



Reg. No.: 140-828-NPO

COMMITTEE OF HIGHER EDUCATION LIBRARIES OF SOUTH AFRICA

ANNUAL REPORT 2017

**REPORT TABLED AT THE AGM ON 2 MAY 2018 AT
THE CITY LODGE HOTEL, KEMPTON PARK, JOHANNESBURG**

Report compiled by Chairperson LE Webster with the input from Exco members as follows:

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1 Strategic Purpose

CHELSA aims to improve library and information services for public higher education and research in South Africa through adopting the following vision and mission:

Mission

CHELSA strives through visionary and visible transformational leadership to ensure that the Higher Education sector is provided with optimal access to information for the purpose of learning, teaching, research and community development.

CHELSA will support knowledge management practices in academic and research libraries.

Objectives

CHELSA is a non-profit organization established for the following public benefit objectives:

- To promote the role of libraries in Higher Education
- To foster academic and research librarianship through partnership
- To develop information access policies for Higher Education libraries
- To enhance the use of technology within the Higher Education library environment
- To develop an active quality assurance programme for Higher Education libraries
- To establish human resources development programmes
- To transform the Higher Education Library and Information Services in terms of their fitness for purpose in a new era
- To ensure that all Higher Education libraries participate and contribute to community based services.

2 Membership

We welcomed the following new members to the Committee during the period 2017/18:

- Dr Shirlene Neerpath: Director Library Services; University of the Western Cape (UWC)
- Ms Sarah Kibirige: Director Library Services; Sefako Makgatho Health Sciences University (SMU).
- Ms Zanele Mathe: Director Library Services; University of Mpumalanga.
- Professor Daisy Selematsela: Executive Director of Library and Information Services; University of South Africa (UNISA)
- Ms Nomawethu Danster: Executive Director of Library and Information Services; University of Limpopo
- Professor Maria Frahm-Arp: Executive Director of Library and Information Centre; University of Johannesburg
- Dr Connie Bitso: Director Library Services; University of Fort Hare

Movements, resignations and retirements

- Ms Pateka Ntshuntshe-Matshaya was appointed as the Senior Director at the Walter Sisulu University. She was the previous Director at University of Western Cape.

We bade farewell to:

- Ms Lindiwe Nadaki: Senior Director; Mangosuthu University of Technology who retired in 2017.
- Dr Rookya Bawa: Executive Director Library Services, University of Johannesburg. who resigned early in 2017.
- Ms Gwenda Thomas: Executive Director: University of Cape Town. Ms Thomas resigned at the end of April 2018 to take up the post of Director of Scholarly Services (University Librarian) at the University of Melbourne Australia. We wish her well in this new post.

Achievements

- Congratulations to Professor Rocky Ralebipi-Simela on being elected to the OCLC EMEA Executive Council.

3 Appointment of a Project Manager for CHELSA

The Executive Committee commissioned Ms Glynis Prosser from The Process Works to compile a profile and terms and conditions for the project manager of CHELSA. The post was advertised via LIASA and CHELSA websites, Careers24, PNet and Career Junction with a closing date of 10 November 2017 with coordination by the University of Witwatersrand Library, who assisted members of the Executive with the selection under the Chair-elect as chairperson.

The successful candidate, Ms Anke McCallum joins CHELSA as the Project Manager with effect from 1 May 2018 on a part-time basis on a one-year fixed term contract.

4 Overview of the Year

The higher education landscape in South Africa proved to be relatively calm compared to the previous two years when the #FeesMustFall campaign led to violent unrests that resulted in the closure of some institutions for prolonged periods. The ramifications of the announcement of fee-free higher education in December 2017 by former President Zuma are being felt and managed differently by individual institutions. The impact hereof on academic libraries could well relate to financial support for resources, facilities and staffing.

The Committee of Higher Education Libraries of South Africa (CHELSA) is recognised as the body representing higher education libraries and as such were consulted by various forums on issues pertaining to the sector. In the early part of the year Professor Nkondo, the Chair of the Library and Information Services (LIS) Policy Development Project, approached CHELSA. The Policy Development Project was spearheaded by the National Library and the National Council for Library and Information Services (NCLIS). Below is a summary of some of the issues that CHELSA gave responses to:

4.1 Library and Information Services Statutory status

The lack of statutory status for the profession was raised during the LIS policy development meetings and workshops and all sectors of the LIS were invited to respond. CHELSA members were invited to provide their opinion on this matter during the scheduled CHELSA Ordinary meeting in October 2017. The following extract was submitted to the Chair of the LIS Policy deliberations:

- *The Committee of Higher Education Libraries of South Africa (CHELSA) at its meeting of 02 October 2017 unanimously agreed that the current format of the National Council of Library and Information services (NCLIS) as an advisory body to the Ministers of Arts and Culture and Education is not achieving what the profession requires.*
- *The committee is of the view that the Act No. 6 of 2001: National Council for Library and Information Services Act, 2001, should be revised and updated. Further that the Act should provide advisory as well as regulatory powers to the NCLIS so that it can function as the statutory body for the profession.*

4.2 Funding of information resources for academic libraries.

CHELSA was approached by the LIS National Policy Technical Team to comment on the proposal that 6% of each university's subsidy should be earmarked for information resources. The idea that academic libraries should receive a fixed percentage of the subsidy of the university was first proposed by John Willemse in 2002 in his book *Library funding: adequate financial support for African university funding*. A more recent publication by Stilwell and Hoskins on *Library funding and journal cancellations in South African university libraries published in 2011*, supported his view.

In order to canvas the opinion of CHELSA members on this issue, the matter was put on the agenda of the October 2017 Ordinary meeting. It was discussed at length during the meeting but members could not reach consensus on what to recommend to the LIS Technical Team. The committee mandated the Chair and Ms Gwenda Thomas to produce a position paper stating CHELSA's view.

The following is an excerpt from the paper that was presented to the Technical team:

- *The availability and accessibility of information resources are linked to associated price escalations which is a major challenge affecting academic libraries worldwide. In South Africa, the situation is compounded by a renewed and intensified period of financial stringency as universities cut back on their operating costs, in part caused by student unrest and resistance to fee increases as well as the poor performance of the South African currency against international currencies.*
- *The collection budgets of many university libraries have failed to keep up with the demands of the academic information marketplace. The pressure on the library budget in recent years has been due to amongst others, new legislative changes (14% value-added tax on electronic material in 2014) as well as the turbulent exchange rates that affect library budgets as most of the subscriptions are foreign based.*
- *The mounting costs of acquiring the resources necessary to support teaching, learning and research has far outstripped annual increases in library acquisition budgets. University Library Services receive an annual budget from the university to cover the costs of operations, staffing and collections, the last two forming the larger part of expenditure.*
- *Annual increases for access to electronic resources are a challenge, double-digit inflation has become the norm in the online database industry. Research indicates that the price of scholarly journals has increased at 10% per annum for the last three decades. This is particularly evident in the scientific, technical and medical (STM) journals. The budget received by the library does not cater for higher than average annual inflation and libraries are unable to inflation-proof the collections in the face of growing digital collections and significant price increases.*
- *Some institutions are able provide to libraries with a small percentage increase for inflation allocated to the collections budget for each new financial year and allow for an appeal if additional financial assistance is required. Unfortunately, often these increases fail to reflect the higher inflation rates for databases, journals and texts. As a result, the library is unable to maintain its purchasing power, and suffer a substantial year-on-year cut in its budget in real terms.*

CHELSA recommendations:

- *CHELSA members do not support a fixed percentage being allocated to the academic library in an institution – the current 6% being quoted is dated and not grounded on any recent audited data.*
- *The notion of the institutional revenue fund must be carefully unpacked and defined as this differs across the institutions.*

- *Any such funding allocation should be only for information resources and not library operating budgets*
- *The recommendation to the DAC and Education Ministers should be a strong recommendation for an extensive investigation that takes into account correct terminology and audited data – this should be a task team which includes university finance experts who have understanding of both institutional finances/budget structures and library accounts as well as one or two library directors who also understand the issues and can advise. The task team should take into consideration issues like domain and institutional requirements.*
- *There should be some form of model that takes into account the types of collections required to support the teaching, learning and research requirements of the institutions. In addition, a portfolio of core databases to which every institution should have access must be identified and reflected in the funding model.*

Following the submission to the Technical Team, CHELSA was once again requested to attend a meeting arranged by the Technical team at the National Library. The Chair was unable to attend due to a prior engagement and Dr Moyo, the secretary for CHELSA, volunteered to represent the organization. The meeting was chaired by Professor Nkondo and the CEO of Universities South Africa (USAf), Dr Bawa, was amongst those who attended. An invitation had been extended to the Department of Higher Education and Training (DHET). The following is a short report by Dr Moyo:

- *The main objective of the meeting was to inform policy about how best university libraries could be funded. A brief overview was given by the LIS National Policy Technical Team relating to CHELSA's proposals on how the university libraries could be best funded.*
- *In response, the USAf CEO, Dr Bawa, informed participants that it would be difficult for DHET or anybody else for that matter, to prescribe what should be allocated to libraries from the university grants because such allocations were at the discretion of Vice-Chancellors. In short, he said a statement could be made in the policy relating to the centrally funded national license initiative linked to Open Access (OA), citing it as the only feasible route to attempt to level the university library funding.*
- *A recommendation from the technical team was the development of a national policy on Open Access for the country. This policy should be developed by consulting with key stakeholders like the Department of Higher Education and Training (DHET), Department of Science and Technology (DST), South African Library and Information Consortium (SANLiC), Committee of Higher Education Libraries of South Africa (CHELSA) and Universities South Africa (USAf) amongst others.*

4.3 Library and Information Services Policy Development conference

The committee for the National Policy for Library and Information Services in South Africa held a feedback conference to all stakeholders at the National Library on 13 March 2018. It was well attended by librarians from all sectors including students studying towards a qualification in Library and Information Services. The draft policy has been circulated to the broader sector for comment.

4.4 Council on Higher Education (CHE) and Library and Information Services (LIS) Consultative Forum

The Chair-Elect, Ujala Satgoor was invited by the National Standards and Reviews Directorate of the Council on Higher Education to be a participant in the Consultative Forum whose aim is to visit the qualification standard for the Bachelor of Library and Information Science. A qualification standard is a statement that indicates how the purpose of the qualification, and the level on the NQF at which it is awarded, are represented in the learning domains, assessment contexts, and graduate attributes that are typical for the award of the qualification. This qualification will be at the NQF level 8 with 480 credits.

4.5 The Heher Commission of Enquiry into Higher Education and Training

CHELSEA was invited to do a presentation to the Commission of Inquiry into Higher Education and Training hearings on 27 October 2016. The Chair, Ms Webster and the Secretary, Dr Moyo attended the hearings and made a presentation to the panel. The report was released in November 2018 and we were glad that most of the points that were presented to Judge Jonathan Heher, who headed the commission, were captured. The full report is available at the following url:

<http://www.thepresidency.gov.za/sites/default/files/Commission%20of%20Inquiry%20into%20Higher%20Education%20Report.pdf>

The section dealing with academic libraries commence on p319. Pages 321-323 lists the recommendations made by CHELSA.

4.6 Copyright Amendment Bill

A request was received from Ms. Denise Nicholson for member institutions to submit details of their annual spend on subscriptions to electronic resources and journals as well as copyright blanket or transactional licence costs. Based on the responses received from 10 institutions, estimated budgets for 2018 subscriptions was R868 721 574 and for 2017 the total of copyright fees via blanket and transactional licences (using mainly already paid-for subscription materials) exceeds R19 524 024. This information was for a presentation to the Portfolio Committee on Trade and Industry to advocate for fair use and that educational exceptions remain in the Copyright Amendment Bill.

5 Conclusion

The past two years have been an eventful period with many events that affected the Library and Information Services of academic libraries. The Value Added Tax (VAT) which increased by one percent in 2018 was a further disrupting factor that compromised allocated budgets for the year. This is a challenge that demands a focussed campaign to obtain exemption of VAT for educational resources.

