African National Bibliography, the creation of South African authority records, Index to South African Periodicals, hosting of the MARC office, and the national ISBN agency. Through these projects NLSA provide access to South Africa's national documentary heritage nationally and internationally, MARC training for South African cataloguers and supply both ISBN and ISSN to South African publishers.

Collections Management supplements cultural heritage via the purchase of South African documentary information published outside borders. It supports up to date, state of the art reference collection. It ensures that the South African periodical collection is complete and provides access to foreign official publications received on exchange agreements.

Document Delivery serves as the national coordinator of inter-library loans and resource sharing network in Southern Africa. They do international inter-library loan transactions on behalf of national clients, and make South Africa's documentary heritage available internationally. Information Services provides direct access to NLSA's unique collections at both the Pretoria and Cape Town campuses, and provides free Internet access supporting the right of freedom of access to information. As the leading library NLSA participate in national and international forums, including: LIASA and its Interest Groups, IFLA and its Sections, IME ICC 5, and international standards generating bodies. The National Library is also a member of the Heads of Places of Legal Deposit Committee and plays a leading role in the Legal Deposit Consortium. The Legal Deposit Coordinator is based at the National Library and is responsible for promoting legal deposit and facilitating the establishment of Official Publications Depositories in South Africa, thereby furthering access to information to previously disadvantaged groups. The National Library is a partner to the Department of Arts and Culture and facilitates special DAC projects, e.g. Reprint of African Classics, Indigenous language bibliographies. The National Library hosts the head-office of LIASA, the national library and information science body, leading to closer co-operation between LIASA and the National Library.

Challenges

1. The distance of the library from ordinary South Africans.
2. Gaps in the legal deposit processes for the five places of legal deposit.
3. The uneven availability of resources in all national languages.
4. The lack of interoperability and interconnectivity of library computer systems in the country.
5. The scope and content of its role of leadership for the library profession in the country is not defined.
6. The relationship between the NLSA and other memory institutions, i.e. archives and museums is not clearly articulated.
7. Lack of qualified and experienced cataloguers to catalogue the backlog of books purchased.

Recommendations

1. The NLSA should ensure that all publishers, including government departments, comply with the Legal Deposit Act.
2. The National Library should take the lead in arranging more affordable licences for electronic resources for South African libraries.
3. The National library should initiate and become involved in community projects.
4. The salaries of staff should be improved in order to attract, recruit and retain the highly skilled staff required to ensure the National Library maintains its position as the leading national library in Africa.
5. The National Library should act as custodian and champion of norms and standards for libraries.

ii) South African Library of the Blind

Objectives

1. The objective of the South African Library of the Blind is to provide a national library and information service to blind and print-handicapped readers in South Africa.
2. The Library is a National Library searching the reading and information needs of visually and print impaired persons throughout South Africa and increasingly Sub-Saharan Africa. Audio and Braille books are circulated to its widespread and extensive membership via postal delivery.

Challenges

1. Limited access to LIS for the blind and print-handicapped.
2. The perception of lack of involvement of its constituency in decision-making, hence the motto of people living with disabilities: "Nothing about us without us."
3. Conversion from the existing analogue system of the SA Library of the Blind to digital is incomplete and only partially funded. The digitisation process is inevitable if the library is to remain able to exchange books with other major libraries for the blind in the world.

Recommendations

1. Expand services through organised structures e.g. public libraries.
2. Address the Copyright Act limiting access and the expansion of products and servers.
3. Expand infrastructure to convert analogue collections to digital.

School LIS

Introduction

The chapter begins with a rationale for school LIS³ that underlies the analysis of their current challenges in South Africa. The analysis leads to recommendations for the transformation of the school LIS landscape – which, it is believed, will contribute meaningfully to the transformation of South African education.

The chapter synthesises information and comment gathered from sources mostly in the school LIS support services of provincial education departments. Some informants in the community LIS sector were interviewed specifically for their experience of dual use LIS. And the views of three groups of teacher-librarians are woven into the discussion – gathered by means of a brainstorm session for 80 participants at the post conference symposium hosted by LIASA’s School LIS & Youth Services Interest Group (SLYSIG) on 11 October 2008, and questionnaire surveys of two distinct groups of teacher-librarians. The first survey was of the 50 educators in rural and urban Western Cape schools, who are enrolled for the school LIS programme at the University of the Western Cape (UWC) in 2008. The second was sent out to school librarian members of InfoLink, the nationwide online discussion group for school librarians. The UWC students are almost all fulltime classroom educators. They all work in schools in poorer communities – this being a condition of the bursaries they are receiving. The Infolink members are mostly fulltime school librarians and can be assumed to work in schools in more middle class communities – as will be shown later.

The information-gathering from these sources is clearly far from comprehensive or systematic. The interviews, meetings and small-scale surveys provide snapshot views. But the consonance among sources is reassuring. It indicates that the picture of South African school librarianship and informants’ views provided in this section might be trusted.

3. The generic term “school LIS” is preferred in this document. Other terms in use in South African schools include “media centres”, “learning resource centres”, and “information-” and “knowledge- centres”. A modern school LIS provides access to and education in the use of a wide range of learning, information and reading resources – print, audiovisual, digital and online. Current definitions in South Africa are inclusive and pragmatic – thus allowing for different models of collection development and delivery. Similarly, the term “school librarian” is used generically to denote anyone who is in charge of the school LIS programmes. Most school librarians in South Africa are in fact “teacher-librarians” as they are expected to do subject and classroom teaching as well.

Overview

The premise that underlies this document is that good school LIS are essential to the transformation of the South African education system, which aims to provide quality schools for *all* South African learners. International research has provided convincing evidence of the vital contribution of school LIS to quality education and student achievement. Apartheid's Bantu Education calculatedly under-resourced the schools designated for black learners. If school LIS are essential to quality learning, then the principles of redress and equity enshrined in the South African Constitution and educational legislation mean that ways must be found to provide them.

The suggestion in the school and public LIS literature of the last ten years is that contradictions between the new resource-based curriculum and the lack of resources in schools have hindered transformation. The Minister of Education makes the connection as shown in her budget speech of 2006:

“Anecdotal evidence suggests that the high schools with the worst results are surrounded by primary schools that do not have the resources to teach effectively. It is important to stress that resources does not refer to money; it may refer to teacher competence, to an inadequate or absence of a LIS.”

The mere provision of a LIS will not create quality schooling. Any planning for South African school LIS must take into account the consensus in the international research literature that effective school LIS depend on the following interdependent factors:

1. adequate infrastructure - a proportion of the school budget allocated to the collection and a teacher-librarian in charge
2. a team approach. The relationships among principal, educators and LIS staff are crucial.
3. consensus on the kind of learning that is valued
4. integration of information literacy education in the learning programme.

Objectives of school LIS

The IFLA/UNESCO School Library Manifesto (2006) provides a concise description of the mission of a school LIS:

The school library provides information and ideas that are fundamental to functioning successfully in today's information and knowledge-based society. The school library equips students with life-long learning skills and develops the imagination, enabling them to live as responsible citizens.

The rationale for school LIS rests on four arguments:

1. The South African curriculum - in its ethos and its pedagogies - cannot be delivered without access to well-managed collections of learning resources.
2. South Africa's aspirations to compete in the global knowledge economy depend on producing information literate school leavers. Information literacy education is accepted internationally to be the specific mission of school LIS. A school LIS is more than a physical facility. It is rather a vital teaching and learning tool.
3. School LIS develop reading literacy. Educators might teach children *how to read* but access to attractive books in their home languages leads children to *enjoy reading*. And the more they enjoy reading the more they will read - and the better they will read. They will then develop the literacy skills they need for their academic work and everyday life in a democracy. South African learners came last by a long way in the *Progress in Reading Literacy Study* (PIRLS), which tested primary school learners' reading in 40 countries in 2006. The gap between the provision of school LIS in South Africa and other participating countries might at least partly explain our poor performance. Internationally, 89% of the study's respondents attended schools with LIS and 69% had access to classroom LIS. Half were taking books home from their classroom LIS every day and half visited the central school LIS at least once a week. The Department of Education's 2008 *National Reading Strategy* with its promise of collaborative projects to stock classrooms with attractive reading resources is encouraging.
4. The LIS is a force for social cohesion. A LIS that is open all day, after school hours, benefits the whole school community. It provides a safe space for serious leisure - for personal, social, and cultural development. It's a place for exploring oneself and the wider world.

Despite the arguments for school LIS presented in this section, their advocates have to confront the challenges of their social and educational context, which is very different from countries with well-developed school LIS systems such as Australia and the United States. In 1994, per capita expenditure varied between R5, 403 on “white” schools and R1, 053 on schools in the Transkei “homeland”. The provision of school LIS across the 19 education departments reflected

this inequality. And the inequality persists today, as evidenced in the input for this document. The *National Education Infrastructure Management System* report (NEIMS), published by the Department of Education for the first time in 2007, documents real progress since 1994 but there are still many schools without basic infrastructure.

The implications of the socio-economic and educational backlogs, which are the heritage of apartheid, are twofold:

1. The advocacy for school LIS has to convince that they are necessities not luxuries
2. Innovative models of service must be found. Any new models will, however, have to convince those who believe that only a central LIS in every school will fulfil the criteria of redress and equity.

State of & challenges to school LIS

There is agreement on the challenges for school LIS in South Africa:

1. their virtual non-existence – in terms of a space in the school, funding for reading and learning resources, and staff
2. the absence of national policy
3. the lack of capacity of the provincial school LIS support services.

Before these challenges are analysed, the fundamental issue has to be acknowledged –educationists’ lack of insight into the role of LIS. One of the strongest refrains in the interviews and submissions that inform this document relates to a perceived lack of understanding of the role of school LIS in quality education among policy-makers, principals and other educationists. The prevailing misconceptions can be categorised as follows:

1. A lack of appreciation of the links between what is generally acknowledged to be a “resource-based” curriculum and LIS. Learners are expected to construct their knowledge through exploration of information in a variety of media and resources. Learning is assessed by means of portfolios of work and independent project work. Supporting evidence for the demands of the curriculum for resources lies in the numbers of school learners who swarm to public LIS in the afternoons (Hart 2006).
2. LIS are seen as outdated collections of books. ICT – specifically the Internet – is seen as an alternative to LIS. There is little room for the conception of a LIS as a multi-media resource centre that offers access to the wide world of information and knowledge via a range of channels.

These comments illustrate this thread of comment:

“It is distressing that there is still no school library policy and no real guidance from the people in province. It makes no sense that libraries appear to be dispensable when the education system is theoretically aiming at research based self-study.”

“No one teaches or factors in information literacy skills. Too many teachers believe that

because youth can push buttons they are information literate. Meanwhile, it’s just the opposite.”

“The principal just makes empty promises. There is money but he does not prioritise the library.”

“The executive [in the respondent’s previous school] was totally oblivious to what the functions of a teacher-librarian are.”

“The main stumbling blocks to school library development in my province have been the lack of a national school library policy, the ignorance and prejudice of some officials and principals, and the indifference of senior management in the department.”

“Some schools have shut up their libraries – their books are gone. They think computers will do away with the need ...”.

Numbers of school LIS

Several respondents in provincial education departments provided estimates of the numbers of school LIS in their provinces. On the whole, they confirm the figures provided by the NEIMS report of the Department of Education in 2007. They document that only 7% of schools nationwide have a functioning LIS and that 13% have a LIS room that is not stocked.

School LIS figures by province⁴

Province	Number of “Operational” ordinary public schools			
	“Operational” ordinary public schools assessed Sum (1-3)	Schools with no library space (1)	Schools with library space that are reportedly not stocked (2)	Schools with library space that are reportedly stocked (3)
E Cape	5,724	5,179	378	167
F State	1,717	1,290	275	152
Gauteng	1,972	828	781	363
KZN	5,822	4,633	833	356
Limpopo	4,037	3,742	199	96
Mpumalanga	1,981	1,668	191	122
N Cape	620	438	109	73
N West	1,796	1,453	228	115
W Cape	1,476	709	394	373
Total 2006	25,145	19,940	3,388	1,817
% 2006	100.00%	79.30%	13.47%	7.23%
Total 2000	27,209	22,101	5,108	
% 2000	100.00%	81.23%	18.77%	
% change since 2000	N/A	-1.93%	1.93%	
Total 1996	26,673	21,907	4,766	
% 1996	100.00%	82.13%	17.87%	
% change since 1996	N/A	-2.83%	2.83%	

⁴ National Education Infrastructure Management System (NEIMS) report in the Department’s National Assessment Report 2007

These figures compare unfavourably with figures gathered in the 1990s by the HSRC for the Department of Education. The 2007 figures show the following percentages of schools with functional LIS in each province:

E Cape	2.9%
F State	8.8%
Gauteng	18.4%
KZN	6.1%
Limpopo	2.3%
Mpumalanga	6.1%
N Cape	2.3%
N West	6.4%
W Cape	25%

In its *National Norms and Standards for School Funding* legislation of 1998, the Department of Education acknowledges the challenges confronting the imperatives of redress and equity:

The Act does not interfere unreasonably with parents' discretion under the law as to how to spend their own resources on their children's educationIronically, given the emphasis on redress and equity, the funding provisions of the Act appear to have worked thus far to the advantage of public schools patronised by middle-class and wealthy parents (p. 7).

Government's redress strategy is to categorise schools into five quintiles according to the level of poverty of their surrounding communities. Resources are thus allocated on a variable per learner basis that favours the poorer segments of the population. As indicated in the NEIMS figures, the strategy has had so far little impact on the provision of school LIS. Information gathered for this chapter provides snapshots of the situation on the ground:

1. A key informant in the Eastern Cape education department's school LIS support services describes the situation in her province as "devastating". She reports that ground was lost between 1994 and 2004 when no attention was paid to school LIS. Only "ex-model C" schools in her province have LIS; her advisors are reaching only about 10% of schools; and she reports that there are no teacher-librarian posts.
2. The rural Bushbuckridge region in Mpumalanga has 333 schools, 33 of which have some sort of functioning LIS. None has even a part-time school librarian – the 33 LIS being run by educators in a few "free" periods a week.
3. In Gauteng, the 200 schools with librarians all lie within "wealthy" areas, their posts funded by the schools' governing bodies.
4. The impact of community poverty on school LIS is revealed when the responses to the two

questionnaires sent to two different groups of school librarians are examined. All but two of the Infolink respondents occupy governing body contract posts; all but two spend all day on LIS work; all keep their LIS open after school; and all report that their school management allocates an annual budget for the purchase of LIS materials. On the other hand, 47 of the 50 educators, enrolled for UWC's school LIS programme in 2008 and all working in poorer communities, are in fact full-time classroom educators. None reports any funding for LIS materials from school funds; none of their schools has a LIS open after school hours.

The NEIMS report reveals that 79% of schools have no space for a centralised LIS. It is difficult to interpret this figure since many schools have rooms originally intended to be LIS. The HSRC audit of school LIS in 1999 (Department of Education 1999) commented on the unavailability of many existing LIS, which are often used as classrooms or are shut for much of the day because the "librarian" is also a full-time teacher. The interviews and surveys informing this chapter lend support to this concern. They indicate that the most common model of "LIS" in South African schools is a books storeroom; yet this storeroom in many schools was designed in the past to lead into a LIS room – probably in most schools long since taken over for class teaching.

The new *National Norms and Standards for School Infrastructure* (Department of Education 2008) assumes LIS to be part of the learning space that every school must have. However, experience in recent years has been that the LIS space in new schools is not stocked or provided with shelves or other suitable furniture. Given the shortage of classrooms, it quickly becomes just another classroom.

School LIS policy-making

Perhaps the strongest concern expressed in interviews with key informants relates to what one called the "stalling" of the school LIS policy process. The Department of Education has produced for discussion five draft national school LIS policy documents since 1996, the latest in 2005. Each has grappled with the dilemma of the need for meaningful policy that presents unambiguous guidelines but which will also be feasible in South Africa's diverse conditions. Indeed, it would be counter-productive to draw up policies that are not implementable. Good news is the report to the charter team from the Children and Youth Literacy Directorate of the Department of Education that it has drafted another school LIS policy. However, this document has yet to be circulated.

All informants agree on the need for national school LIS norms and standards. Informant after informant talked of the need for leadership from "National". Without the stamp of approval from the Ministry of Education that a national policy statement would bring, it seems that little progress can be made. Some provinces, like KZN, Free State and Mpumalanga, have formulated their own policies. However, informants inside the education departments of these provinces acknowledge the limitations of these provincial initiatives, especially with regard to the provision of school librarian posts.

The call for the finalisation of national policy is almost always accompanied by a call for the re-establishment of the national school LIS unit within the Department of Education, which should drive the policy processes and guide the implementation nationwide. This unit needs to be highly placed in the departmental hierarchies and able to communicate with all phases and with specialist ICT and e-learning units. The central role of this unit would be to draw up implementation plans for policy, perhaps by revisiting the draft implementation plan of 2000 that suggested strategies, goals, and costs over a four year time frame (Department of Education, 2000). KZN's ELITS's business plans and modelling might provide a model for the rest of the country.

Much of the school LIS policy debate revolves around school LIS model. The Department of Education's first and second policy drafts in 1997 and 1998 proposed a complex sliding scale of seven models. The approach tacitly accepts that providing every school in South Africa with its own school LIS is not feasible. It is suggested that school communities adopt a model that suits their present circumstances and gradually move up the scale, in response to the evolving demands of their learning programmes and their growing capacity. Subsequent policy drafts have reduced the number of models. KZN's policy for example puts forward three models:

- mobile classroom collections - replenished frequently from education centres or community LIS
- a cluster LIS in an educational resource centre, a well-resourced school or a community LIS, which serves a group of schools by means of mobile bus LIS
- a centralised school LIS.

According to reports from the Eastern Cape and Free State, clustering schools around one LIS in a fellow school is problematic. The Free State's policy therefore identifies only two models of service: classroom collections and centralised LIS. A certain vagueness over the progression from one model to another and ambiguity over the role of teacher-librarians, as well as a desire for redress of unfairness, might explain why the 80 participants in SLYSIG's 2008 post-conference workshop unanimously voted for the one-school-one LIS model. The affordability of this model was not debated.

Various solutions to the problem of lack of space are put forward such as:

1. classroom collections
2. clustering schools around one facility in order to share resources and space
3. mobile LIS
4. container LIS, such as those commissioned by the NGO Biblionef.

The question of dual use school/public LIS is discussed in a later section.

The challenge for the charter is to present a vision for school LIS for *all* South African schools but which takes into account current realities. Flexibility, close-to-the-ground knowledge of local conditions and openness to innovative models will be called for.

Governance & management of school LIS

The gap in school LIS leadership at national level has already been referred to. There was strong comment from several informants in provincial structures on the disappointing closure of the school LIS unit in the Department of Education. One provincial official regretted the demise of SCHELIS, the committee of provincial heads of educational LIS which used to meet regularly until 2004 and which channeled school LIS information and advocacy to the national Ministry of Education via the national Committee of Education Ministers (MINMEC).

All provinces have an education LIS service within their education departments. Most - but not all - include a wing responsible for the development and support of school LIS. The influence of these services is constrained by their rather low status within their parent education departments and the small size of their staffs. The relative success of KZN's ELITS is frequently attributed to its directorate status.

It is clear that the groundwork in establishing school LIS in South Africa is being done by school LIS advisors, designated "education specialists" and at various grades, in these school LIS support services. Their descriptions of their work tell of the challenges of establishing LIS, training educators, sustaining programmes and managing special projects. Given the pressures in schools, the KZN model of centralised ordering, processing, cataloguing and delivering shelf-ready materials has much to offer, although clearly this is beyond the capacity of the other provinces at present. Another viewpoint is that this might disempower the school librarian on the ground and remove the pleasure of handling new books from scratch.

It is also clear that the school LIS advisors in all provinces struggle to cope with the large number of schools under their wings. One Free State respondent has 156 schools in a mountainous rural area to look after; another from Port Elizabeth in the Eastern Cape has 300 schools in her urban district; another in a rural area of Mpumalanga has 333 schools. Various coping strategies are employed. KZN's strategy to cope with the numbers is to cluster schools around LIS in their 12 regional education centres. A Free State respondent runs training workshops for a group of schools but concentrates on making a real difference in one school each year. That school in 2009 will receive books to the value of R500 per learner and the services of an "information worker" one day per week to set up the collection.

Given the limited capacity of the existing school LIS support services and in provinces where school LIS support services do not exist, there might well be a case for other role-players to step in and offer services on an agency basis. An international example is the SLSS agency service that the Walsall Council in the United Kingdom runs in support of its schools. Not all agencies need offer all services. For example, a public LIS service might just undertake the ordering, cataloguing and processing of materials thus allowing the school LIS support services to concentrate on literacy and information literacy education.

Infolink respondents identify the factors inside the school that are needed for the successful management of LIS. The fundamental requirement is time. Support of the principal and educa-

tors is crucial and a LIS committee, comprising educators, parents and learners, is essential. Its functions are choosing a LIS model appropriate for the school, developing a LIS policy, and developing a whole-school information literacy policy which will integrate the use of resources in learning across the curriculum. The school librarian needs senior status if he or she is to have access to curriculum planning and design. One respondent mentions the need for “respect”.

Several respondents suggest that administrative staff might perform much of the routine administration of a LIS – perhaps under the guidance of part-time school librarians who would be freed of much of their subject or classroom teaching to focus on information literacy education across all learning areas. The appointment of administrative and support staff is a provincial responsibility. The Free State provides a model in its team of “information workers” drawn from the ranks of unemployed educators. Typically, each is responsible for five schools and spends one day a week in each.

School LIS provisioning and expenditure

In theory the *Norms and Standards* allocations to schools should provide funds for school LIS. However, it seems that the only schools that budget for a LIS are the independent schools and the so-called ex-Model C schools, which rely on their governing body funds to do so. If, as already suggested, principals, parents and educators in most South African schools lack insight into the *need* for a LIS, then the neglect is understandable.

In the absence of schools’ budgets, several of the provincial school LIS support services provision schools with LIS materials. One informant believes that provinces have no choice but to step in since, even if schools had the will to buy LIS materials, they lack the capacity to select and order materials:

“Principals use their budget as they wish because some do not know how to spend it. Even when they know, they do not prioritise LIS. One can then argue that if the province does not show the importance of LIS how can anyone else?”

There is no uniform approach to the sourcing and allocating of the provincial funds for school LIS. Amounts vary tremendously: nothing in several provinces; R5 million in the Eastern Cape in 2007; R40 million in KZN between 2005 and 2007. In many provinces such as the Eastern Cape there were no funds until quite recently and so the backlogs grew. In some, the money comes from the operational budget allocated to the Education Department’s LIS. In the Western Cape no central provisioning of school LIS was undertaken until 2007 when EDULIS applied for support from the quality improvement project QIDS-Up of the Department of Education specifically for the establishment of LIS in lower quintile schools.

Mpumalanga’s projected budget for 2009/2010 provides a picture of the likely costs of provisioning school LIS in a province. Arguing that “OBE cannot work without adequate and appropriate resources”, its R120 million budget for 2009/2010 includes the following:

1. R80 million for LIS resources for the province’s 2000 schools

2. R10 million for 62 well-provisioned Focus School LIS - thus about R160,000 per school
3. R10 million for curriculum software
4. R10 million for the training of 5000 educators and 300 curriculum developers in ICT and LIS coordination skills.

The supporting documents point out that current spending is about R34 per learner whereas R100 per learner is required if international standards of 10 LIS items per learner are to be met.

There is comment that unwieldy tendering processes delay LIS provisioning. In one province a delay led to unspent funds which led to a reduction in budget the following year. KZN’s solution is to apply for annual exemptions from normal tender procedures for procurement of LIS materials.

The sustainability of current approaches has to be questioned. Project donations, such as those provided by QIDS-UP and the 100 Books per Classroom project, are invaluable, as shown in the Western Cape where the aim is to provide core collections to kick-start LIS in the poorest schools of the province. However, the project donations are usually once-off and demand formidable project management skills. Ongoing monitoring is required.

Probably, the only way to persuade schools to budget for LIS is to ring-fence a proportion of their allocations each year, explicitly for LIS materials. The term used in government documents “learning and teaching support materials” (LTSM) has proved too vague. In Gauteng, policy already ensures that 10% is reserved for LIS materials. Allowance is made in the first year or two for the funds to be used for LIS furnishings.

Human resources

One informant claims, “A school LIS without someone to run it on a daily basis is a waste of money”. Several anecdotes from school LIS advisors of finding unopened boxes of books support the claim. There has to be someone in the school to manage the resources and to champion their productive use.

A comparison of the data gathered from the surveys of members of the school librarians’ national online discussion group, InfoLink, and the 50 teachers enrolled for UWC’s ACE (School librarianship) programme in 2008, lends support to the need for dedicated LIS staff. All 28 InfoLink librarians who sent in responses have full time posts running their LIS and teaching information skills. Their LIS are open for most of the school day and after school. Several report that in the afternoons they rely on other educators who step in as part of their extramural responsibilities. The survey of the 50 UWC students and the responses of the 80 participants in SLYSIG’s meeting 11 October 2008 show a different picture. Of the 50 UWC students, none has a full time LIS post; in fact, only three have any time free of teaching each week to run the LIS (all three reporting they have three hours “free” per week). It is not clear what role their LIS are playing in the life of the school as, as already mentioned, only three reports that their LIS is

open in the school day and none is open after school.

Reynolds's paper at the school librarians' conference of the Independent Schools Association of South Africa in 2008 documents what she calls the human resources "crisis" facing South African school librarianship. She shows how the cohort of qualified school librarians is aging: by the time the current Grade 7s reach Grade 12 in 2013, 43% of all school librarians will have retired. The lack of posts in government schools limits career opportunities and is hampering the entry of young professionals into the field.

Apparently, only two universities offer formal education programmes for school librarianship – the University of KwaZulu-Natal and the University of the Western Cape. The distance university UNISA has closed its programme, presumably because of dwindling numbers.

Collaboration between school and public LIS

The dire shortage of school LIS and the urgent curricular and information needs of South Africa's young people imply the need for collaboration among government sectors, which is, after all, a constitutional principle. Yet, collaboration is hampered by the fact that school LIS and public LIS fall under different government departments at national and provincial level.

Both kinds of LIS share a role in education. Many public LIS for example run early childhood development and adult basic education programmes. Their contribution to formal school education has grown hugely in recent years as learners flock to them in search of resources for their assignments. The absence of LIS and information literacy education in schools leaves the learners ill-prepared for their project work and community LIS staff members are obliged to intervene.

Dual use or combined school and public LIS have been mooted since the late 1990s when UNESCO hosted a consultative workshop and established a committee to investigate LIS cooperation. The project faded but today there are examples of dual use LIS scattered throughout the country. Some are community LIS serving a number of nearby schools; others are situated in rural schools and are open to the surrounding community after the school day.

Mention of dual use models often provokes a quick negative reaction among school librarians. Fear that the fundamental differences between school and public librarianship will be ignored perhaps explains the negativity. School librarians know that learners need close and easy access to a resource collection if they are to integrate information skills into their learning. School librarians would claim to be educators as much as information providers. Other reservations perhaps emanate from concerns that the larger better established public library services will swallow up the school LIS support services who are struggling to survive.

A fundamental criterion is that the service in a dual use LIS must equal that of two separate LIS. The predictors of success identified in international research should be considered before deciding on a dual use LIS, for example:

1. written legal agreements on governance, administration, finances, assessment and termination
2. a decision-making committee representing all stakeholders
3. visible and convenient location
4. a separate area for adults
5. connections to a larger network
6. supportive principal and educators
7. one highly motivated professional in charge, preferably qualified in both education and librarianship (Haycock 2007).

The principles for an effective school LIS mentioned in the introduction cannot be ignored. Research is needed to assess whether South African dual use LIS conform to these fundamental principles.

Perhaps less extreme forms of collaboration might satisfy the concerns of the school LIS sector. An example was given earlier of public LIS being employed to process and provide resources on behalf of school LIS support services.

Recommendations

There was general agreement among informants on what is needed to meet the challenges discussed in the previous section.

1. The need to communicate and market more forcefully the role of school LIS in learning is clear. The underlying problem for school librarianship is a prevailing lack of understanding of its role in teaching and learning. Many of the recommendations that follow involve structural shifts designed to improve the position of school LIS. However, other internal or subjective shifts in educators' conceptions of learning and LIS will be required.
2. A national school LIS policy that provides norms and standards for the establishing and provisioning of LIS is the first step to redress the situation. It will act as an impetus for provincial education departments to recognise the need for LIS and will provide authority for the work of the school LIS support services. It will also persuade schools' governing bodies to develop their own LIS policies.
3. The national school LIS unit within the Department of Education should be re-established to drive the policy processes and guide the implementation nationwide. The unit needs to be highly placed in the departmental hierarchies, and led and staffed by qualified school librarians. The unit should work closely with all phases of education and with ICT and e-

learning specialist departments.

4. Directorate status for the provincial Education LIS and Information Services responsible for school LIS will bolster their influence. Where school LIS support services do not exist or lack capacity, other role-players, such as community LIS, might be employed to establish and maintain school LIS on an agency basis.
5. Different conditions call for different models of service. Examples that might offer at least temporary solutions to the prevailing problems of lack of space include:
 - a. classroom collections in primary schools, replenished frequently from the stocks of education centres or community LIS
 - b. clustering schools around one facility in order to share resources and space
 - c. container LIS.

These models will not be regarded as ideal or permanent solutions and schools will be encouraged to progress to different models as their circumstances change.

6. In some communities, education and public LIS authorities might together establish dual use school community LIS, available to the school in the school day and open to the community after school hours. Memoranda of understanding and policy will clarify the roles and responsibilities of the governance structures.
7. Every school learner must have access to a living up-to-date collection of reading, learning and information resources. Whatever the delivery model, a minimum of three items per learner will be required. The initial establishing and provisioning of the chosen LIS model will be the responsibility of the provincial school LIS support services or an agreed upon alternative agent, in consultation with school management
8. Thereafter, school LIS programmes will be sustained by annual allocations from schools' budgets. It is recommended that 10% of schools' learning and teaching support materials (LTSM) budgets be assigned to the LIS programme.
9. National policy will establish full- and part-time school librarian posts. In some circumstances, administrative staff might be appointed to perform the routine administration of a LIS – under the guidance of a part-time school librarian whose main focus will be information literacy education and the nurturing of reading literacy. LIS committees, comprising the LIS staff, senior managers, educators and parents, will draw up school LIS policy and will oversee and support its implementation.
10. Once posts exist, school librarian education programmes will expand. In partnership with provincial education departments, universities' education faculties and LIS schools will be encouraged to set up advanced certificate programmes and other courses for educators.

UNISA should re-establish its school and children's librarianship programmes.

11. Both formal and informal education programmes should harness the knowledge and expertise of the existing cohort of excellent school librarians. Mentoring programmes should be established by means of collaboration among LIASA's SLYSIG and other professional associations, provincial education departments and universities.
12. Diverse LIS collections and information literacy programmes offered by educators and school librarians together will nurture the critical thinking required in South Africa's democracy.
13. Finally, the urgent social, health and educational challenges facing South Africa's children and youth necessitate more active collaboration among sectors. National and provincial Education and Arts and Culture departments, public LIS authorities, professional associations, schools and universities need to share the responsibility of building effective LIS programmes that will help young people to make sense of their lives.

Expenditure trends

Overview

Ascertaining expenditure trends over the entire library and information sector is a mammoth task that would require a lot of investment in time in the collection of data. Data to assist with the establishment of the expenditure trends is unevenly spread across the sector owing to differing capabilities of sectors to collect and report on information on library expenditure. The KPMG report showed that, owing to lack of information, estimations were made to gauge the expenditure on libraries by municipalities.⁵ This analysis of expenditure trends ideally should have sampled the school libraries as they constitute the dominant type of library across all provinces. However, given the number of schools in the country (in excess of 27 000), and the fact that school libraries do not seem to function well, the task of collecting and reporting on information on school library expenditure is too enormous a task with great financial time implications for the transformation charter. Efforts to obtain expenditure statistics from a selected number of university libraries yielded no results. Of all the types of libraries in the country the public libraries provide the most viable sector to sample in tracking the budget trends, owing to the fact that the KPMG Report provided a comprehensive although not reliable coverage. However the point has to be stressed that the purpose for ascertaining trends is to produce a tool to assist in making a business case for increased and reliable commitment of funds to the sector.

Library and information services ranging from public/ community, school, special and universities libraries, all experience varying degrees of financial challenges that reveal discernable expenditure trends in the country. Owing to the transformation imperatives of redress and expanded service delivery, the inclusion of ICT in teaching and learning and the challenges of globalisation, university library and information services face financial challenges in resourcing the increasing demands. In Special libraries there is a discernible trend relating to posts and market related salaries that tend to be lower. The inadequate funding for reading and learning resources and for salaries of dedicated school librarians is a well established cause for complaint for school libraries. Results of analyses of the expenditure trends across the library and information services sector decry poor funding and prioritizing.

⁵ DAC Public Funding Model- Phase 2 (Report 2 of 3) final- June 2007. 153.

In the South African context the provision of the public library service is a provincial competency and provinces are expected to provide the bulk of the funding. A focus on the public libraries must keep in mind that these institutions were formerly designed and structured to address the needs of the minority of educated middle class clients, and that their geographical spread was skewed, with the highest concentration of 150 per 10 000 square kilometer for Gauteng because it is the smallest province with high infrastructure and resources.⁶ The expenditure trends for the public libraries will thus reflect the expenditures at the three tiers of government, namely; national, provincial and municipalities. One of the limitations of this section is that it has relied extensively on the data and conclusions reached by the KPMG report.

Objectives

The main objective of this chapter is to provide information on expenditure trends so as to make a business case for increased budget allocation for the provision of accessible and resourced library and information services to meet the constitutional requirements of an informed nation within the growing knowledge economy. The analysis of the current funding model clearly reviews the inadequacy of the funding structures, the amounts allocated and the capacity to plan for robust library and information services for the knowledge society.

Challenges

One of the challenges that had beleaguered the public libraries in South Africa was that the National funding by the national Department of Arts and Culture amounted to R50 million per year for 2002/3 through 2006/7.

An analysis of the financial commitments reveals that there has been limited involvement by the national government in the funding of public libraries. As in the past, the national Department's role has been limited to funding the National Library of South Africa and NCLIS. The pattern of national government expenditure changed with the allocation of the R1 billion additional funding - the Conditional Grant - that had been made available for the three financial years starting in 2007/8. Owing to the fact that the conditional grant is transferred to the provinces it gets reflected as provincial expenditure.

While the national budget did not reflect growth of the budget, the provincial expenditure showed a growth from R100 million in 2000/1 to just over R400 million as projected for 2009/10. A big proportion of this expenditure however, was dominated by current expenditure with limited capital expenditure on new buildings and equipment of R50 million per year over the same period. Another challenge is that municipal funding has been dominated by staff and general operating costs. It has been observed that capital expenditure has been almost non-existent outside the six metro cities.

⁶ DAC Public Funding Model- Phase 2 (Report 2 of 3) final- June 2007. 44.

In the public sector the spending burden on libraries has been carried by the six metro cities leaving most of the municipalities with minuscule expenditures on library and information services. It has been noted that the awarding of the 2010 World Cup to South Africa put pressure on the government to address the backlogs in sport related issues and resulted in the library and information services, decreased share of the provincial budgets from 24% of the total in 2002/3 to as low as 20% in 2005/6.

The introduction of the Department of Arts and Culture national conditional grant contributed to the MTEF budget share allocated to library and information services to increase to 22% of the total by the 2008/9 financial year. Another positive trend that has emerged is that local municipalities have been spending substantially more than the provincial and national government over the period of 2000/1 to 2008/9. However, that provincial and local municipalities are not spending much on infrastructure development of public libraries is a matter of concern as the recapitalisation of libraries will suffer and the national conditional grant will not suffice to replace the infrastructure.

The other trend worth worrying about is that local municipalities' budgets tend to be spent largely on recurrent expenditure such as personnel salaries.

In the public libraries as well as school libraries, far less money is spent on ICT equipment. The provision of better and modern library and information services will be greatly hampered by this expenditure trend.

The South African national library budget per capita, at US\$3 per capital per year is low in comparison with Australia (US\$42) UK (US\$36), Canada US\$18) and Finland standing at US\$12 per capita per year.⁷

Uneven data collected on the school libraries portray a serious lack of a coordinated and uniform funding policy framework. Chapter Five of this charter has a section on school library provision and expenditure that reveal the varying approaches by provincial governments, independent schools and the ex-Model C schools. The current expenditure trend on school libraries is unsustainable and ad hoc and cannot provide a strong basis for a competitive society. Data from interviews from full time classroom educators revealed that school libraries are poorly funded.⁸ The challenge with school libraries is that there are no dedicated posts for libraries, no strategic interventions for the uptake of ICT in the school libraries and unwieldy tendering process that delay provision. Unless expenditure on the uptake of ICT in the school and university libraries is taken seriously the country's education system is unlikely to produce competitive learners, students and future workers.

Data on expenditure trends in university libraries has been extremely difficult to access. The perception held by many participants in the public consultations was that there was widespread variation in the allocation of financial resources in the libraries. The allocation of funds to uni-

⁷ KPMG Report

⁸ See Chapter Five for more details.

versity libraries is dependent on priorities set by individual universities and there is no norm agreed upon by institutions to guide in the allocation of resources. The approach has culminated in unequal funding of libraries and the continuation of disparities between them. International funding by corporations such as the Carnegie, Ford Foundation and the Andrew Mellon Foundation have been very useful in further enhancing the capabilities of university libraries. For example, the Carnegie Corporation has invested almost R75-million in South African libraries in the last four years.⁹ That the inequalities between university libraries in previously privileged and disadvantaged universities persist has implications for the quality of education offered to the citizens of the country.

Recommendations

It is clear that additional funding is required for all sectors of the library and information services. It is evident that in the case of public libraries provincial revenue streams do not display the potential to generate funds for the library and information services. In addition, there are two categories of needs that require different solutions: infrastructure creation and operating needs. Funding is available for both categories, but the funding available through Provincial Equitable Share for the operating need is not library-specific, whereas available funding for infrastructure specifically includes public library services. It is recommended that the funding available through the provincial equitable share be made library specific.

In order for the South African library and information services to continue to provide up to date information to the communities, a well thought out funding model needs to be in place. In order to develop library and information services to the extent of every community having an accessible library that includes new visions of libraries playing recreational roles, the funding of the sector needs to be placed at the sustainable funding levels.

It has been recommended that any funding for this service from the national revenue should eventually be folded into the equitable share allocation on a province by province basis. If this cannot be done, conditional grants will have to continue until the last province has met the criteria for folding the allocation into equitable share, which would cause unnecessary administrative work for the Department as well as for the provinces that have met the criteria.

The conditional grants should be treated as a supplement rather than a substitute for the provincial allocations.

Both the conditional grants and the equitable share allocation methods of funding the library and information services should be promoted for short and long term investments in libraries.

1. The conditional grant should be used as a short term intervention funding to address the historical backlogs and imbalances in historical patterns of expenditure in library services. The type and number of conditional grants should be streamlined to allow for directed focus on key priorities to address the backlogs.

⁹ <http://www.library.up.ac.za/aboutus/carnegie.htm>

2. Once the conditional grants have reduced the backlogs the funding should be included in the equitable share allocation funding model. The equitable share allocation method of allocating funds for the library and information services should be promoted for the long term investment in order to address strategic interventions of a long term nature.
3. Provinces and local government should be encouraged to invest in infrastructure such as buildings and ICT, contrary to current trends.
4. Provinces and municipalities are encouraged to prioritise the provision of library and information services in their budget planning.
5. As the issue of posts and market related salaries affects the whole sector there is need to address it nationally by preparing minimum uniform norms and standards.
6. Schools must be persuaded to budget for school libraries by ring fencing a proportion of their allocation each year for library material and ICT uptake.
7. Funding of university libraries should be holistic and be treated as a core activity of the universities and its budgets prioritized. A funding model with norms to guide universities on structured financial allocation need to be put in place.
8. NCLIS should commission a baseline study to establish funding trends throughout the Library and information service sector.

Recommendation

The recommendation on a funding model has considered the different funding options that can be used to fund public libraries. It has looked at conditional grant and equitable share options and made suggestions in the short and long term on how to fund public libraries. The charter recommends that the funding be distributed in the form of a conditional grant to be folded into the provincial equitable share over time.

Library and Information services are an essential component of a knowledge economy whose resourcing should be placed very high on the national agenda. It is recommended that the National Treasury provide a ring fenced allocation for the sector.

The private sector is encouraged to share the responsibility of funding libraries as it has an obligation as part of its social responsibilities.

Human Resources Development: Education and Training and Employment trends

Overview of education and training

Education and training programmes are provided by the following categories of providers:

Education and training of LIS professionals in the formal sector

Education and training for LIS is offered by the following universities:

- Durban University of Technology, Department of Information Science
- University of Cape Town, Department of Information and Library Studies/Centre for Information Literacy
- University of Fort Hare, Department of Information and Library Science
- University of Kwa-Zulu Natal, Department of Information Studies
- University of Limpopo, Department of Information Science
- University of Pretoria, Department of Information science
- University of South Africa, Department of Information Science
- University of Western Cape, Department of Library and Information Science
- University of Zululand, Department of Library and Information Science
- Walter Sisulu University, Department of Library and Information Science

The entry-level qualifications offered in various combinations by these institutions can be classified in the following way:

1. An undergraduate diploma of either three years or two years duration.
2. A one-year advanced certificate in education for school librarianship for qualified educators.

3. A three-year undergraduate degree programme in which an information science major is combined with a major and courses in another discipline.
4. A four-year professional degree in which majors in library and information science are combined with a major and courses in another discipline.
5. A postgraduate diploma in LIS, offering a capping vocational qualification on top of a degree in any discipline. This qualification is offered by four universities.

The curriculum, described in a variety of ways, covers the following core areas:

1. Study of user needs and user behaviour
2. Information and knowledge management
3. Information storage and seeking
4. Knowledge organisation
5. Knowledge representation
6. ICTS and their application

Each of these courses covers a number of topics and themes related to the broad area. All the institutions provide opportunities for further study through Honours, Masters and Doctoral degree programmes.

Between 2000 and 2006 the number of institutions offering education and training programmes was reduced from 18 to 12, following a contraction in the traditional labour market which accompanied the declining funding base of public libraries in particular. The Department of Arts and Culture has launched an investigation into the formal provision of education and training for LIS and archival science.

Workplace learning

The Standards Generating Body (SGB) for Library and Information Services has completed two qualifications, viz. The National Certificate in Library Services at NQF Level 5, and the National Diploma in Information and Library Studies (NQF level 5). These qualifications will provide vocational education and training for those already in employment, thus making use of their prior learning. Training providers have to be accredited by the relevant ETQA. The registration of these qualifications opens up possibilities for certification of workers in the field who have previously been denied the opportunity for career advancement and the recognition of prior learning. They should make a significant contribution to meeting the challenge of skills shortages in the workplace reported uniformly by public library managers during the public consultations.

Continuing professional development

Following a national survey of its members to establish their training needs, from which emerged the need for a centralised and focused agency, LIASA has adopted continuing education and professional development as a strategic objective through its Continuous Education and Professional Development (CEPD) and Centre for Information Career Development (CICD).

Objectives

For library and information services to respond appropriately to the needs of communities served, and to contribute effectively to the goals of the national agenda, the following should be taken into account:

1. It is essential that the education and training provision is suitable both with respect to capacity to meet labour demand, and also with respect to curriculum to supply the knowledge and skills required in a field that has changed dramatically in the last decade. Driving the change are socio-political factors and the technological revolution moving us towards a knowledge society, where the use of information in all domains is critical for development and success.
2. The librarian/information professional in the evolving knowledge society in the 21st century requires an expanding set of discipline-specific as well as generic knowledge, skills and attitudes for the changing environment and mission of the library service.
3. The discipline specific knowledge is framed by an understanding of the role of information in a knowledge society, which is the guiding philosophical framework for the librarian/information professional. Information organisation and is the unique knowledge that defines the profession.
4. Collection development and management are core competencies, as are information resources and retrieval.
5. The librarian needs to be thoroughly versed in the application of information and communication technologies (ICT) to library operations and for the use of clients.
6. Information literacy is an important part of the librarian's repertoire of skills; both so that the librarian may work competently with information, and be able to impart literacy education to the library's clients. The ability to act as a mediator between a client and information constitutes a set of new skills required in the information age and epitomises the shift in orientation from the custodial role of the librarian to the role of mediator.

Among the generic skills required by the librarian, the following are essential:

1. Communication skills: the ability to communicate with clients and stakeholders, verbally, in writing and through facilitation of sign language/sign language interpreter when necessary.
2. Partnership: the recognition that no single library service can meet all the needs of its community.
3. Political awareness: an awareness of the role of the library in the political and institutional landscape.
4. Advocacy: the ability to advocate for the particular library, and the library system and profession as a whole, demonstrating the value of its contribution to the community, opinion leaders and decision makers.
5. Marketing and promotion: In order to establish a reading and library culture it is necessary to promote the activities and value of the library to potential clients.
6. Problem solving and critical thinking: the ability to identify problems and gaps, and apply creative solutions.
7. Management: the ability to manage effectively, and to draw up and manage budgets.

Challenges

A unanimous call rang throughout the provinces for transforming the education and training highlighting the following challenges:

1. The demands of a service that is well integrated into the private and public life of the nation, offering clear value to individuals, groups, commerce, industry, the economy, education, and government.
2. The design of a curriculum aligned with the objectives and values of the emerging profession and to share in the task of attracting to the profession young people who can identify with its dynamism and role in a modern developmental state.
3. The unfavourable CESM classification of LIS in Funding Group 1 (the lowest) at universities does not reflect the actual cost in comparison with other comparable disciplines requiring access to costly equipment may act as a disincentive to universities to offer the programmes at a time when education and training for LIS has reached a critical juncture.
4. The imminent closure of the oldest department offering LIS education and training (University of Cape Town), and the curtailment of many of the programmes at UNISA.
5. Perhaps, owing to the lack of government posts for school librarians, there are limited education programmes for school librarianship; UNISA recently closed its programme.

Recommendations

The evidence indicates a way forward for the training institutions:

1. Curricula should be modified to reflect the changing role of the librarian as a mediator/facilitator which requires on her/his part a particular set of skills and an attitude of mind in addition to the traditional technical skills.
2. This orientation highlights the importance of knowledge as a strategic factor of development for citizens, for industry, for institutions and for government, and equips the librarian to ensure that the library is an active agent in the knowledge chain.
3. The user-centred approach requires that attention be given to communication skills, appropriate linguistic ability and responsiveness to user needs.
4. In addition to the fieldwork component, it is recommended that a service learning component be incorporated into the curriculum. **Service Learning** is a course-based, credit-bearing educational experience in which students (a) participate in an organised service activity that meets a community need and (b) reflect on their service activity as a means of gaining a deeper understanding of course content, a broader appreciation of the discipline, an enhanced sense of civic responsibility, and a greater interest in and understanding of community life (Bringle & Hatcher, 1995).
5. Those already employed wishing to advance in the workplace, should be encouraged to register for a formal qualification thus making use of their prior learning.
6. Employing institutions should adopt the internship model of initial staff training, recruiting suitable candidates for their institution, and facilitating their formal training through work-study release programmes and fees support, while considering equalisation of opportunities for people with disabilities in this regard.
7. The NQF stipulates a four-year qualification for professions. The sector needs to adopt a position about a suitable qualification structure that will strengthen the profession and enhance the professional status of librarians.
8. LIASA should participate in the accreditation process whereby training institutions submit their programmes through their relevant academic structures for approval by SAQA.
9. LIASA should also undertake to establish a mechanism to accredit professional librarians.
10. LIASA and other stakeholders should take steps to ensure that universities do not take unilateral decisions to close library schools or programmes without consultation with the profession.
11. There should be an audit of all employment opportunities.

The investigation by the Department of Arts and Culture into the formal provision of education and training will chart a more detailed path for library schools.

Overview of employment trends

Training, recruitment and retention of qualified staff was raised in all the consultative workshops as a significant factor for the transformation of the library and information services throughout the country. It was noted that although there was a supply of professionally trained librarians within the country, participants decried the employment of unqualified staff in the library and information services. In all the consultation workshops the review of the remuneration packages and conditions of service for librarians was identified as a necessary intervention in the process of transforming the library and information services in the country.

Objectives

In order to meet the national goals, and the objectives of the sector,

1. professionally qualified librarians should be recruited and retained in the sector.
2. they should receive a salary commensurate with their training, expertise and skills.
3. they should enjoy conditions of service comparable with other professional occupations.

Challenges

The Library and information services sector has many challenges in relation to employment of both the professional and non-professional staff. The Transformation Charter has identified the following challenges in the sector:

Employment trends of qualified librarians

The public consultations and research has revealed that the LIS has the following challenges in relation to the qualified librarians:

1. Staff turnover: Information from a number of major institutions has shown that there is high mobility in the sector. It is hoped that the imminent DAC investigation into education and training for LIS will provide reliable data needed as a basis for making recommendations.
2. Ageing workforce: Respondents at the indaba agreed that an ageing workforce threatens continuity in the profession. The sector has not been in a position to collect baseline data and it is therefore necessary to establish the average age of qualified librarians, figures necessary for planning and training for new middle and top-management positions for succession planning.

3. Structural changes: Although there was not much hard data emerging from the consultations, there were numerous comments about the impact of structural change on the LIS sector. There was agreement that staff appointments and retention and freezing of posts were affected by mergers (higher education libraries) and restructuring (public libraries and government departments). Dissatisfaction was also expressed about instances at provincial and local level of political interference in the appointment of staff.
4. Salaries: The impact of the grading of posts by municipalities of different sizes was noted.

Employment trends of unqualified staff

The conditions driving institutions to employ unqualified staff in professional positions require unraveling to provide understanding and establishment of the trend. The role of unqualified staff as “library assistants” in many instances was seen to be ineffective and to reduce the service standards. The important role of volunteers was seen to be undermined by bureaucratic obstacles.

Migration and preferred destinations of qualified librarians

Many reasons have been advanced to explain the high mobility in the sector, including the following:

1. A competitive information sector employment market; emerging areas of knowledge management, records management and digitisation as strong career pathing.
2. Instability caused by the search for better opportunities by qualified and experienced staff
3. Better remuneration packages elsewhere as a source of mobility.
4. Rural–Urban pull factors
5. Public–Private push and pull factors
6. Salaries - movement across sectors, e.g. from University libraries to Provincial libraries and vice-versa.
7. Globalisation – international recruitment

Market drivers of library skills needs outside the LIS sector

Emerging areas of knowledge management, records management and digitisation as strong career alternatives were some of the areas cited. However, the following list is more comprehensive:

1. Information and knowledge management growth especially in public and private sectors.
2. Records management – there exists an overlap of skill sets;
3. ICTs – are a stronger component in library education leading to wider marketability;
4. Salaries and growth – small business opportunities in the information industry, and attraction of private corporations.

The remuneration trends across the country

The South African market for the librarians is differentiated across the rural-urban divide, the national, provincial and local government divide, the public and private service divide. Remuneration packages are also affected by factors such as the institution \which awarded the qualifications and racial factors. The geo-political factors such as Gauteng centricism also affect the remuneration packages. Even within the public service there is little recognition of the librarian professional and hence the marginalization librarians in terms of remuneration packages and working conditions .

Implications of the employment trends for the Library and Information Sector

The cross-country employment trends:

1. The profession is no longer seen to be attractive
2. The employment of untrained staff to meet the shortfall in trained staff.
3. Unemployment of professional staff owing to the preference for untrained but cheaper “library assistants”.
4. The vacant positions in many provinces have affected the accessibility of libraries and information services in several ways. The lack of staff has meant cutting the opening hours and the range of services available to the public.

Sub-sector impact of the employment trends

1. Specialised LIS sectors failing to attract personnel
2. School libraries not run by librarians
3. Rural libraries are poorly staffed
4. Local government preference for hiring assistant librarians

Recommendations

Employment

1. Municipalities must employ qualified professionals in order to manage the libraries effectively.
2. Professional librarians must be employed for the management of school libraries.

Remuneration

1. DPSA should align the remuneration of the librarians with other professionals in public service. The entry level for library professionals must be the same as that for other professionals such as social workers.
2. Funding of library remuneration should be ring fenced to fill the vacancies.

Access, participation and disability

Overview

The consultative meetings agreed that libraries can no longer be satisfied with reaching and serving a minority of South Africans, and that we need to adopt bold policies and innovative practices to reach all people. They noted that in spite of great efforts the distribution of LIS still favours urban populations and previously advantaged groups and that users and potential users still experience a social and cultural distance as LIS are regarded as places for the literate elite. The built environment in many instances does not incorporate the spaces and facilities required by a modern service nor facilities for people with disabilities. Although ICTs are regarded as essential for the efficient functioning of LIS, many lack these basic facilities. The lack of suitable materials in the indigenous languages is a barrier to use.

Objectives

Barriers will be identified and removed. Librarians will adopt measures to ensure that all citizens are confident of being provided with materials and resources through all media and formats to meet their needs. All LIS will play a role in bridging the digital divide through availing ICTs and information literacy programmes to educate people in the effective use of all resources, thus rendering them independent learners. Principles of equity of access in all its dimensions - physical, intellectual, cultural and linguistic - will guide planning and delivery of transformed LIS.

Challenges

The following dimensions are identified and address the challenges of widening and deepening barrier free access:

1. Physical access
 - a. Location of libraries
 - b. Hours of opening
 - c. Design of buildings
2. Intellectual and Cultural access
 - a. Basic literacy
 - b. Information literacy
 - c. Multilingualism
3. Access for people with disabilities
4. ICTs

Physical access

1. Physical distance from LIS based on a legacy of spatial apartheid planning severely limits use.
2. The reduction of hours experienced by the public library sector as a consequence of insufficient funding and resultant staff shortages has had deleterious effects on people's ability to use the library.
3. Design of buildings based on inappropriate imported models that create cultural and social alienation which perpetuate exclusion.

Intellectual and Cultural access

1. Perceptions that LIS can offer little of value and relevance on account of fears that LIS are the exclusive domain of the literate and educated elite. Literacy figures are provided in Chapter 9. A national survey in 2005 found that only 26.7% of public libraries engage in adult education; the majority who do not are constrained by resources, human, financial and material (Nassimbeni and May 2006).
2. Low expectations by people who have had no prior experience or negative experiences of LIS.
3. People's reluctance to approach LIS for fear of the complexity of the organisation of LIS and of the information universe.

4. In a knowledge society, such as the one South Africa is striving towards, it is essential that all citizens not only have access to information, but also the skills to use it effectively. Information literacy education is the means whereby these skills can be acquired. The first baseline study of South African employers' expectations of graduates conducted by HESA found that graduates do not have the ability to find and use information (Govender 2007).
5. In 1994, a multilingual language policy was adopted giving official recognition to eleven languages whose recognition was guaranteed by the South African Constitution of 1996. In 2003, the South African Cabinet approved the *National Language Policy Framework* (NLPF) which aims to:
 - a. "promote the equitable use of the 11 official languages;
 - b. facilitate equitable access to government services, knowledge and information;
 - c. ensure redress for the previously marginalised official indigenous languages;
 - d. encourage the learning of other official indigenous languages in order to promote national unity, and linguistic and cultural diversity; and
 - e. promote good language management for efficient public service administration to meet client expectations and needs" (South Africa. Department of Arts and Culture, 2003a: 13).
- 6.
7. There is a need to develop an attitude of service which recognises and is responsive to the diversity of cultures and languages in different communities of users.

Access for people with disabilities

1. Research estimates that between 5% and 12% of South Africans live with moderate to severe disabilities, which include sight disability, hearing disability, physical disability, and other kinds. People with disabilities are excluded from the mainstream of society and experience difficulty in accessing fundamental human rights.
2. Disabled people's organisations across the world have therefore repositioned disability as a human rights issue. The social model has become the accepted approach to people with disabilities. The social model recognises that it is society itself that should accommodate people with disability rather than the other way round. This model requires substantial changes not only to the physical environment but to peoples' attitudes in order to ensure the right of people with disabilities to play a full, participatory role in society.

ICTs

The diffusion of ICTs, essential for socio-economic development, impacts on all spheres of individual and collective life. In this global digital age, those who are unable to access ICTs are increasingly disadvantaged as the world's dependence on them grows in all spheres of human activity. Warschauer points out "the ability to access, adapt and create new knowledge using information and communication technology is critical to social inclusion in today's era" (2003: 9). Most Western countries are pursuing policies to ensure equal opportunity for their citizens to access and use them effectively "in order to enable them to participate fully in the educational, social and economic activities and democratic processes, which make use of these technologies" (Cullen, 2001).

1. Libraries are being reshaped by the rapid spread of ICTs enabling them to create information hubs even in deep rural areas and to provide opportunities for previously marginalised communities to benefit from access to the new technologies.
2. Bertot et al (2008) point out that in the UK and USA, the public library is the only public point of access for Internet and computing services.
3. The burden on public agencies to provide access to the masses in South Africa is great as only 4,5 million people (or 10,5% of the population) are connected. This compares with the percentage in Africa of 5.3%, and the rest of the world of 24.7% (Africa Internet Usage and population Statistics).
4. Many South African public and school libraries are disadvantaged by slow provision of these technologies, which seriously hampers their ability to deliver quality services, and also to play a role in eliminating the digital divide.

Recommendations

Physical access

The distribution and location of libraries have a significant effect on the ability of people to use them, and the barrier of distance can be the single most important deterrent to use.

1. Good access requires well situated LIS buildings, good reading and study facilities, as well as relevant technologies and sufficient opening hours convenient to the users.
2. There are no internationally accepted standards that relate to distance of public libraries from their communities.
3. Account needs also to be taken of people unable to visit the library on account of incapacity, e.g. the aged, and those in hospital. This calls for outreach services to those unable to visit the library. The rights of those in prison must be guaranteed and affirmed by giving them access to library and information services.
4. Opening hours must be arranged in such a way that people are able to use LIS during their free time.
5. The design of the library building and arrangement of space should be in keeping with cultural needs and environmental conditions which will encourage people to enter the library and feel at home there.
6. The physical building must serve the needs of the community, be attractive, and designed for efficiency and sustainability, and reflect and promote the community's sense of civic identity. The notion of "*Universal design*" and "*Inclusive design*" should be implemented in this regards.
7. Children and youths have special needs which can be effectively met in a special section designed for them, with fittings, facilities and retrieval tools adapted to their needs.

Intellectual and Cultural access

1. The question of low membership and use can be addressed through broadening intellectual access through literacy and information literacy programmes.
2. In order for the public library to deliver on its mandate of providing services to all members of the community, it needs to reach those who feel excluded by designing and marketing targeted programmes that will clearly promote social inclusion.
3. The public library should exercise its role in development by joining the struggle against poverty through engagement with adult education, and literacy programmes.
4. The Information for All Programme (IFAP) of UNESCO has concluded that “there is a need to embed information literacy in the curriculum at primary, secondary and tertiary levels, as well as in the training for information professionals, including education and health care workers.”
5. It is the task of librarians to ensure that information literacy programmes are designed and delivered to all groups at their libraries who require the skills which are so essential a part of a modern democracy and necessary for social inclusion.

Multilingualism

All citizens have the right of access to information in the language they prefer, and this policy targets all government structures.

1. Government department LIS should provide access to official documents in all eleven official languages, or the regional languages where this is appropriate.
2. Books in mother tongue must be provided in order to promote the Language Policy and foster reading and in so doing both promote linguistic and cultural diversity and affirm language rights in a multilingual society.
3. LIS must guard against “the slide towards a unilingual public policy delivery” which Alexander finds distressingly evident in many spheres (2007).
4. Where possible, books by local authors with local content should be acquired so that readers may identify readily with the text. Care should be taken that texts in translation are relevant to readers’ experience and of a high linguistic standard.
5. Collections of materials in African languages should be attractively and prominently shelved and vigorously promoted so that communities become aware of their presence and are encouraged to use them.
6. Librarians should be encouraged to acquire conversational skills in the most used African language in their area so that clients are immediately made to feel welcome and the experience is an enjoyable one.

7. Community libraries play an important role in offering literacy education in English to assist clients to improve their English language skills which in turn can enhance their employment opportunities.
8. The LIS collection must contain materials, media and artefacts that meet the needs of the particular community being served, taking into account cultural and linguistic diversity and educational levels. Participants at the consultative workshops stressed the importance of sound collection development principles that are closely articulated with community needs and interests.

Access for people with disabilities

In South Africa, The Constitution and its Bill of Rights, the Promotion of Equality and Prevention of Unfair Discrimination Act, of 2000, the South African Library for the Blind Act of 1998, and the White Paper on an Integrated National Disability Strategy of 1997, are the main pieces of legislation that impact on the lives of people with disabilities. Moreover, South Africa has ratified the *United Nations Convention on the rights of persons with disabilities* and its *Optional protocol*. These official documents generally emphasise the right of access to information of people with disabilities. The Copyright Act, The Legal Deposit Act, and other laws, however, make no special provision for people with disabilities, and thus restrict access to information.

1. These laws need to be amended in order to make provision for people who may be blind or print-handicapped, dyslexic, and/or deaf. The provisions will have to deal with issues such as digital curation or the conversion to alternative formats in perpetuity so that there is no need for libraries to seek copyright permission whenever the format changes.
2. South African librarians should collaborate with colleagues abroad in order to respond effectively to copyright restrictions that confuse the modification of format, in order to make content accessible, with the modification of content itself.
3. At the more practical level, LIS services to people with disabilities should emphasise equality of access by integrating their service requirements into mainstream services wherever this is possible.
4. The Checklist of the IFLA Standing Committee of Libraries Serving Disadvantaged Persons is a useful tool for all types of libraries, and it aims to improve access to buildings, services, material, and programmes.
5. The special technology needs of people with disability are increasingly being met by advances in hardware and software. The take-up of these technologies is however sensitive to national needs, such as the indigenous language project of the South African Library for the Blind. Although South Africa compares favourably with the rest of the continent, there are still special challenges such as the low Braille literacy rate and others that should be addressed.

1. The sector should aim to overcome the fragmentation of services by poor connectivity and aim at the ideal of the “borderless library”, connected into an integrated system.
2. Consideration should be given to the role of ICT in the collection and preservation of indigenous knowledge.
3. A study by the HSRC (Tlabela et al 2007) mapping access to ICTs by South African citizens concluded that it is logical to locate ICT services in public libraries because of their wide distribution, and also because more libraries are providing remote access to their digital resources. The study recommends that the Universal Service Agency of South Africa consider working in partnership with public libraries to expand and exploit increased ICT and computer provision to increase the population’s access to information.
4. There should be an ICT infrastructure that promotes interaction and interoperability to facilitate bridging the digital divide.
5. Provision of access to the Internet should be integrated and coordinated with other Government initiatives such as the Thusong Centres project.
6. LIS should promote government initiatives, such as seamless provision of access to information.
7. Development and acquisition of ICTs in LIS should conform to government strategy on Free and Open Source Software (FOSS).
8. Librarians must keep abreast of Open Access initiatives in order to broaden their clients’ access to scholarly and educational information, e.g. the Department of Science and Technology’s investment in scholarly publication which flowed from one of the recommendations of the report on scholarly publishing by the Academy of Science in South Africa.
9. Forums should be established or existing ones strengthened in order to share information/expertise among librarians across the sector.
10. Wireless technology is an economic method of connecting both urban and rural areas.

A culture of reading

Overview

As institutions of reading, libraries contribute significantly to a culture of reading with an emphasis also on writing and learning. Although reading occurs both inside and outside of libraries, they play the leading role in building a nation of life-long readers. They supply not only books, but other reading materials such as newspapers, magazines, reports, and pamphlets. In addition to their educational and cultural roles, libraries contribute to economic development by improving productivity through a reading and functionally literate workforce. There are already several state and private literacy organisations, as well as public-private partnerships, that promote reading and that involve libraries in these partnerships. There are however challenges that need to be met in order to entrench a culture of reading.

The Department of Education’s Children and Youth Literacy Directorate is the best example of the state’s effort to promote a culture of reading that also expects the involvement libraries. The Directorate has already:

1. Developed and finalised a National Reading Strategy. The strategy, which is published on the government website, has been sent to schools across the country. The strategy expects that the Department of Education will cooperate with the Department of Arts and Culture to provide classroom libraries, and mobile libraries.
2. Developed a Teacher’s Toolkit, which will be available in all eleven official languages, to improve literacy in schools. The translation of the Toolkit is in progress.
3. Started to implement the 100 Storybooks Project that will ultimately provide three packs containing 100 Grade 1-3 storybooks, and steel bookshelves to create classroom libraries in primary schools in 14 poor school districts. Implementation is at an advanced stage.
4. Started to implement a ‘mobile library in education’ project that has already deployed 21 mobile library buses in four provinces in 2007, and plans to expand the service to the remaining five provinces in 2008. The Department of Trade and Industry will supply an additional 100 buses for the project.

5. Implemented the 'Drop everything and Read' campaign, which is a national reading awareness programme that will provide storybooks and a bag to Grade R and Grade 1 learners in schools across the country.
6. Become involved in the Ithuba Writing Project that is developing learning materials in all eleven official languages and that will be distributed to
 - a. 2000 primary schools across the country.

Examples of non-government and private Literacy and Reading organisations, and public-private partnerships include the projects of the READ Educational Trust, Rally to Read, Nedbank Readathon, Rotary International's 'Bury me in books', Biblionef, and the Bitou 10 Foundation. These and other initiatives include and reach beyond the school environment to address related issues such as adult illiteracy, Braille and tactile materials, and project evaluation.

Challenges

In spite of the work of these literacy organisations and reading projects, librarians face significant challenges in helping to entrench a culture of reading. These include the following:

1. Policy and infrastructural developments without the support required to embed them will hamper the growth of a reading culture. For example, the Education Laws Amendment Act of 2007 (that amends the South African Schools Act of 1996) laudably lists the availability of a library as a minimum uniform norm and standard for school infrastructure. There is also an attempt to develop the minimum norms and standards for the school library sub-sector. A strong commitment to these developments will contribute significantly to the establishment of a reading culture in schools. The *Progress in International Reading Literacy Study* (2006) showed that learners in countries that performed better than South African learners had access to high-quality classroom and central school libraries.
2. There is a high level of adult illiteracy and a low level of functional literacy. Based on the 1995 Household Survey and 1996 General Population Census, of about 26 million adults in South Africa (people aged 15 and over), about 12 to 13 million have less than a full (Grade 9) general education, 7,4 to 8,5 million have less than Grade 7, and about 2,9 to 4,2 million have no schooling at all, and are illiterate.
3. There is an unsatisfactory literacy environment in homes. *The National Survey into the Reading and Book Reading Behaviour of Adult South Africans* (2007) revealed that half of South African households have no books. There is also little articulation between homes, schools, and communities as sites of reading.
4. The majority of South Africans are infrequent readers and the usual reading materials are newspapers and magazines. A quarter of the population never read in their leisure time, with people in rural areas and older people featuring strongly in this group.
5. Some of the other factors that continue to prevent libraries from contributing to a reading culture include the poor supply of reading materials in indigenous languages, the impact of the mass media, the mismatch of content and reader needs, budget cuts, tax on books, library closures, and the issue of unfunded and under-funded mandates

A more general challenge is to improve an understanding by librarians, educators, and policy makers of the popular uses of literacy, and of other reading formations linked to religious institutions, bookshops, book clubs, and trade unions. The tendency is to ask why people do not read rather than to ask what forms of reading do actually occur.

A mistaken assumption about reading patterns in South Africa, for example, is that there is little serious reading in African languages. And yet within the religious domain many believers read deeply and passionately in African languages, adopting a style of intensive reading that has largely disappeared in a world of extensive and often superficial reading. In order to understand how a reading culture works, there is a challenge to uncover this diversity of reading practices, which will supplement the empirical work already produced.

Librarians and libraries should contribute to a reading culture in the following ways:

1. In a focus on family, reach out to parents and children to improve reading activities of all family members in homes.
2. Reach out to teachers and learners and, with a group focus, to improve voluntary and curriculum reading activities in classrooms, and encourage teaching methods that involve reading.
3. Increase involvement in those community reading activities which occur outside of libraries and which may be linked to literacy organisations, trade unions, and churches.
4. Make libraries places of reading and writing. Both skills are required to develop literacy and a culture of reading.
5. Support and participate in international events such as World Book Day, International Literacy Day, and Book Fairs, and national events such as Wordfest and other cultural and literary festivals.
6. Get involved in national and local literacy events such as Readathons, and projects of the Children and Youth Literacy Directorate.
7. Promote the reading and writing of books in mother tongue languages, and purchase these materials through special catalogues. Librarians can lead the development and promotion of children's and youth literature in all South African languages.
8. Encourage and assist community library mother tongue reading and writing clubs, following the successful examples and the projects of PRAESA and the Centre for the Book. Librarians should themselves get involved in reading circles, book clubs, and journal clubs.
9. Provide opportunities for children's librarians to acquire storytelling and other reading promotion skills.

Safeguarding, Preservation and Protection of Library and Information Services materials

Overview

The Transformation Charter affirms the preservation of information resources as central to libraries and librarianship. It notes that the manufacturers, publishers, and purchasers of information media must address the usability, durability, longevity and the preservation issues associated with information resources published and disseminated in both electronic and traditional formats. These issues include the permanence of the medium itself, its intelligibility and readability over time, the threat to information posed by technical obsolescence, the long-term retention of information resident in commercial databases, and the security of library and commercial databases.

The Transformation Charter underlines the need for library professionals' to work closely with standards-setting organisations to identify and develop needed preservation standards and to promote compliance with those that exist. The Transformation charter further affirms that while preservation guidelines and standards emanating from the provinces and local government and other information institutions are helpful, they should be seen as a prelude to official national and international standards. An official national standard developed through consensus of all parties, including commercial concerns, has a greater chance of implementation than a guideline or standard developed and promulgated solely by a professional association.

The preservation concerns should not be limited to the information resident in books printed on paper, but should include information products such as sound recordings, photographs, videotapes, and CD-ROM, as well as the transfer of machine-readable data to either human-readable copy or to the National Library which will ensure continued access to the information.

Objectives

1. To highlight the responsibilities of the LIS profession for the preservation of materials of all types in order to guarantee access to the information they contain, both for the current generation of library users and for generations to come.
2. The preservation and protection provisions aim to ensure that every individual has timely access to information and in a format the individual can use. These policies address national information services and responsibilities, government legislative policy, and the services and responsibilities of libraries.

Challenges

1. The useful life of library materials is affected by the longevity, stability, and durability of information media such as paper, film, and optical disks. The standards for publication of information, whether paper-based or machine-readable, affect continued access to that information.
2. In relation to access to information the preservation of library resources is essential in order to protect the public's right to the free flow of information as embodied in the Access to Information Act of South Africa. Impermanence of primary source documents threatens our ability to preserve local and family history. Libraries around the country collect materials from individuals, local governments, and private and public institutions that document cultural and social history. Typically, much of this material is intended as a record of current events rather than as permanent documentation. Although citizens may know about the impermanent nature of newsprint, they are less likely to be aware of the highly impermanent nature of media such as color photographs and videotape, even though these media ultimately constitute important primary resource documents. This is an issue of enormous public concern, and libraries have an obligation to inform their users, administrators, and local officials about the ephemeral nature of these materials and to recommend more permanent documentation techniques.
3. There has been little government leadership in developing a more expansive and inclusive national preservation policy in terms of both programs and funding. There is no policy that links the efforts of national, provincial, and local libraries in a process for preserving materials that document our cultural heritage and for making their content widely available to all citizens. Education provision in the science of preservation is a challenge as higher education providers have not mainstreamed preservation of all mediums in their curriculum. Self-published authors have the challenge of being exposed to the publication standards in order to provide for preservation of their resources.

Recommendations

1. To ensure the continued availability of library materials to present and future generations of library users, the Charter recommends that all libraries and library professionals should initiate and support preservation efforts at all levels. These efforts should include supporting research into the causes of deterioration; communicating the need for increased funding for the preservation of endangered materials to appropriate organizations and national, provincial and local governments;
2. Educating current and future librarians, library users, and the public about preservation issues;
3. Promoting the use of permanent and durable media by the publishers of information products.
4. Libraries should be encouraged to exercise the responsibility to provide for the preservation of their collections including the following basic preservation activities:
 - a. appropriate and non-damaging storage conditions,
 - b. remedial treatment to keep materials usable for as long as they are needed,
 - c. preservation of materials in their original format when appropriate, and
 - d. replacement or reformatting of deteriorated materials.
5. Preservation issues should be addressed during the planning for new buildings and additions to and renovations of existing buildings.
6. In addition to already established activities for preserving paper and books, preservation strategies should be extended to new and emerging technologies, including the updating and reformatting of magnetic media to allow continued access and protecting against viruses, worms, and unauthorized alteration of data and information in electronic media.
7. The Charter takes the position that publishers and manufacturers have an obligation and a responsibility to libraries and to the public for the appropriate performance of information media for use by library patrons, in terms of their usability, durability, and longevity.
8. LIASA is tasked to engage in active education and public relations efforts, and to establish and promote links with trade associations, publishers, and publishing associations to develop, promote, and publicize standards for the permanence and durability of information media. Concerning the permanence of information products printed on paper, LIASA together with government should set standards for the permanence and durability of information media to accord with the International Standards Organization (ISO).
9. NCLIS in collaboration with LIASA will actively participate in the development of appropriate standards and promote their use by the manufacturers of information media, the publishers of information products, and the library community.
10. LIASA is to work with electronic publishers to develop guidelines governing the preservation of data, so that information will not be lost when publishers can no longer economically retain and disseminate it.
11. Cultural institutions such as libraries should develop capacity to guarantee the security and integrity of their own computer systems, while ensuring legitimate access to them.
12. The government through policy and by the efforts of its historical, cultural, and information institutions, should affirm the responsibility of all cultural institutions, including local and state libraries, to preserve and provide access to historical documents. Incentives are also needed to encourage private institutions to participate in the national effort.
13. Increased funding is urgently needed to ensure a balance of preservation activity nationwide and future access to historic materials by a broad spectrum of people.
14. Attention to the longevity, stability, and durability of information media is also critical for materials published by the government in microform, in electronic format, and in other emerging technologies.
15. The application of digital technologies for the preservation of library materials is highly commended. However, care must be taken not to destroy the originals which should be preserved and stored away safely for future use.
16. National norms and standards for digitization as a method of preservation of all heritage materials should be established as soon as possible.

Framework for the determination of minimum national norms and standards

Overview

The framework for the determination of the minimum national norms and standards for the re-imagining of the library and information services as memory institutions will be anchored on the minimum norms and standards as set out in the National Constitution of 1996, Section 195 (1), the White Paper for Arts and Culture, the government policy of Batho Pele and benchmarked internationally against the guidelines provided by the IFLA, UNESCO and the international standards organizations.

The Constitution states that national government is required to establish national legislation, where it is necessary, to establish a minimum national standard. No such legislation for the library and information services sector exists in South Africa. Norms and standards, once set, will act as a benchmark for determining whether LIS levels of service are meeting the set standards and legislative imperatives.

The South African Constitution

Section 195 (1) of the Constitution of South Africa (Act no. 108 of 1996) stipulates that public administration must be governed by democratic values and principle, including the following:

1. A high standard of professional ethics must be promoted and maintained.
2. Efficient, economic and effective use of resources must be promoted.
3. Public administration must be developed and oriented.
4. Services must be provided impartially and equitably.
5. People's needs must be responded to and the public must be encouraged to participate in policy making.
6. Public administration must be accountable.

7. Transparency must be fostered by providing the public with timely, accessible and accurate information.
8. Good human resource management and career development practices, in order to maximize human potential, must be cultivated.
9. Public administration must be broadly representative of the South African people, with employment and personnel management practices based on ability, objectivity, fairness and the need to redress the imbalances of the past to achieve broad representation.

The above constitutional principles help in guiding the transformation of public services such as libraries to provide appropriate services to all the people of the country.

Batho Pele Principles

The second pillar of a framework to determine the national minimum norms and standards relates to the implementation of government policy on public service delivery. The South African government realised that most of the customers were dissatisfied with the services they received from public sectors, so it came up with the initiative of “Batho Pele Principles”. Batho Pele is a Sesotho phrase meaning: “putting people first”. The government stipulated that service delivery must be transformed, in order to create satisfied customers. Departmental libraries form part of the public sectors that must transform service delivery through the application of the Batho Pele principles. Thus, departmental libraries are expected to provide staff with information that specifically addresses their immediate needs, which may in turn contribute to the development of social well-being and economic stability of the country. The Batho Pele principles commit public sectors to serve all customers effectively and efficiently, and the Constitution of the Republic supports this by saying that “everyone has the right of access to information (Section 32 (1)) and the right to use his/her language” (Section 30).

The eight Batho Pele principles should thus become a foundation for the norms and standards guiding service delivery in the country. The principles include:

- Consultation;
- Service Standards;
- Access;
- Courtesy;
- Information;
- Openness and Transparency;
- Redress; and
- Value for Money”.

The implementation of these principles in the library and information service sector will be laying an important foundation for service provision.

Objectives of the norms and standards framework

The intended objectives and outcomes of national norms and standards are to achieve a minimum, equitable, acceptable and uniform level of library and information services across the country whereby:¹⁰

1. The quality of service is of an acceptably high standard;
2. LIS sector is staffed by enough trained and well-qualified personnel;
3. There are enough books and other information materials to meet the various needs of the communities being served;
4. LIS infrastructure is suitable and has sufficient basic facilities to make it safe and comfortable to use;
5. LIS facilities are appropriately located and designed to make them easily accessible for all sections of the community;
6. Information communication technology is made an integral part of the library and information services;
7. Relevant materials in the indigenous languages of the areas being served are available and accessible;
8. LIS should also provide access to materials that are on the periphery of libraries’ core activities (i.e. information on careers, health, business, government, literacy programmes and community involvement);
9. LIS facilities are open long enough at times that allow the community to effectively utilize their services.

¹⁰ KPMG Report on Public Libraries: Phase iii Norms and Standards

Challenges in setting the Norms and Values

Owing to the lack of national and uniform norms and standards, the LIS sector in South Africa has found itself confronted by various challenges, which include the following:¹¹

1. A lack, or inconsistent level, of service across sectors.
2. Too few staff, or staff who are too ill-equipped, to meet communities' growing and changing needs.
3. Too few books and too little of other types of information materials in stock.
4. Inadequate and inaccessible infrastructure and maintenance of infrastructure (i.e. old, dilapidated, small or adapted buildings with no security systems for either library resources or for the public and the staff).
5. Lack of, or inadequate, information communication technology.
6. Lack of material in indigenous languages, even of the very communities that libraries serve.
7. Failure to adapt to new community needs (i.e. for information on careers, health, business, government, literacy programmes, community involvement, etc).
8. Unsuitable opening hours that do not allow libraries to be accessible to diverse members of the public at times they can effectively utilise them.
9. Inadequate funding to enable the library information services to respond to changing community needs.
10. Lack of responsibility for the establishment of norms and standards.
11. Failure to provide uniform norms and standards for people with disabilities.

Given that the LIS function is a provincial competence, it is the provinces' responsibility to pass legislation and establish their own specific norms and standards to address the unique problems found in their regions. The reality is that of the nine provinces only three have legislation in place governing the provision of library and information services, and, generally, legislation is the precursor of norms and standards. Therefore, it follows that most provinces have not addressed the inequities that are apparent in their library and information services sectors seriously enough.¹²

11 KPMG Report on Public Libraries: Phase iii Norms and Standards

12 KPMG Report on Public Libraries: Phase iii Norms and Standards

Recommendations

1. Respective government levels need to develop policies and guidelines relating to the operations of public libraries as they will help the public to understand in principle what they are entitled to do or obtain from libraries and what they cannot do or obtain (rights and obligations). These guidelines should also define what is expected of librarians in respect of the services they are expected to deliver.
2. A progressively incremental and flexible approach to the setting of the national standard will be necessary because of the various backlogs and other dynamics prevailing in different provinces,
3. The National Council for Library and Information Services (NCLIS) should be tasked with the oversight to maintain a watching brief over national and international standards activities to ensure that the appropriate standards framework is in place or under development to support its business objectives.
4. NCLIS should publish information about its standards activities through its web page and also maintains a page that provides links to lists of standards and standard organisations.
5. Responsibility for ensuring that the LIS norms and standards activities operate within an overall standards framework is shared as follows:
6. NCLIS working through LIASA should establish the following groups to advance the quest for norms and standards:
 - a. Library Standards Activities Group: priorities setting and allocation of resources to standards-based activities;
 - b. Information Technology Division: maintenance and development of the "Standards for Libraries" web site;
 - c. Resource Sharing Division: provision of expert advice to the Library sector on system interconnection standards and related application protocols.
7. The Department of Education should set the norms and standards for all universities and FET colleges in order to level the playing field.
8. Special attention should be paid to setting norms and standards in all areas affecting people with disabilities to ensure the enforcement of the Constitutional requirements, the promotion of equality and the prevention of unfair discrimination Act, of 2000, the South African Library for the Blind Act of 1998 and the White Paper on an Integrated National Disability Strategy of 1997.
9. The list of the norms and standards is not exhaustive and it is recommended that their development be done in phases beginning with an agreement on the minimum progressing to the more complex later.

1. Catalogue descriptions
2. Data used in library systems
3. Development of Library Networks
4. People with disabilities
5. Preservation standards
6. Professionalization of the Librarianship
7. Infrastructure and furniture
8. User Services
9. Access
10. Library Material and Equipment
11. Monitoring and Evaluation

Implementation, monitoring and evaluation of the Transformation Charter

Overview

The NCLIS is best placed to manage the process of implementation, monitoring and evaluation. To ensure that the objectives of the Transformation Charter are met, it will be critical that NC-LIS, in consultation with LIASA and the appropriate stakeholders, plans the implementation and develops the necessary instrument for monitoring and that evaluations are done on a regular basis in consultation with LIASA.

It will be important that this process of developing the Transformation Charter of LIS generates high level transformation indicators which can be monitored and evaluated. The Transformation Charter performance indicators should focus on the inputs, processes and outputs.

New requirements of reporting by public entities should include report backs on the Transformation Charter indicators.

Once the norms and standards for LIS are developed they will become the national benchmarks on which all institutions will benchmark themselves. The norms and standards will then be used to track and monitor performance of the entire sector.

The collection and publication of the data from the process of monitoring and evaluation will assist in measuring performance and progress over time, will compare it with equivalent libraries, and plan for improvement.

TIMEFRAME:
Short Term = 1-3 years

Medium term = 3-5 years

Long term = 5 years or longer

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
1. Develop Library and Information Services transformation plan	Lack of LIS transformation plan	Align the Plan with National legislative imperatives	Mobilise and network all government institutions.	LIS implementation plan completed	NCLIS	Short-term
2. Governance of Sector	Overlapping of roles and responsibilities of the various tiers and departments of government. Schedule 5 (a) is problematic	Legislation to clarify the mandates	Draft legislation	Legislation signed into law	DAC and provinces	Short term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
3. Norms and standards	Lack of national norms and standards for the LIS	Legislate norms and standards for LIS	Develop legislation on norms and standards for LIS	Legislation on norms and standards passed by national and provincial parliaments	DAC and DoE in consultation with LIASA	Short term
4. School Libraries policy framework	Lack of school library policy framework	DAC and DoE to develop legislation on school libraries	Finalise and legislate policy for school libraries	Legislation on school libraries	DoE	Short term
5. Integrated funding Model for the LIS	Limited funding of public libraries by DAC until recent introduction of conditional grant	Legislative changes that provide for funding from National DAC to be folded into the provincial equitable share allocation that is LIS specific on a province by province basis	New funding Model	New funding model in place	DAC	Short term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
6. Easy Access to library and information services by all citizens	Distribution of Library and information services is skewed along the apartheid legacy	Access to LIS in a knowledge economy be prioritised in National allocation of resources	9 more libraries built at the provincial level	9 new library and information services facilities at provincial level	DAC, DoE and LIASA	Short-term
7. Free Access to Library and information services	Access to LIS facilities is not always free and this is a major constraint	Legislate to make it a right for citizens to use LIS facilities for free	Develop and implement National policy framework on free access to LIS	National Policy Framework document and implementation	DAC and DoE	Medium term
8. Remuneration of the LIS sector	Disparity in salary scales and salaries commensurate with comparable qualifications in other sectors	Remuneration policies that level the playing field	Government to align remuneration of librarians with at all tiers of government.	Remuneration of LIS aligned with others	DAC	Medium term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
9. Collections Development	Developmental needs and the use of indigenous languages are not catered for	Language policies need to be supported and enforced	Guidelines developed	Monitoring the change in collections development	LIASA, DAC and DoE	Medium term
10. Borderless libraries	Administrative barriers to recognition and governance of library networks to connect publicly funded libraries	To develop legislation to regulate, access and govern networks for publicly funded libraries	Pass legislation	Legislation passed	DAC and DoE	Short term
11. Integration of libraries and information services into communities	Lack of policies and strategies to integrate libraries into communities perpetuates inequalities	Policy review	Development of policies and strategies for the integration of LIS into communities.	Policies and strategy documents completed	NCLIS and DAC	Long term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
12. Recognition of role of LIS in education.	The perception that LIS are the preserve of the literate and the educated elite.	LIS policies should emphasise their educational role	Public awareness strategy to promote use of libraries	Launch of public awareness campaign	LIS	Short term
13. Information and communications technology	The digital divide	Government policies on e-education, government	Strategy to position LIS as at the core of government e-strategy	50% of all LIS facilities are connected to ICT	All	Long term
14. Culture of Reading	Low culture of reading and writing	Align with strategies on reduction of poverty and illiteracy	Strategy to place libraries at the core of fighting illiteracy through promotion culture of reading	Number of LIS involved in Literacy campaigns	NCLIS, all	Short term
15. Procurement of LIS resources	Lack of a fair and just procurement model	Align procurement of LIS with government policies	Develop a procurement model based on best practices	Standardised and Best practices model developed	NCLIS, DAC and publishers, book sellers	Short term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
16. Safeguarding, preservation and protection of LIS materials,	Comprehensive national norms and standards for preservation, etc do not exist	Developed measures for safeguarding, preservation and protection of LIS resources	Develop an integrated norms and standards for preservation	Developed national framework on preservation	NCLIS, provinces	Long Term
17. Develop a monitoring and evaluation model	The sector has no instrument for monitoring transformation	There are no statutory obligations for transformation of the sector	Develop a LIS transformation barometer for tacking change	Transformations instrument/ barometer implemented	NCLIS	Short term
18. Professionalisation of the status of the LIS practitioners	The low status accorded to LIS practitioners in the country	There is no statutory body to professionalise the status of LIS practitioners	LIASA should be legislated as a statutory body to professionalise the status of LIS practitioners	Legislation passed	DAC & DoE	Short term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
19. Education and Training of LIS practitioners	Curriculum responsive to transformed LIS. Shortages of qualified professionals and new entrants to the profession. Imminent closure of Library schools and formal programmes. Skills development opportunities for those already in employment.	Review of formal LIS education and training, and its funding. Systematic approach by employers to continuing education and development reflected in their institutions' HR Policy	The profession adopts a strategy to engage with universities that have unilaterally decided to close library schools, and scarce training programmes. Lobby DoE to classify LIS in the appropriate Funding Group so that formal training programmes are adequately funded. Provision and funding of suitable programmes of continuing education and professional development for those in employment	More candidates enrolled in formal education and training programmes at the universities. Universities consider submissions from the profession with respect to arbitrary decisions to close library schools and training programmes. CESH category in Funding Group for LIS revised upwards to reflect realistic costs thus providing an incentive for universities to keep their departments open and to continue their training programmes. More librarians taking up opportunities for skills development and training. Improved service delivery and evidence of heightened staff morale and commitment across the sector	NCLIS, LIASA, CHE, DoE & Universities	Short term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Timeframe
20. To strengthen democracy and citizenship	The lack of critical citizenry	There are no enabling policies and strategies for critical citizenry	To develop policies and strategies for literacy campaign for critical reading and public debate using LIS facilities	Increased number of literacy campaigns for critical reading and debate using the LIS facilities	All	Medium

Appendix I

The Call for Action: Key Issues and Recommendations.

1. Methodology

- a) When the National Council for Library and Information Services, in consultation with the Department of Arts and Culture, formed the Technical Team and Reference Group to draft the Charter, some people responded, “Why do we need a Transformation Charter?” So we asked people and organizations to tell us: political leaders, government officials, policy experts, scholars and practitioners, community and civil society organizations, and users of Library and Information Services.
- b) The story that has unfolded is a complex one, for many of the issues impact on one another and cannot sensibly be addressed in isolation. The story takes this form:
1. First, beginning with an overview on how the challenges look like from a variety of perspectives, we reflect on how the Sector can be transformed such that it is accessible and beneficial to everybody.
 2. Second, we look at the central issue on how to ensure that impediments to universal access and participation can be removed.
 3. Third, we consider the relationship between National, Provincial and Local Government Departments, and how their respective mandates can be more clearly defined to avoid overlap and confusion.
 4. Fourth, we provide a framework for the determination of national norms and standards which will help take the Sector on a decisive and measurable transformation path.
 5. Fifth, in each of these areas we make specific recommendation based on evidence and testimonies from a range of stakeholders. These recommendations are spelled out in greater details in the final chapter on Implementation, Monitoring and Evaluation.

2. Challenges and Recommendations

a. National Norms and Standards

At the core of the transformation challenges is the lack of national policy on norms and standards. Given the time at our disposal, we could only develop a conceptual framework for the determination of norms and standards, with a recommendation that a separate process be initiated to complete the task as a matter of urgency.

b. Governance

Key to the governance challenges is overlapping mandates and the lack of capacity to transform the Sector in line with the Bill of Rights and applicable nation policies. The following things should be done:

1. Legislation has to be reviewed to eliminate overlaps and confusion at the point of implementation.
2. Measures must be taken to ensure that good information is easily accessible to all who need it. This is important for greater transparency in the management of the Sector. Government must put pressure on all its officials to be more transparent in their activities and to adhere to professional codes and standards of service.

c. Education and Training, Investing in People.

1. The future of the Sector lies in its human resources, Indeed, the Sector must solve its training, recruitment and retention crisis if it is to contribute to national development and the Millennium Development Goals. For it to solve the crisis Government must make sure that Library and Information Science is offered at a number of tertiary institutions.
2. An undertaking must be made to equip and motivate the staff for their work. This must include ensuring that their conditions of service and remuneration packages are *at par* with those of equivalent professionals
3. Appointment processes must be monitored to ensure that only skilled candidates are selected.
4. The Library and Information Science curriculum should provide relevant skills for contemporary national needs.
5. In all educational institutions, Library and Information Services must be regarded as part of core business and not support structure, as it is currently the case.

d. Protecting the Most Vulnerable: People with Disabilities

1. Government should enforce the United Nations Convention on the Rights of Persons with Disabilities in terms of which the Sector should develop a rights and inclusion framework.
2. Government should provide direct budgetary support to the Sector for people with disabilities.
3. Special facilities for children and youth must be provided.

e. Access and Participation

1. As part of a wider set of measures to achieve equality and justice, the Sector must ensure easy and free access for all to Library and Information Services. In this regard, heightened attention must be given to the particular needs of people with disabilities.

f. Culture of Reading and the Transformation of National Culture

To develop a culture of reading, the following steps should be considered:

1. Free and easy access for all to Library and Information Services,
2. Enforce free and compulsory schooling up to undergraduate level,
3. Mobilize TV and other forms of mass media in the campaign to resocialise all South Africans, especially children and the youth, within the framework of values provided by the Constitution and the White Paper on Batho Pele.

g. How to Ensure Effective Implementation

1. If the Sector is to take responsibility for its own development, as it should, the Library and Information Association of South Africa and the National Council for Library and Information Services must be given greater influence in decision-making which affects it directly.
2. Adequate funding must be provided.
3. An independent monitoring and evaluation system must be established to make sure this happens.

Appendix II

Questions for Library and Information Transformation Charter public consultations

1. How many school and community libraries are available where you live, and how accessible are they to all those who need to use them? What can be done to ensure that there is equal access to Library and Information resources throughout the country? (Indicate whether you live in a suburb, a village, a township or any other location).
2. In your view, do the Library and Information resources and services where you live serve all the needs of the community? For instance, do they serve the needs elementary school children, secondary and high school students, university students and adult learners?
3. Is there a system where you live that ensures that Libraries serve the various needs of the community? If not, how can such a system be developed?
4. There is a general concern about the lack of suitably qualified Librarians. What should be done to train, recruit and retain such personnel?
5. Libraries in most communities are seldom integrated into the culture and experience, of the people. What can be done to facilitate such integration?
6. Concern is often raised about coordination in the management of Library and Information resources and about confusion and conflicting mandates. Where exactly does such confusion manifest itself and how can it be eliminated?
7. In which concrete ways can Libraries and Information Services contribute to the achievement of the following national objectives: eradication of illiteracy and poverty; social cohesion and nation building; human resources and development and skills training; xenophobia and regional integration in the context of SADC, for instance?
8. What should be done in the very process of developing the Charter to ensure that its recommendations will be supported by government, civil society and the private sector? And there lessons that can be used from other policy processes in the last fourteen years?
9. Apart from community, school and university libraries, are there alternative library forms that could be used to provide complementary or specialized services? Substantiate your answer with concrete examples.
10. Libraries and information services like other social institutions still retain large segments of the apartheid institutional culture, such as heavy bureaucracy and discriminatory treatment of sections of the general public. In your considered view, how can such institutional cultures and mindsets be eliminated? How can practitioners, bureaucrats and users be resocialised?

11. What precisely should government, the private sector and civil society do to assist the poor to mobilize themselves such that they can assert their right to information? Are there practices from our own past and from other communities that we can learn from?
12. How can we turn libraries into repositories for indigenous knowledge systems, research, documentation and practical purposes?
13. What do you consider to be the necessary information system technology (IT) support for the libraries?
14. Think about the needed equipment, the cyber infrastructure (connectivity) and the human capital skills needed

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