

ANNUAL REPORT 2016



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

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1 Vision and Mission



2 Strategic aim

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

Vision

To transform existing library practices in Higher Education to respond to existing and new realities and to lay the foundation for the development of a learning society

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.

3 Overview of the year

The higher education landscape in South Africa was rocked by violent unrest and destruction of property for several months under the banner of *#FeesMustFall*. Time lost to the academic year ranged from a week to several weeks for some institutions. Apart from the University of Kwa-Zulu Natal Law Library, which was damaged, and invaluable records destroyed, damages to other academic libraries were negligible.

The financial crisis of the country towards the end of 2015 led to the rand plummeting and weakening significantly against major currencies. This fall-out resulted in many libraries scrambling to adjust budgets and find sufficient funds to cover subscription obligations. Many libraries reported that they had no choice but to cancel subscriptions in order to remain financially viable.

4 Personalia

The Library community bade a sad farewell to a number of colleagues, amongst them two stalwarts of the profession during 2016. The premature death of Mrs Yolisa (Yoli) Soul, University Librarian of Fort Hare, in June left a void in the SA academic library sector. Yoli served at the University of Fort Hare Library for 36 years. At the time of her death, she had just retired as the University Librarian. She was a founder member of CHELSA and mentored many librarians over the years.

We were deeply saddened by the passing of Mr Haffy Haffajee. Although he had been retired for several years as University Librarian from the former University of Natal, he remained an active member of the profession. He served the library profession with distinction as a member of the National Council for Library and Information Services (NCLIS) for several terms and was a founder member of LIASA and served on the SALI Trust.

We congratulate Ms Pateka Ntshuntshe Matshaya on her new appointment as Senior Director: Library and Information Services at Walter Sisulu University. She had previously served as the Director: Library Services at University of the Western Cape.

Ms Ellen Tise, Senior Director: Library and Information Services at University of Stellenbosch is on sabbatical for a year from 1 February 2017 to 31 January 2018. Ms Henriette Swart has been appointed Acting Senior Director, Library and Information Services during this period.

Dr Buhle Mbambo-Thata, Executive Director Library Services, University of South Africa opted to take early retirement in December 2016 after more than ten years at the institution. Dr Mbambo-Thata is a past chair of CHELSA and has played a major role in LIS in the country as well as internationally.

Ms Lindiwe Ndaki, Senior Director from Mangosuthu University of Technology, retired with effect from 31 March 2017 after more than twenty years at the institution. Ms Ndaki served the library profession with distinction as a member of the National Council for Library and Information Services (NCLIS) and is also a past Exco member of CHELSA.

We welcome two new members to the committee in 2017:

- Dr Shirlene Neerputh as Director Library Services at the University of the Western Cape (UWC) and
- Ms Sarah Kibirige as Director Library Services at Sefako Makgatho Health Sciences University (SMU).

5 Marketing

The first Exco meeting of the newly constituted committee was held in June 2016 and attended by all Exco members. The committee used the recommendations of the report by The Process Works consultants in terms of reinventing CHELSA. One of the main “failures” of CHELSA has been a lack of creating a clear history of the development of the organization. Exco agreed that the marketing of CHELSA should receive greater priority. One of the activities was to look at updating the website content, including publishing the historical background of CHELSA by drawing on the experiences of retired librarians such as Ms Clare Walker. In July 2016, the matter was discussed with Ms Walker and she agreed to write the historical piece. Considering that Ms Walker is retired there was no agreed firm time line. Ms Walker has been liaising with Wits University Librarian Mr Paiki Muswazi and has started gathering together files and other data in order to come up with an accurate and factual account. Information on the subject is not readily available from the records she has gone through so far. The exercise is still in progress. Previous chairs of CHELSA will also be interviewed in order to construct a coherent history of the organization.

6 National Digital licensing initiative

The dearth of information on the progress of the national licence initiative was raised during the AGM as well as the subsequent first Exco meeting. The chair was tasked to liaise with ASSAf and request information on the progress. In a subsequent teleconference with Susan Veldsman who is the Director: Scholarly Publishing Unit of the Academy of Science of South Africa (ASSAf), the following is a summary of the conversation:

- *What is the progress in terms of the national digital library and national licensing initiative?*

The National Digital Library will provide access to textual resources for education and training eventually; i.e. open education resources, text books for undergraduates, ebooks, open access journals as well as access to commercially available databases (national site license); repositories, data repositories; etc. The National Site license is therefore seen as one of the pillars/puzzle pieces of the National Digital Library

- *How soon is it likely to be implemented?*

The business case was handed over to both departments of Science and Technology and Higher Education and Training, at the end of last year --2015. After two workshops with both Departments in 2016, they requested us to add more perspectives and justifications, which we did and that was handed back to the Departments. The DST has convened an Executive Management meeting, whereby the business case was approved in principle. This will be handed now to the Minister for final signature. We have not been notified of the progress within the DHET, but informally I was notified

that the DHET is still considering this, and as per the new DHET Funding Framework most likely will be implemented in 2018/2019.

- *There was a task group in 2014/15 and 2 members of CHELSA represented us. Is there a status report that can be shared with the rest of CHELSA members? Our representatives informed us that they were not at liberty to reveal anything. As you can understand the rest of the members would like to know progress if any.*

A report was shared in confidence with the representatives at the end of last year and I would have expected that they would have at least shared the broad gist of the findings with CHELSA. Please understand that this report had to first serve on the high decision making levels of government (Minister, DG and DDG levels) and approved, before it can become something for far broader consultation and discussion. Therefore, the last thing we wanted was for the report to be distributed and widely discussed!!! The DHET and DST after all commissioned this report so it is theirs. The next phase of the project has been envisaged as a phase in which in-depth consultations with DVCs : Research and Finances.....as they would like to have input if any top slicing that will take place, as well as the expert knowledge of Heads of Libraries and SANLiC.

This report made a “case” for a national site license and that equity and equality of access will be achieved by such an initiative.

7 Engagements

7.1 The Fees Commission

The Chair, Lucille Webster, and Secretary of CHELSA, Dr Moyo, were invited to do a presentation to the Commission of Inquiry into Higher Education and Training hearings (The Fees Commission) on 27 October 2016. A PowerPoint presentation was prepared which were well received by the Commission. However questions raised by the panel, confirmed that they had little if any understanding of the financial challenges faced by academic libraries. The Chairperson of the Commission also queried as to what measures academic libraries engaged in to attract donations from the benefactors. One got the impression that in his view, there were many and we were just not looking! The hearings have not yet been concluded and as a participant in the hearings, we have not received any feedback.

7.2 Dialogue on Library book budget

CHELSA participated in a workshop initiated by the Executive Director of the University of Johannesburg Library and Information Centre, Dr Rookaya Bawa, and hosted by the University in November 2016. The theme of the workshop was to initiate a conversation or dialogue on the funding of academic libraries in higher education. This workshop was also to be used to discuss progress or lack of progress on the national site licence initiative. Other

presenters included Dr Ahmed Bawa, CEO of USAf and Professor Adam Habib of Wits University. Although there was consensus in terms of the financial challenges facing the academic library sector in terms of procuring information resources for teaching, learning and research, there were no short-term solutions. Dr Ahmed Bawa however undertook to investigate progress of the national licensing project. It was agreed that a meeting would be set up early in 2017 at the USAf offices to continue the dialogue.

7.3 Meeting with USAf

The meeting between USAf, CHELSA and SANLiC took place on 8 February 2017 at the USAf offices. The Chair, Lucille Webster, and the Treasurer, Vivian Agyei, represented CHELSA. Drs Bawa and Kramer represented USAf.

Ahead of the meeting, CHELSA had sent some questions to USAf that they wanted addressed. Questions focussed on the form that the national licence would take, who would manage the procurement, is there a feasible date for implementation and would institutions have input on the list of centrally funded resources. Unfortunately, USAf was not able to answer much. According to USAf, a memorandum has been handed to the two Ministers - Science & Technology and Higher Education & Training - and that it awaits their signatures. Dr Bawa explained that there had been various iterations of the business case report for the National Site License initiative but that he had not yet seen the final report.

We therefore do not yet know what governance structures the National Site Licensing Initiative (NSLI) will take. Besides the 26 universities and Research Councils, we are not sure what other institutions will benefit from the initiative. In all likelihood, government departments such as Health and Water Affairs would also benefit from national access to databases. Dr Bawa reiterated that the primary interest of the vice-chancellors of the universities in the NSLI is a reduction in the cost of journal/database subscriptions and secondly, wider access to resources. He further noted that the earlier version of the NSLI report assumed the following:

- The assumption that a National Site License initiative will yield lower costs. The report indicated that Brazil, Pakistan and Chile had achieved up to 80% savings on the list price of journals.
- The assumption that greater access would be achieved which would in turn lead to greater contribution to the knowledge economy. The possibility exists that the top slicing envisaged may compromise funding available for niche journals that are essential for specific contributions to the knowledge economy.

Dr Bawa shared the concern that the assumptions may be problematic and was keen to pursue the idea of a workshop with Dr Ralf Schimmer to explore if the Open **Access 2020** strategy could possibly add value to the debate. Dr Schimmer will participate in the upcoming SANLiC workshop in May 2017 to which USAf has also been invited.

The topic of the funding formula for academic libraries raised by Lucille Webster was also discussed. It was noted that some years ago Professor John Willemse published his findings on his study of the funding of African academic libraries. Perhaps this is something that CHELSA should look at again.

We hope that when the report is released it will shed light on the following questions

- How do we go about reaching consensus on the list of centrally funded resources?

- How do we address the challenges of the current funding crisis and their impact on this initiative?

7.4 SAUSnet

Dr Moyo and Ms Ujala Satgoor represented CHELSA at the SAUSnet meeting in March. The presentation was well received and several pertinent questions were raised by academics who attended the meeting:

- Will libraries continue to exist in the face of advances in technology?

Response: Yes, libraries will continue to exist although they may change in terms of shape / form and size. New library technologies / applications were being developed such as GPSs to find books on library shelves, book drones; etc.

- How will libraries deal with the ever-rising cost of information resources especially online journals?

Response: Buying through consortia such as SANLiC, the issue of the National Site License initiative. Disrupting the publications industry by not subscribing to unnecessarily expensive resources.

The full presentation (and discussions) is on:

http://www.au.uct.ac.za/sites/default/files/image_tool/images/207/AcademicsUnion/SAUSNET%20Conference%20notes%20from%20Hussein%20Suleman_27_29%20January%202017.pdf

8 CHALLENGES AND RECOMMENDATIONS

The current Executive Committee, as with its predecessor, has been remotely running the CHELSA office without professional support to lead the forum's strategic initiatives that require the following (verbatim from the 2015 Chairperson's report):

- A highly professional and a seasoned Manager with a deep knowledge of academic library and information services to prioritize, coordinate and drive the CHELSA projects
- Securing of stable and reliable partnerships for CHELSA
- Looking out for calls for grant proposals or seed funding and drafting funding proposals that can attract funders and guarantee stability of the forum
- Conducting and organizing workshops for CHELSA member libraries on topical issues affecting the development of libraries

- Fostering partnerships and facilitation of alignment of CHELSA initiatives with organizations having similar interests (nationally and globally)
- Acting as a CHELSA Marketing Officer to ensure the forum's visibility and positioning
- So far, the current Executive Committee has had to secure limited time between their office demands and CHELSA initiatives.

LUCILLE WEBSTER

CHELSA Chairperson