School Libraries and Outcomes Based Education
A study of factors impacting on the development of school libraries with focus on disadvantaged areas in the Western Cape Province

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Titel: School Libraries and Outcomes Based Education: A study of factors impacting on the development of school libraries with focus on disadvantaged areas in the Western Cape Province

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Abstract: The purpose of this Master’s thesis was to examine different factors influencing the process of establishing and developing school libraries in relation to the implementation of a new outcome based curriculum, Curriculum 2005. The main focus was on under resourced areas and a field study was conducted in 1998 in the Western Cape Province during the first year of implementation. As a frame a Swedish – South African school library project, that lasted between 1997- 2002, was used. The findings from the field study were analysed according to a model identifying different factors influencing the process of implementation of educational change in underdeveloped countries. Four evaluations of the project were incorporated in the analysis with the aim to enhance the findings from the field study but also to question them. The aim was not to evaluate the project itself. The conclusions reached were that several of the factors found to affect the implementation process were not specific for under resourced areas, but could also be found in the research regarding developed countries. Some factors were however found to be specific for many of the under resourced areas, such as shortage of adequate learning resources, especially in the indigenous languages, dependence on external support such as voluntary workers and donations, infrastructural problems, absence of possible co-operating public libraries, locked libraries due to security problems etc. Many of these factors could be referred back to inherited inequalities.

Keywords: school libraries, South Africa, outcomes based education, Curriculum 2005, information literacy, LPYL, MFS,
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1. Introduction

In 1994 the apartheid regime was officially abolished in South Africa and education became a field of high priority in the process towards a new democracy. Major structural changes within the field of education took place and one single common National Education Department was established. Until then there had been separate Education Departments for the Indian, coloured, black and white population as a result of the introduction of the apartheid education system in 1948. Also at provincial level the earlier separated Education Departments in the today nine, in great extent independent provinces, were amalgamated into one. At the same time the school library services belonging to the Education Departments were joined together in the same way.

In 1998 the first national curriculum began to be implemented in all South African schools. The new curriculum, Curriculum 2005, focused on outcomes based education and was built on a learner centred, investigative way of learning, similar to other curricula’s that have been introduced in many parts of the world during the last decades. Although school libraries were not directly emphasized in the new curriculum, the changed focus in education stresses the importance of access to a wide range of adequate learning resources and guidance in the process of developing information literacy. An essential question therefore, is, if and how the work with establishing and developing school libraries in order to support the new curriculum has been performed. This is of special interest considering inherited conditions and differences from the past.

With the aim of investigating what the school library situation was like when Curriculum 2005 first began to be implemented in 1998 and what obstacles one came across in the work with development, a field study was conducted in the Western Cape Province in October and November of that year. During nine weeks the work at the Education Departments Library and Information Service (EDULIS), belonging to the Western Cape Education Department (WCED), was followed closely. Above all, the focus was on intimately observing the everyday work of the Media advisors.

A number of people and schools appearing in the study have been involved in a Swedish- South African partnership project called Library practice for young learners. Developing school library resources to primary and secondary schools in disadvantaged areas in South Africa (LPYL). The project was carried out in two phases between 1997 and 2002. It was financed by the Swedish International Development Agency (SIDA) and involved initially two library associations, the Swedish Bibliotek i Samhälle (BIS) and the South-African Library and Information Workers Organisation (LIWO). In the second phase LIWO, which by then had been dissolved, was replaced by the Education Policy Unit (EPU), Natal. The goals of the project were to establish working relationships between librarians in both countries and exchange ideas and experiences of developing school libraries and ways of learning. The focus was on the school library situation in underprivileged areas. Experiences by participants, partly during the field study, and later partly in the form of evaluations, articles and shared experiences have contributed extensively to the outcome of this study.

The aim of this thesis has not been to evaluate the outcome of the LPYL- project, but to focus on different factors influencing the process developing school libraries in relation to the introduction of outcomes based education, with a focus on less privileged areas.
Kingsley Banya, Professor of Curriculum Theory and Comparative & International Education and former Chairperson of Educational Leadership and Policy Studies Department at Florida International University, Miami, Florida, USA, has studied what he and other researchers found was an overlooked issue and often referred to as “the missing link”, namely the process of implementation. He did this in the form of a case-study of a project in Sierra Leone, Implementing educational innovation in the Third World: a west African experience (1993), where he tried to identify different factors affecting the implementation of educational change in the Third World. In the foreword of the study, David N. Wilson, Professor of Comparative and International Education at the Ontario Institute for Studies and Education, establishes that Banya “deals with a neglected aspect of the process of national educational development in the Third World: the implementation of planned change” and further that, “Kingsley Banya adds an important missing dimension to this literature [literature empirically studying the implementation process]: consideration of the economic, social and political factors impacting upon the implementation process.” Banya, at the end of his study concludes, that, “It was only in informal discussion that frank problems were raised with the researcher and some tutors”. (ibid, p.151f) This last, I consider being one of the strengths in this field study. As a cause of this, a simplified model based on Banya’s model of factors affecting implementation is used to analyse the results.

Besides experiences from the field study a review of published material concerning this topic has been used. Four later published evaluations of LPYL have also been incorporated in the analysis and discussion (Dick, 1999; Leach, 1999; Alm 2002 and Naiker & Mbozaki, 2002).

1.1 Purpose of the study and framing of questions

The purpose of this study is to evaluate the situation of school libraries, with a main focus on less privileged schools, in the Western Cape Province and their development in 1998-2002 in relation to the introduction of a new outcomes based curriculum.

More specific questions:

1. Is the situation of various school libraries different and what is the basis for these differences?

2. What factors influence the development of school libraries, both practical and in relation to the implementation of new educational approaches?

3. What are the possibilities of development of school libraries in the Western Cape Province?
1.2 Definitions

In this thesis people of different ethnical belongings are referred to as they refer to themselves in daily conversation during the field study, namely in accordance with the old ethnic division:

**Africans/ blacks**: Bantu-speaking people, i.e. Xhosa, Zulu, Sotho etc.

**Asians**: A group dominated by Indians

**Coloureds**: Khoikhoi and Khoisan-people and also other groups that during time have been mixed with these two.

**Europeans/ whites**: Mainly from Dutch and English origin.

**Afrikaans**: A language originally spoken by the Dutch. Not to be confused with African language, which refers to the different Bantu languages.

**Curriculum 2005**: The new outcomes based curriculum which began to be implemented in South African schools in 1998 and should be finished and evaluated during 2005.

**Disadvantaged/ under-privileged/ under resourced schools/ areas**: are defined in this thesis by the participants of the LPYL-project and the Media advisors

**EDULIS**: Education Library and Information Services, belonging to the Western Cape Education Department.

**LPYL**: Library Practice for Young Learners

**Media advisor**: person working for the provincial Education Departments Library and Information Services, as counsellors assisting schools in the development of their school libraries

**OBE**: Outcomes Based Education

**School library**: is here defined by the IFLA/UNESCO School Library Manifesto:

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.

**WCED**: Western Cape Education Department.
1.3 South Africa and the Western Cape

South Africa is divided into nine largely independent provinces; The Free State, Gauteng, KwaZulu Natal, Limpopo, Mpumalanga, North West Province, Northern Cape, Western Cape and Eastern Cape. The country has approximately 44.8 million inhabitants (Census 2001), belonging to a number of ethnic groups. There are eleven official languages of which Zulu has the most native speakers with 23.8%, followed by Xhosa 17.6%, Afrikaans 13.3%, Pedi 9.4%, English 8.2%, Setswana 8.2%, Sesotho 7.9%, Tsonga 4.4% and Venda, Ndebele, Swazi and others 7.2%. Officially one refers to the population as being either coloured, black/ African, white or Indian. The Africans constitutes 79% of the entire population, followed by the whites, or Europeans as many of them refer to themselves, with 9.6%, the coloureds 8.9% and the Indians 2.5% (CIA-the World Factbook, 2005).

The official rate of unemployment is 26.2%. Of the working population 3.6% work in the agricultural field, 31.2% in the industry and 65.2% with services. The poorest 10% of the households earn 1.1% and the most wealthy 10% earn 45.9% of the total income. Fifty percent of the population is estimated to live below the poverty line. At the same time South Africa is in possession of significant natural resources and has a stock exchange belonging to the world’s ten largest. According to the CIA World Factbook South Africa has “the best developed and most modern” telephone system in Africa. In 2002 there were 4.844 million main line telephones and in 2003 no less than 16.86 million cell phones. There were 17 million radios in use 2001, 6 million TVs (2000) and 3.1 million Internet users (2002) (Census 2001; CIA-the World Factbook, 2005).

Of the entire state budget 21% is spent on education. Among the population older than 15 years, it is estimated that 87% of the men and 85.7% of the women can read. The number of learners passing their final exams increased between the years 1996-2001 from 40 to 60% (Land i förändring 2004, p.9f, 30). About 80% of the black and 40% of the white population had however, according to the late minister of education in the middle of the 1990s, problems reading, as they left primary school and approximately 15 millions of the black South Africans were considered illiterate (Litteratur I Södra Afrika, 1996, p.91). These numbers of illiterates have however been questioned by a 1996 published research-report (The social uses of literacy: theory and practice in contemporary South Africa, 1996). One part of the criticism was directed at the construction of reports, policies and educational practice that are claimed to be developed from nothing but assumptions. The research also criticised the traditional definition of literacy and illiteracy. (ibid, p.36f, 177).

1.4 Delimitations

The field study focus on school libraries in compulsory schools and was conducted in the Western Cape Province. Some shorter visits were also made to the provinces of Gauteng and the Free State. The reason for choosing the Western Cape Province was that two of the participants of LPYL; the head of EDULIS and one of the Media advisors were willing to assist and let me participate in their daily work during a fairly long time. Since the Western Cape is a rather wealthy province with a well extended Library- and Information Service, this presented rich opportunities to accompany the Media advisor and other colleagues in their everyday work, travelling around the province assisting schools in establishing and developing of school libraries.
1.5 Disposition of the thesis

Following this Introduction, the thesis is divided into nine further chapters. The first four constitute background. From Chapter Five onwards the results, the analysis and discussion are presented.

In Chapter Two the methodology used is described and discussed.

Chapter Three gives a background both to the South African education system and school libraries, and to outcomes-based education. It also deals with school libraries in South African official policy documents.

In Chapter Four the theory and model used for analysing the results from the study is presented.

In Chapter Five the work at EDULIS is described.

In Chapter Six a selection of schools visited during the field study are described, with the aim to display different contexts.

In Chapter Seven the experiences from the field study, presented in Chapter Five and Six, are analysed and discussed together with incorporation of later published evaluations of LPYL.

Chapter Eight presents the conclusions reached.

Finally a summary is given in Chapter Nine.

The thesis ends with a list of references.
2. Method

In this chapter the choice of method and a discussion about the advantages of this method are presented. An account is given for the search of literature. The procedure of collecting data during the field study is described and also the later treatment of these. Finally, a reflection of the validity and reliability of the conclusions reached is given.

2.1 Literature search/ analysis of documents

The search for literature has served several aims and has been performed both in Sweden and in South Africa continuously, before during and after the field study.

The purpose of the initial searches done in Sweden, was to develop a picture of outcomes based education, to create a general understanding of the present South Africa and of the history and also to become closer acquainted with the then recently started LPYL-project. The searches were performed at Nordiska Afrikainstitutet (NAI) in Uppsala, in the Swedish National Library’s Catalogue; LIBRIS, and at SIDA’s collection of earlier MFS-studies at Sandö. Searches were also made in the national library web-catalogue of South Africa.

In South Africa searches for information were performed at the above mentioned South African Library in Cape Town and at the library at EDULIS; EDULIB. Much valuable information in the form of different policy documents and interesting articles, both national and international, were also provided by the head of EDULIS. The aim of these searches were to find out what official South African policy documents said about the role of school libraries, partly in relation to the implementation of a new outcomes-based curriculum. It was also to follow the debate around Curriculum 2005, school libraries and outcomes based education. The official policy documents found and reviewed in this thesis, are the new curriculum, Curriculum 2005 and A National Policy Framework for School Library Standards, which was the first Policy Framework for School libraries and published in 1997.

After the closure of LPYL in 2002, searches for evaluations and other material related to LPYL have been done. The project has nowadays its own website, where published material related to the project is linked. The reason for including this material into the study is that it would enhance the validity of the results from the field study and also put focus on what might be doubtful.

2.2 About Fieldwork and qualitative research

Idar Magne Holme and Bernt Krohn Solvang emphasize, that it is important to choose an appropriate method for the question to be researched (1997, p.14). Regarding fieldwork Pål Repstad says (1993, p.38), that it should be planned like a funnel; starting with an open and broad approach for more specific questions to appear, as the reality of the informants, their thoughts and feelings become clearer, in order to be able to draw an authentic picture. The initial openness and flexibility of this method are characteristic for qualitative methods, he claims, an opinion shared by Jarl Backman (1993, p.52) and also by Holme and Solvang (1997, p.92).
The aim of qualitative methods is to reach a deeper understanding, not necessarily to try to decide whether the information has a general validity. Besides openness and flexibility, qualitative methods are characterized by a physical and social nearness between the researcher and the investigated unit, which is defined as a subject-subject relation. First by entering into the world of what is being investigated, it is possible to develop an understanding, which is the primary goal of qualitative research. Unlike using quantitative methods, information is often structured and organised afterwards.

The qualitative report should contain detailed descriptions of people and activities, when this contributes to the understanding of the context (ibid, p. 93).

Holme and Solvang describe the qualitative method as a collective concept consisting of five different techniques, which can be more or less combined; direct observation, participating observation, interviews of informants and respondents and analyses of sources. (ibid, p.91)

Kingsley Banya (see Chapter Four) suggests in establishing his conclusions regarding evaluations, that “these often elicited positive response even though the converse might be true. The answers were given to please the authorities and make schools appear supportive of the project. This was especially true when questionnaires were used to find out how a school was doing. It was only in informal discussion that frank problems were raised with the researcher and some tutors” (1993, p.150f). Also Pål Repstad finds more or less spontaneous conversations in the natural environment to be more valuable than interviews, which can easily produce artificial response. (1993, p.58)

2.2.1 The field study

In this thesis all the above mentioned techniques were used and will now be given an account of, except for the already mentioned analysis of policy documents.

The field study was conducted during nine weeks in October and November 1998 in the Western Cape Province. Most of the time I followed one of the Media advisors, who was also one of the participants of the LPYL, but a few times I also accompanied some of her colleagues. The schools visited were chosen by the Media advisor and they were usually situated in disadvantaged areas. They represented the five different types of schools, regarding ownership, governing and financing, namely; State schools, Community schools, Farm schools, Model C schools and Private or Independent schools (School Learners and Libraries 1996, p.8).

The Media advisor’s work consisted of supporting schools in establishing and developing school libraries in the province - more than 1700 schools - and it involved much travelling and practical work. The province was divided into three districts and two advisors together co-operated in each district, one with the more practical part of building up the physical library and the other working with promoting information skills. The ability to travel with the Media advisor and intimately follow her everyday work visiting different schools in the province, provided excellent opportunities to meet with people living under very different conditions and also a large freedom to observe, walk around, listen, ask and discuss, both during the visits and also when travelling to and from the schools, which was often a significant distance.
2.2.1.1 Access to the field

Arriving in South Africa and the Western Cape, it soon appeared that the introduction letter from SIDA and the invitation from the Head of EDULIS was no guarantee to be able to carry out investigation in the WCED Schools. After first, with assistance from the Head of EDULIS, having applied to WCED to do research in the WCED schools and then, once again with the same assistance, having applied for permission to travel with the Media advisors in the governmental cars belonging to WCED, I was able to follow the Media advisors in their work. The Media advisors were necessary keys to get access to the field, not only for transport, but even more because they often had both the professional and the social contacts out in the field.

2.2.1.2 The informants and respondents

The informants and respondents during the field study consisted of the Media advisors, the principals and teacher-librarians/external helpers and other staff in the approximately 35 visited schools. It is difficult to estimate exactly how many persons have been involved in the study, depending on how one chooses to define an informant/respondent. Much information was received in very casual situations, such as coffee breaks in staffrooms, by a teacher passing by as we were standing in the library etc. These situations might seem unimportant, but often they were rather informative in giving a view of the attitude towards and the priority of the school library.

For background information and contextual understanding, there were many persons who contributed tremendously in different ways through informal conversations, discussions and time-sharing in general: the Head and other staff at EDULIS, participants of LPYL, people at institutions for librarianship at visited universities, librarians at different public libraries, other attendants at the first held conference of the Library and Information Association of South Africa (LIASA) and other persons without professional connection to the school library world.

2.2.1.3 Observations

The observations in the schools were open. Arriving at a school together with the Media advisor the principal was always visited first, then the teacher-librarian/external helper. I was introduced and the purpose for me following the work of the Media advisor was explained, even if not always described in detail. To avoid the informants/respondents feeling too much observed and interviewed, I avoided taking notes during our conversations and discussions, but did this either in the car on the way back or later the same evening. I thoroughly documented by taking approximately 800 photos during the nine weeks, which were of great valuable for later remembrance. Whether the observations can be claimed to be non-participating or not, is not easy to say, as the presence of a white non-belonging person was quiet obvious, even if my role was supposed to be rather passive. The length of the visits to the schools varied, depending on the reason for the Media advisor to be there, but normally we stayed for a couple of hours to half a day. Since there was a drive of several hours to a school, a lot of time was spent travelling together with the Media advisor. This provided valuable opportunities to discuss the different schools and their libraries, both before and after the visits.
The things observed in the schools were partly the physical and practical premises of the school libraries such as shelving, present/ lacked media, lending system, opening hours, staff time allotted for the library, whether there were trained or untrained staff responsible for the library, existence of co-operating public libraries etc., partly the interest/attitudes among the staff and the principal towards the school library as a contributor to outcomes based education. The Media advisor also registered if for instance books supplied by donators at earlier visits had been taken care of and put into accession register etc.

2.2.1.4 Interviews

Initially the intention was to use questionnaires and structured interviews when visiting the schools. As I soon became more acquainted with the Media advisors way of working, however, and also of the diversity between the schools, I realised that this was not the best way to get access to valuable information. Especially since I was not quite clear regarding what information I was looking for. Besides observing and listening, I found less organised situations in forms of unplanned and unstructured interviews and spontaneous informal conversations provided more valuable, correct and honest information than when the informants/respondents were aware of real or assumed expectations and, consciously or unconsciously, adjusted his or hers answers and opinions to the expected, more suitable or politically correct ones.

A record was kept of all visited schools in three copies; one at EDULIS and one each by the co-operating Media advisors. In the record was noted what had been done earlier, what had been offered, discussed and planned and was updated after every visit for their own information and also for the colleague to know what the current situation was at the school before going there. These acts for the schools visited during the field study were also a source of information.

2.3 Treatment of data

The findings of the field study together with the reviewed literature and the evaluations of LPYL will be analysed and discussed according to a simplified model based upon a model drawn from education by M. Fullan, consisting of factors affecting implementation of educational change. Interesting social, economic and cultural factors have then been added by K. Banya, who after having used the model for analysing a project of rural development in Senegal, found these missing factors often played an important but overseen role in planned change, especially in third world. Banya's revision of Fullan's model will, because of the many similarities in context between Senegal and South Africa, be thoroughly described in Chapter Four. Reasons for using a simplified model, based on Fullan's/ Banya's model and excluding some of the factors and instead concentrating upon the factors found to be most relevant, is the large amount of empirical material, the extent of Fullan's/ Banya's original model in combination with the limits of this thesis. The simplified model will be described in Chapter Seven.
2.4 Validity and reliability

As the methods used in this thesis are qualitative and the uneven nature of the collected data depends on someone’s, in this case my, understanding and interpretation of what was observed and experienced, they are in themselves limited, as a person can never remain totally objective, no matter, how sincere her efforts may be. Backman suggests, that observation using qualitative methods is a rather complex process, since it depends on someone for interpretation (1993, p. 53). Holme and Solvang points out that researchers neither are nor can be totally objective. (1997, p.151) They also notice that results coming from qualitative methods still often have to be argued for (ibid, p.91). I have though, during the observations, informal interviews and discussions, strived after hearing several and different opinions about the same issue and tried to remain as objective as I could. As far as possible, the situation, interests and objectiveness of the informant has been considered in the analysis. Because of conditions given by the Western Cape Education Department, the observations and interviews from the field study are being presented anonymously.
3. Background

This chapter presents the role of school libraries in relation to outcomes based education and information literacy. A historical background of the South African education system and its school libraries is given, together with a review of today’s policy documents concerning school libraries.

3.1 OBE, information literacy and school libraries

The last decade’s fast expansion of media in different forms, together with an explosive development in the field of information technology, has during a relatively short period increased the access to information tremendously. Due to this big change in society, the focus in education has moved towards a more learner-centred and investigative way of learning, with the aim to help students develop skills to handle the information flow in society.

Since the IFLA/UNESCO School Library Manifesto: the school library in teaching and learning for all was published in year 2000, it has been translated into 33 different languages. (2000). Two years later, it was followed by another document, the IFLA/UNESCO School Library Guidelines. This has been developed with the involvement of many different countries and with recognition of various contexts (2002). The aim of the guidelines, are “… to inform decision makers at national and local levels around the world, and to give support and guidance to the library community … to help schools to implement the principles expressed in the manifesto.” (The IFLA/UNESCO School Library Guidelines, 2002, p.2) The role of the school library, as presented in both these documents is:

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. (IFLA/UNESCO School Library Manifesto… 2000, p.1; IFLA/UNESCO School Library Guidelines 2002, p.3)

Besides dealing with practical issues, such as funding, furniture, equipment, collections, electronic resources etc., the guidelines strongly emphasizes the importance of having staff with adequate education, the educational role of the school librarian, the cooperation between teachers and school librarians etc. It also presents a model for Study Skills and Information Literacy Programme. One of the references used for producing this document, is the South African A National policy Framework for School Library Standards (1997), reviewed later in this chapter.

Linda Langford, doctoral candidate at the Charles Sturt University, Australia (Langford 1998) established that literacy today is more than the ability to read and write (cf. The social uses of literacy: theory and practice in contemporary South Africa, 1996) and that we, if we believe that literacy is a necessary condition for education, have to approve that literacy is a changeable concept. The interpretation of concepts, she claims, is dependant on the needs of a society at a special time. This change is often referred to as an educational paradigm shift. Many new definitions have emerged in connection to this, such as; information literacy, information skills, outcomes based education,
resource based learning etc. Often, however, there seems to be a lack of clarity about the meaning of all these definitions, especially among educators.

These issues regarding Information Literacy are also recognised in a White Paper that was prepared for UNESCO, the U.S. National Commission on Libraries and Information Science, and the National Forum on Information Literacy in 2002; An Analysis of Information Literacy Education Worldwide (Moore 2002). Penny Moore, Educational Research Consultant and Executive Director of the International Association of School Librarianship (IASL), in the documents says, that:

… information literacy cannot be captured completely in a snapshot; it is more like an epic film being made from a script under constant revision. This has implications for development strategies and evaluation at individual student, school and regional levels.

(Moore 2002, p.3)

She also points out the issue with an increasing flow of information, due to continuous development of technical inventions, but says that the “… relationship between information and action [e.g. learning, decision-making and problem solving] has been severed…” since all energy has been focused on these technical aspects. (Moore, 2002, p.1) Moore shows through many examples that information literacy, even though acknowledged as important among teachers, is still fuzzy to many of them and causes feelings of uncertainty (ibid, e.g. p.6)

3.2 Education and school libraries in South Africa

In South Africa, as in many African countries with a colonial past, more formal schooling was first introduced by European settlers and the influence in education from these regimes is today still visible in the curricula’s of several countries. Education has often functioned as an important tool, when dominant groups have tried to assure their own position and power in society by selecting and limiting the access to information and knowledge (Banya, 1993). In South Africa this was true also before the better known apartheid era, which served to uphold a segregated society. Racially based inequalities, as for instance access to human, financial and thereby also material resources, have characterised the education system and have left behind a deeply unequal situation in South-African schools that will probably still take many years to rectify (Donn 1995, p.5). The inherited inequalities concern also the school libraries. Naiker and Mbokazi refer to an analysis of the situation performed by researchers of the National Education Policy Investigation in 1992, which establishes that “school libraries were concentrated mostly in urban white, Indian and coloured schools.” (2002, p.6)

The Western Cape Province, previously part of the earlier Cape Colony, was the first in South Africa to be colonised and this is also where the first formal schooling took place. Religious education was introduced with the Dutch in the 17th century, though not to any great extent. In the beginning of the 19th century British missionaries arrived with the aim to convert the indigenous population, and the schools became a way to spread the British language and traditions and also to gain social control (Dahlgren 1997, p.15).

In 1910 the Union of South Africa was created together with the four original provinces; Cape, Transvaal, Northern and the Orange Free State. The politic pursued, had the
intention to unite the white population and conduct a segregated policy against the Africans. Among several responsibilities that the provinces had, was education. About the same time compulsory education was introduced for white children between the age of seven and fourteen. This was a consequence of education having started to be viewed as a way to gain social and economic power and demands had risen among the population. Africans, however, still had to depend on mission schools and the church, even if these received some increased financial support from the state. As a reaction among Africans against the strong British influence in the education system, they began to establish schools themselves, with the aim of preserving their own culture, religion and language. (Dahlgren 1997, p.15; Donn, 1995, p.2; School Learners & Libraries, 1996, p.6)

In 1948 the apartheid education system was introduced, as the Nationalist Party (NP) came to power, separate Education Departments were established for the Indian, coloured and black population. In 1953 the Bantu Education Act was introduced which was based on separation of different racial groups. Education was an important tool to keep up the segregated society. With boiling feelings about the system and repeated conflicts in the language-issue, the attempt to introduce compulsory teaching in Afrikaans became one of the final causes for the Soweto uprising in 1976. After this event changes started to take place, even if a period of resistance against education followed for almost ten years. A new Act, which promised more economic support to education for Africans, was adopted shortly after the uprising, but the segregated system remained. At this time some Non Governmental Organisations (NGOs), as for instance the in South Africa well known READ Educational Trust began to support many African schools all over the country with school library resources (Donn, p.4; School Learners & Libraries, 1996, p.3, 9; Dahlgren, p.16).

In 1980 an in-depth investigation of all education took place under the Human Research Council, also known as the Lange Commission. In the report, published in 1981, mixed messages were presented. The establishing of one single ministry of education was recommended as also free, compulsory basic education for all of equal quality. (Dahlgren 1997, p.16) At the same time the report;

stressed the irrelevance of academic education for Africans … It noted the role of a ‘more practical learning paradigm’ to be developed … in black communities … meanwhile stating the principle of equal opportunities for education … irrespective of race, colour, sex or creed…(Donn 1995, p.4)

Many of the recommendations were accepted, with the exception of the establishing of one single ministry of education. The government was not willing to change the segregated system. (Dahlgren 1997, p.16)

Until 1994 there were 15 different Ministries of Education, which were racially and ethnic based. Each of the previous four provinces also had a provincial administration, which belonged to the white House of Assembly’s Ministry of Education (HOA) and which is the reason for the number of the old departments sometimes being mentioned as 19. The 15 Ministries of Education all had their separate parliamentary acts and developed their own systems. The schools for whites were the ones of the highest quality, followed by those for Indians, coloureds and Africans (School learners and libraries, 1996, p.6, Report of the committee…1995, p.15)
The costs spent by the state on pupils from the different ethnic groups varied considerably. As late as in 1994 the per capita education expenses by the former departments differed from HOA’s R 5403 to Transkei’s R 1053. The average expense was R 2222 (Report of the committee... 1995, p.15; School Learners and libraries 1996, p.7). In statistics from 1988-89, a difference is also visible between the money spent on African pupils in cities, R 765 and in the homelands, R 481. (Dahlgren 1997, p.16). Of the education budget in the beginning of 1990s, the white population, which consisted of approximately 13 % of the total population, received 38 %, while the black population of 76 % had to make do with 9 %. Ninety nine percent of the white children and 70 % of the black went to primary school, while only 20 % of the black children went to secondary school and 89 % of the white (Sellström 1995, p.560).

A proposition regarding redress of the state-funding of schools was however made in November 1998. The proposal implied that each province would rank all its schools from the poorest to the wealthiest and divide these into five sections. The worst off schools would then receive the highest funding, while the wealthiest would get less, in accordance with a subsidy system. Also the school-fee system would change and the parent’s income would be considered when paying the fees. One further thing in the proposal was that the provinces would be obliged to allocate learning materials for at least R100 to every pupil each year. If the proposal was accepted in the parliament in 1999 the new funding system was going to be initiated in year 2000 (oral information received from staff at EDULIS). A redress has since then taken place and today the poorest 20% of the schools receive seven times as much in state-funding as the wealthiest 20% (Land I förändring 2004, p.29)

Besides the different Education Departments, there were several different school models, which in great extent were inherited from the old into the new system. Basically, one differed between five different types of schools, regarding ownership, governing and financing and which usually are referred to as State schools, Community schools, Farm schools, Model C schools and Private or Independent schools (School Learners and Libraries 1996, p.8-9; Report of the committee... 1995, p. 16ff). The description of the different schools that follows is referring to the situation before the earlier mentioned redress began to take place.

State and state-aided schools were almost wholly owned and financed by the state. For instance library facilities were supposed to be catered for by the state, though school fees often were charged, however not legally enforceable. Around a third of all South-African primary and secondary schools belonged to this group. The level of funding for the state schools varied deeply between the better off schools belonging to the HOA and the poor rural African schools, which seldom had a library in use even if the space originally was prepared for this purpose (Report of the committee 1995, p.16ff; school learners and libraries 1996, p.8).

Community schools were built and maintained by communities. These schools were mostly situated in rural areas and in the former Homelands. Only operating costs, like teachers salaries, textbooks and stationery were generally paid for by the state. Libraries or library-collections were seldom found in these schools. In urban areas the building of community schools were normally financed by the state, while in the rural areas some extremely poor communities have had to pay for the building themselves. Like most of the schools situated in rural areas, as Farm schools and State schools, Community
schools were extremely poor and often lacked basic needs such as running water and electricity not to mention learning resources and books (Report of the committee… 1995, p.18ff; School learners and libraries 1996, p.8).

Worst among all were the so called Farm Schools. These schools belonged to and were provided by private farmers for the children of their black farm workers, who were among the absolutely poorest in the country. They received subsidy from the state of 100% for buildings and 50% for maintenance costs, still these were held to be the poorest and worst resourced schools in South Africa. They were administered under the old Department of Education and Training (DET), to which all black schools outside the Homelands belonged. Farm schools were originally envisaged in the Bantu Education Act of 1953. Around half of all children living at farms owned by white farmers did not attend school. Only five percent of the schools were secondary schools. The majority of the farm workers were illiterate. First after 1988 the farmers were no longer allowed to let the children work during school time. (Report of the committee…1995, p.19f; School learners and libraries…1996, p.8)

Model C schools, the former state schools for whites, were until 1992 well founded by the state and did not charge compulsory school fees. They were the state schools that were best staffed and best resourced. That year however, the government let the schools know, that the funding from the state was going to be cut down. The schools who wanted to keep up the level could choose to convert into Model C schools, which 94% of them had chosen to do and which meant that the parents started to pay compulsory fees to cover about 15-25% of the operating costs. These schools usually had well resourced libraries, sometimes computerised catalogues and access to Internet. (Report of the committee…1995, p.21f; School Learners and libraries… 1996, p.8)

About 500 of the South-African schools were Private or independent schools. The standard between these schools differed widely from the more exclusive schools, where the fees were higher than R 15 000 a year and less fortunate ones, often located in city centres and which were very poor and heavily under-resourced. The first mentioned, often had very exclusive libraries or media-centres, provided with the latest information technology. These schools also received subsidy from the state, but the major funding usually consisted of school-fees (Report of the committee… 1995, p.22; School Learners… 1996, p.9)

The existence of school libraries and the differences in access to learning resources varied much between the different departments. In the National Education Policy Investigation (NEPI) Library and Information Services Research Group report from 1992, it was found that the differences almost totally depended on the type of school and which education department the schools belonged to and whether this had a formulated policy regarding school libraries or not. The four old white provincial education departments, House of Assembly’s (HOA), for instance all developed their own policies which acknowledged the important supportive role the school libraries had in teaching and promoting reading skills. Unlike the schools belonging to the HOA and the House of Delegates (HOD), which catered for the Indians, both were found to have well equipped libraries that received support from the respectively subject/- Media advisors. The old DET-department, which was responsible for the education of blacks in the non-homeland areas, officially acknowledged in 1983 the importance of school libraries in education and encouraged the training of teacher-librarians and the
providing of school libraries. Ironically this development was negatively affected, as the old system with different education departments was abolished in 1993 and budgets were cut-down (*School Learners*… 1996, p.7f; *To set the ball rolling* 2002, p.6).

In the former white and Indian schools, which were better provided with resources and also had developed school library policies, teacher-librarian posts were established. Also in some of the coloured schools teacher-librarians were found, but very seldom in black schools. The school libraries in white schools did loose many posts for teacher-librarians during the 1990s however, as the provincial education departments made cut-downs (*School Learners and libraries* 1996, p.9, 11)

South Africa had for many years a well established book market with textbooks for schools as the big income. This, however, had very little connection with the needs of the large part of the population, who were either illiterate or who could not read satisfactorily.

Education was one of the African National Congress’ (ANC) highest priorities, as they came to power in 1994. In the same year the different education departments were amalgamated to one single National Ministry of Education, as well as the earlier separate Library- and Information Services. The Apartheid Education system remained until 1993 with the creation of the interim Constitution and later the final Constitution adopted in 1996, in which the right to education is protected (Dahlgren 1997, p.16f). Formally the apartheid education system lasted until 1st of April 1995 (Donn 1995, p.1)

In the *Report of the Committee to Review the Organisation, Governance and Funding of Schools*, presented in August 1995, advice regarding how to achieve unity, equity, democracy and quality in a new education system was given (1995, p.1). Regarding the evaluation of material resources it says (ibid, p.97).

9.4 Many schools, particularly in rural areas, lack the basic equipment necessary for the efficient administration of an institution. Democratic governance and management require fundamental facilities for communication, record-keeping, etc.

9.5 But in many areas the school’s basic educational function itself is severely handicapped by inadequate material resources. Given the deprivation that exists in many rural districts, development plans will have little impact unless accompanied by building refurbishment, reconstruction and the provision of fundamental infrastructural needs such as electricity and water. The provision of basic physical plant, equipment, and materials, together with administrative and professional support, is essential for the development of capacity-building of these school communities to provide learning opportunities of quality.

### 3.3 School libraries in South African policy documents

In “Curriculum 2005- A new challenge to resource managers” (Faasen & Metcalf 1997), the WCED in an interview draws a picture of the new curriculum, which here, together with Curriculum 2005, will be used to give a view of the new outcomes based education. Curriculum 2005 addresses all students, including learners with special needs, students at technical colleges, the Adult Basic and Training (ABET) etc. Having the same system is supposed to help people more easily move between different institutions of education and training with help from the National Qualification Framework (NQF), which is described as “a map indicating all the registered
qualifications in South Africa, the relationships among them and the pathways a learner can follow to fulfil the vision of lifelong learning and development.” (ibid)

3.3.1 Curriculum 2005

Outcomes are defined in the curriculum as the results- which can be either knowledge, skills, concepts or values - of learning.

In Curriculum 2005 the old subjects have been replaced by eight so called Learning Areas. These are;

- Language, Literacy and Communication
- Mathematical Literacy, Mathematics and Mathematical Science
- Natural Sciences
- Arts and Culture
- Life Orientation
- Human and Social Sciences
- Economic and Management Sciences
- Technology

There are also seven so called Critical Outcomes, which represents different skills and run through all the fields of the curriculum. The full name of the Critical Outcomes, which originally were called Essential Outcomes, is Critical Cross-Field Education and Training Outcomes. They are;

- Identify and solve problems in which responses display that responsible decisions using critical and creative thinking have been made.
- Work effectively with others as a member of a team, group, organisation, or a community
- Organise and manage oneself and one’s activities responsibly and effectively.
- Collect, analyse, organise and critically evaluate information.
- Communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written persuasion.
- Use science and technology effectively and critically, showing responsibility towards the environment and health of others.
- Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

Studying the curriculum, one finds that there is no special part in the new curriculum that explicitly deals with school libraries, their norms and standards, even though the importance of a wide range of learning support materials is being frequently emphasised. The only time school libraries are indicated is in mentioning the responsibilities of the Governing Bodies. The Governing Bodies are boards consisting of parents, teachers, the principal etc., which runs the school and decides the entire
school budget. There have though among librarians found to be a strong connection between the critical cross-filed outcome number four “Collect, analyse, organise and critically evaluate information” and school libraries.

Despite the fact that there have been two Revised National Curriculum Statements, 2001 and 2002, and assurances had been made to the national Library Association of South Africa’s (LIASA) School Libraries and Youth Services Interest Group, regarding a more explicit recognition of school libraries, nothing has happened yet.

### 3.3.2 A National Policy Framework for School Library Standards

In early 1996 the need to investigate norms and minimum standards for school libraries was recognised by the Education Department. Then in 1997 a draft policy, *A National Policy Framework for School Library Standards*, was published by the National Department of Education. In September the same year, the document was approved by the Heads of the Education Departments Committee, HEDCOM, as a basis for developing a national policy for school library standards. The Research Working Group behind the document consisted of people from the National Department of Education, the Education Policy Unit at the University of Natal and also from some of the provincial Education Departments. Also provincial representatives, a Task team, a Reference Group and different individuals, organisations and institutions made contribution to the final report. The policy was however not finalised, due to restructurings within the Education Department. (oral information together with *To set the ball rolling* 2002 p.37)

The publication begins with:

> This report represents the first official attempt to look at school libraries as integral to the curriculum in South Africa. It considers the importance of school libraries in encouraging and supporting learning that is based on the use of a wide range of learning resources to create critical thinking. Such an approach is a key characteristic of the new outcomes-based approach to learning and teaching. (*A National Policy Framework for School Library Standards* 1997, p.1, 5)

In a discussion regarding the definition of what a school library is, it is said, that school libraries traditionally have been regarded as "discrete units” within the schools, but that as early as 1945, the American Library Association (ALA) cast the school library as a teaching method. It is established that there is no such thing as one right solution regarding school libraries, but that this must be decided by every school to fit its specific needs.

Regarding school library collections it is said that these shall consist of a variety of media, which have relevance for the curriculum. They must reflect different perspectives and viewpoints” including the experience of disadvantaged and marginalised voices”. Provincial Education Departments are encouraged to formulate clear policies, to help schools develop school libraries which will help to access the new curriculum.

The significant curricular role of library-based resources demands that education planners and administrators cannot regard the school library as a separate optional support structure in the teaching and learning process…. The emphasis on the learner, the inter-disciplinary nature of knowledge, the experiential and resource-based method of teaching and learning
as characterised by the new outcomes-based approach, means that educators and learners
will be using greater numbers of (learning) resources and a wider range than would have
been necessary with previous curricula. (ibid, p.22)

The definition of Information Literacy is introduced with a quotation; “the ability to
recognise the need for information; to find, organise, evaluate and use such information
for effective decision-making or problem solving; and to apply these skills to
independent lifelong learning.” This is very similar to the formulation of the fourth
critical cross-field outcome in the curriculum; “collect, analyse, organise and critically
evaluate information”. (ibid, p.22f) It is stated that this “implies a significant shift so
that information skills are no longer solely the domain of the library, but the domain of
the curriculum.

In Curriculum 2005 two types of outcomes are mentioned; specific and critical cross-
field outcomes. The difference between the two different types of outcomes is explained
as ”Critical cross-field outcomes express the intended end results of education and the
specific outcomes are context linked and based on learning outcomes of the individual
areas of learning” (ibid, p.19f). Regarding this is established that interaction with
learning resources is necessary if learners shall be able to achieve the different
outcomes in accordance with the new curriculum. Further, that teacher-librarians have
an important function at all school levels as promoters of “school libraries institutional
support structure” to help students achieve the wanted outcomes.

An important point is made in connection to Loertscher’s Taxonomy of Library
Services:

It is frequently assumed that the traditional school library, such as found in former model C
schools, is inherently and qualitatively superior to other library models. However,
Loertscher’s taxonomy of library services … identifies that this assumption is simplistic
and erroneous. For example, at Loertscher’s Level One there is a library in the school but
educators do not use the services and/or collection. It is only at Level Five that the teacher-
librarian is proactive and, together with the teacher, prepares for access to the curriculum.
Thus, the mere existence of a school library is not an indicator that quality teaching and
learning occur in the classroom. … Loertscher’s taxonomy suggests that the teacher-
librarian - not the physical and spatial norms - is the critical component of a library that
contributes to quality teaching and learning at school. (ibid,p.46, 81)

Also mentioned is the importance of revisiting teacher development in order to better
prepare educators for outcomes-based education and make them understand the
importance of library-based resources ”in order to achieve the desired outcomes”.

Increasing the level provision in response to redress priorities will not be realisable unless
there is a concomitant development of teacher-librarians, school managers and teachers.
These are the people who will animate the new school curriculum. (ibid, p.71)

With the South-African Schools Act of 1996, the government became responsible for
the funding of schools. This responsibility was however transferred to the Education
Departments in the Provinces, in accordance with the Constitution of South Africa
1996. There exists though frustration among school and regional level managers
regarding this system of financing. Some problem that are reported to be common in
many of the provinces are for instance; confusion who is responsible for the financing
of curriculum-related resources; that the annual budgets seldom have earmarked funding for library-based resources and if there is, these are often reallocated when the Departments have overspent in other areas or do have inadequate funds; lack of clear communication regarding funding policies etc (ibid, p. 66f).

For the Provincial Education Departments the framework suggests two different roles; the providence of a library advisory service to all public schools and a regional library services for schools lacking school libraries or having dysfunctional ones (ibid, p.45).

It is established that the provincial Education Departments do not have the economic possibility to immediately provide every school with a traditional school library, in order to overlap inherited disparities and create equity between the schools in access to library resources. It is pointed out that no library model will be the sole solution in accessing the new curriculum, but also other collections in the schools will be used. With this background two different approaches on how to redress the situation are presented. One is called “The incremental approach” and claims that a certain amount of schools receive a centralised, traditional school library every year until all schools finally will be equipped. The other approach, “The temporary or transitional approach”, which is the one recommended, claim that schools should be able to choose between different models. This approach also involves the participation of the Governing Bodies and emphasises flexibility and diversity and encourages schools to find other financing forms in the communities, besides the state funding. Different suggestions on how to find more financing than the money received from the Education Department are also given. It is said:

In the light of the enormous backlogs in education and the conditions in underdeveloped rural areas and townships, the limits on departmental budgets, and the moral imperative to provide learners with access to at least a minimum of library-based resources sooner rather than later, and with there being interest groups and private enterprises able to be partners with schools, this discussion document recommends the transitional approach. (A national policy framework…1997, p.36-37)

One thing proposed in the document is, that the provincial Departments should offer support to schools for several different school library models (ibid, p.3f). Then seven different possible school library models are presented (ibid, p.34ff). Which one of the different library models that is appropriate to a special schools financial, human and material circumstance is to be decided by the Governing Body of the school together with support from consultants from the provincial Education Department. The provincial Education Department also has the main responsibility for providing schools with learning resources.

The document further establishes that;

The South African context is historically characterised by differentiation and disadvantage, not only racially-based differentiation, but also by class, gender and spatially in terms of the rural/urban divide and access to resources. It is important to develop framework for standards if school libraries are the critical point around which an outcomes-based curriculum will be accessed. In terms of regulatory legislation, South Africa’s Constitution empowers and gives the national government precedence over provincial legislation. Common standards will eliminate, or at least minimise, unevenness across provinces. (ibid, p.8)
Genevieve Hart, Senior Lecturer at the Department of Library and Information Science at the University of Western Cape, establishes though, in commenting on the intentions of LPYL, to build up different school library models described in the National Policy Framework for School Library Standards, that this is “a document which has apparently since been shelved by the government” (To set the ball rolling 2002, p.3).

3.4 Some opinions about Curriculum 2005

Genevieve Hart has in a study focused on the information literacy education in disadvantaged schools (1999). Her initial aim was “to explore the potential use of project work [encouraged by the new South African school curriculum with its emphasis on continuous formative assessment] for information literacy education.” (ibid, p.78) The purpose of the study did however shift after a while “to exploring the gaps between curriculum policy and classroom practice. An understanding of these gaps was found to be crucial to any future planning for information literacy education.” (ibid) She points out that information handling skills in the new curriculum is identified as one of the eight critical cross-field outcomes and that the WCED “allocates one period a week to information skills as well as recommending that information skills should be an ‘integrated part of teaching and learning approach’.” (ibid, p.79) She also refers to the often seen close connection between project work and information skills. She says that “significantly, the Western Cape Interim Curriculum argues that the absence of a school library should not preclude information literacy education” (ibid), this while less than a third of the schools have a library of some kind. She mentions that a national survey, done in 1986, showed that while the former white schools had 10 library items per pupil, the coloured had 2.5 and the African schools only 2.4. (ibid) Hart points out in her study that a gap exists between what is really happening in schools and stated policy. She means that teachers do not always do what they think they do. She mentions a teacher who claimed not to see anything new in Curriculum 2005, but claimed that “To me the method of teaching [outcomes-based] has been there all the time.” (Hart 1999, p.90) Hart says, “These gaps show how the policy statements in the new curriculum, which recommend, for example, continuous formative assessment, can become mere rhetoric if teachers lack insight into their underlying pedagogical aims … teachers might discard new methods if they do not suit their circumstances.” (ibid, p.87) Hart further says that “Constructivist research [Pope, 1993] has revealed the significance for innovation of teachers´ ‘personal constructs’-deeply held assumptions rooted in personal, historical, and environmental factors.” (ibid, p.88) She in this case also refers to D. Pratt [1992], who means that we, in this case the teachers, see things through our “lenses”, which are formed of our own conceptions of what, for instance teaching and learning are. (ibid). Hart quotes a teacher, who says “Somebody from the top says, ‘Listen here, we are going to change the system now to theme work’, which is all they say. They don’t say, ‘Listen here, this is the way to do it’.” (Hart 1999, p.90) Hart concludes that to reach success, it is necessary to begin from reality, where the teachers are. She points out the need for an in-service training program “that encourages teachers to reflect on their practices and philosophies and that, above all, provides ongoing support for them as they experiment and adapt.” (ibid, p.94) “The implications here are that the information skills program of Curriculum 2005, which is at present a skeleton program, urgently requires expansion and promotion and that innovative teacher-friendly learning materials must be developed.” (ibid, p.93)
In an article with the headline “Teachers and libraries- a low priority relationship” (Zinn 1997), Sandy Zinn, at the time of the field study was one of the EDULIS Media advisors, today Lecturer at the Department of Library and Information Science at University of Western Cape, put the question “Why do teachers have such a seemingly misinformed view of the role of libraries and resource-based education?” (ibid, p.46) and “How can teachers and librarians learn to collaborate more closely in the education sphere?” (ibid) She identifies three factors responding to the first question. The first is that many pre- and in-service teachers growing up during Apartheid did not have access to and have therefore not developed a relation to any library culture. The second factor identified is “the lack of a compulsory module of school librarianship in teacher training courses.”(ibid) She here refers to several South African authors, Bawa, Fredericks, and Radebe, who earlier have cited the same observation. The third and last factor is “the exam-directed curriculum and its attendant problems.” (ibid)

Zinn refers to Sandra Olen, who emphasis the importance of integration of information literacy into the subjects, to “make libraries pivotal in the curriculum” (ibid)

Zinn further establishes that “It would be useful for public librarians to learn about the new outcomes-based curriculum and the new ´subject´ Information skills.” (ibid, p.47)

Malcolm Venter, school principal in the Western Cape Province, says in the article “Assessing OBE Assessment” (Venter, 1997), that he does not doubt that there are many positive aspects about OBE, but criticises the way the new curriculum has been presented. The state has, according to his opinion, “…not encouraged – in fact, it has discouraged- critical debate on the issue.” (1997, p.4). He finds this ironic, since “…OBE is supposed to encourage critical debate…” (ibid) He further claims that “The fate of the failed RDP will be visited upon OBE and, according to Hartley, also the much-vaunted ´African Renaissance´”.(ibid) He says “In a display of top-down management, the state has decided that this approach to education is the miracle cure which will eradicate all the problems inherited from the apartheid era.” (Venter, p.4) He finds this “traditional is bad and OBE is good” to be simpleminded. (ibid) “One of the basic tenets of OBE, as expounded by William Spady, the so called ´Father of OBE´ … is the elimination of failure.” (ibid) Venter means that with automatic promotion, there is a danger that success will in the reality mean nothing. He points out that behind is “the idea that all children are by nature keen to apply themselves.” (ibid)Venter however suggests that this is nothing but “mere fiction” (ibid) and relates this to adults, who he believes would not work without any pay. He further suggests that “there is a danger that marks will be inflated to cover up the failure of the system.” (ibid)
4. Implementing educational change in Third World

Kingsley Banya has in a study called *Implementing educational innovation in the Third World, a west African experience*, tried to identify different factors impacting on the implementation process of educational change, with focus on the Third World. He does this from a case-study of a project called the Bunumbu-project, in Sierra Leone in West Africa. (Banya 1993, p.1ff). Banya refers to other researchers, who have named the study of implementation as "the missing link". (ibid, p.15)

As mentioned in chapter 2.3, the findings of this study will be examined according to a modified model, based on Fullan/Banya. In this chapter a rather extensive description of Banyas use of Fullans model, his reflection and revision of the same is presented, of reasons given in the above mentioned chapter.

4.1 The Bunumbu project

The population in Sierra Leone consists of 12 different ethnic groups, which makes the country, as most other states today that used to be ruled by colonial governments, ethnically heterogeneous. Almost all the different groups can be found in every province. There are many immigrants from countries with boarder to Sierra Leone. There is also a large group of Syrians and Lebanese, who first arrived as merchants (ibid, p.67) Education was first introduced by missionaries, with "The declared purpose … to fuse a great heterogeneous crowd into one people, with a common language, a common basis for social life, a common religion, and a culture heavily imbued with British values…” Banya continues by noticing that education was from the very beginning functioned as a distinction of class (ibid, p.58). Today, less than 10% of the population speak English (ibid, p.69). Here are many similarities with South Africa to be found: a society consisting of many different ethnic groups, the large number of immigrants, the origin of education and its influences and even the number of the population speaking English.

In 1974 a project named The *Bunumbu Integrated Rural Development* (IRD) project was undertaken in Sierra Leone. The aim of the project was to try to” reverse the trend of increased migration to urban areas, to improve rural productivity and the quality of rural life, and to make the school curriculum pertinent to rural areas…” This was going to be done by training primary school teachers for the work in rural areas, to help change “some of the more dysfunctional consequences of an irrelevant educational system”, which was the system Sierra Leone had inherited from the British colonial government, as they became independent. The education system had been found to be “largely academic, theoretical and irrelevant to the needs of the majority of the population. It did not give cognizance to the daily life and social experience of the people, who lived predominantly in the rural areas (70-80%), where their livelihood was closely tied to agricultural productivity.” Behind the Bunumbu project stood the government of Sierra Leone together with the United Nations Educational Scientific and Cultural Organisation (UNESCO) and the United Nations Development Program (UNDP) (ibid, intro.).

At the Bunumbu Teacher’s College, which is situated ”in the heart of the rural area”, 20 pilot schools within an radius of 20 miles were to be involved in the project The program involved pre-service and in-service training of the teachers and the production
of a new, to the rural area more relevant, curriculum for the primary schools (ibid, intro.).

The purpose of Banya’s study, which was completed in 1986, was to examine the design of the project and to what degree the implementation was succeeded, by identifying obstacles in providing relevant education in rural areas in underdeveloped countries. To analyse the data from the study, Banya in his work first examines a number of different models of implementation, borrowed from different fields, before he decides to use a model” for determining the degree of implementation” (Banya 2003, p.34), drawn from education by M. Fullan (ibid, chapter 2). He later, in a reflection over the model, finds one of it’s strengths to be “the synthesis of research that forms the bases of the model”. Another strength found, is Fullan’s view of factors involved in implementation as ”mutually interactive ” instead of the more traditional view, where they are seen in a linear process (ibid, p.169).” The model’s allowance for adaptability and flexibility, rather than insistence on strict fidelity to initial goals, was able to predict the fact that various changes would take place” (ibid, p.170). The Fullan model seems to be best suited, as it provides the measuring tools needed to evaluate such a project”, he establishes. One thing further is that” Fullan makes distinction between ‘the fidelity perspective´ and ‘mutual adaptation’. The former refers to ‘the extent to which actual use of the innovation/ program corresponds to intended or planned use´. The latter is the modifications added to a program/ innovation to meet the particular needs of the user and the context in which the user is found.”(ibid, p.35f). After having examined every other model, he gives a reason as to why it is not appropriate to use in his case. A model based on social and political changes in society by T. Smith is for instance was rejected because ”Smith’s models insist that implementation is only a problem in developing countries makes it difficult to use his model as an analytical tool since experience has shown otherwise. The model is too narrow for wide application in various contexts” (ibid, p.20). An attempt made by Van Meter and Van Horn to improve Smith’s model is also rejected since “Its focus and application are wider than the specific research envisaged. Furthermore the model’s use of conflict theory as a reason for initiating change does not apply to the project under review in this study” (ibid, p.24), even though Van Meter and Van Horn conclude, as Banya admits that ”implementation problems are not limited to developing countries….. and that, therefore, broader application requires a more comprehensive model” (ibid, p.21). From the education field one more model, besides Fullan’s, is examined. The model is created by K. Leithwood and D. Montgomery. Their model focuses on measuring implementation, more precisely “the difference between program aspiration and actual practice” (ibid, p.33). Banya finds also this model not to be appropriate to use for his analysis of the Bunumbu project and outlines the rejection as follows:

In defining implementation as the gradual reduction of discrepancies between current actual practices, and preferred practices in relation to a program, Leithwood and Montgomery seem to be conceptualising a static terminal stage as the end of the implementation process. This view seems to be reinforced by Leithwood when he states that ‘the identification of desirable end-points or goals for implementation, and stages of development toward those end-point, is a critical task’ … Leithwood and Montgomery also seem less willing to recognise rejection of an innovation or alteration of it as a legitimate professional choice by the teacher rather than obstruction in the implementation process. These reasons make the model not quite appropriate for the study. (Banya 2003, p.34)
4.1.1 Fullan´s model for implementation

In Fullan´s model for ‘determining the degree of implementation’, he first presents four main elements, which he refers to as box A, B, C and D.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Change</td>
<td>Factors Affecting Implementation</td>
<td>Its use in Practice</td>
<td>Outcomes</td>
</tr>
<tr>
<td>A new program or model</td>
<td>Planned and unplanned factors affecting implementation</td>
<td>Implementation</td>
<td>Achievement Attitude etc.</td>
</tr>
</tbody>
</table>

He states, that” to assess the degree of implementation, the change has to be defined (A) and compared to what happens in practice (C). There are other factors, however both planned and unplanned (B) which influence the change and hence outcomes” (ibid, p.34)

Fullan than posits “that there are four potential kinds of change: the possibility of using new ´materials’; structural changes; new teaching approaches; and the possible incorporation of new or revised beliefs (philosophical pedagogical assumptions)” (ibid, p.36). He identifies 15 factors, which he says relates to implementation and divides these into four areas. These factors can, depending on whether they are present or absent, be either barriers or facilitators. The areas and factors are: (ibid, p.90)

A. Characteristics of the Change
   1. Need and relevance of the change
   2. Clarity
   3. Complexity
   4. Quality and practicality of program (materials, etc.)

B. Characteristics at the School District Level
   5. The history of innovative attempts
   6. The adoption process
   7. Central administrative support and involvement
   8. Staff development (in-service) and participation
   9. Time-line and information system (evaluation)
  10 Board and community characteristics

C. Characteristics at the School Level
   11. The principal
   12. Teacher-teacher relations
   13. Teacher characteristics and orientations

D. Characteristics External to the Local System
   14. Role of government
   15. External assistance
Banya points out, that it is important to understand that these factors are “interrelated and interdependent, and one determinant is probably only effective if several others are present.” (ibid, p.91).

4.1.2 Banya's findings of the Bunumbu project

In the evaluation of the Bunumbu project, Banya identifies and discusses several issues;

One problem found, was that “the educational system was seen to be divorced from the daily lives and experiences of the people.” (ibid, p.141; cf. Hart, 1999:1, 87-96; Dealing with Diversity… 1998).

Another difficulty was “the vagueness with which many of the objectives were phrased”, which, he says “made it difficult for the implementers to know what was to be done” (Banya 1993, p.142; cf. Hart, 1999:1, 87-96). Banya finds that in the case of Bunumbu, “It was only toward the end of the first phase of the project that roles and organisational structures were defined.” (Banya 1993, p.156; cf. Haycock 1998)

Teachers did not know exactly what type of education they were expected to give. “It took time and many attempts to translate the objective into practical terms” and “… Many of the teachers found it difficult to change their formal ways of teaching to a non-formal one…” (Banya 1993, p.149; cf. Brown 1998, p.36f)

Another thing criticised by Banya, was the exclusion of some of the implementers, for instance teachers, in the planning process. He establishes that needs had been identified by politicians and” Ministry of Education bureaucrats”, without any input by local people. “In the past, the British system of indirect rule ensured that the chiefs seldom could speak for the interests of their people (cf. Dahlgren 1997) and there is no evidence that the independent government has changed this mode of operation.” (Banya 1993, p.151) Banya says, referring to literature on implementation, that even if it stresses the” importance of the participation of those affected by a project (cf. Haycock 1998), the cultural context of a program affects how actual participation is carried out.” (cf. Hart 1999:1, 87-96). Regarding spreading information, he concludes that traditional ways, as for instance putting notices on a staff board, are rather ineffective; since far from everybody read them and the notices often stay up for a very long period of time.

(Banya 1993, p.152)

Further the poor infrastructural facilities are mentioned. (ibid, p.143; cf. Report of the Committee to review…1995, p.97; Brammage 1997)

Inappropriate equipment” that no one knew how to use or more importantly, maintain was a further constraint.” (Banya 1993, p.144; cf. Haycock 1998; Brown,1998, p.36f; Brammage 1997 ).

To achieve the goals of the project, Banya found, more resources would be required and that” it appears that some unwise planning committed to the project to the use of greater resources than the country could be expected to provide.”(Banya 1993, p.147)
He also found that adequate time was not allotted for the implementation” because project sponsors and administrators were keen to obtain quick results.” A new curriculum with a rural bias was expected to be produced and also taught within five years. (ibid, p.147). ”It seems obvious to say that workers cannot work at their best when they are under constant pressure to accomplish tasks by deadlines that do not adequately take into consideration the realities of the implementation context.” (ibid, p.148). He also says that” serious unforeseen obstacles impeded the implementation of the project.” (ibid, p.143)

In successful cases, no systematic evaluation took place, neither was new material resources compared with previous ones still in use. Regarding the attempts at evaluation that had been done, Banya says that” these often elicited positive response even though the converse might be true.” The answers were given to please the authorities and make the schools appear supportive of the project. This was especially true when questionnaires were used to find out how a school was doing…. It was only in informal discussion that frank problems were raised with the researcher and some tutors”. (ibid, p.150f)

Banya with his study also raises questions regarding foreign aid. In the Bunumbu project foreign aid was provided partly in form of equipment, partly as personnel assistance. Regarding the material assistance, Banya claims that” although substantial sums were devoted…it was not appropriate to the projects’ objectives of emphasising rural living and appropriate technology.” He also criticises an expensive building project and says that this did not help ”solve the instructional material problems. The amount spent on the close circuit television and the machines at the Resource Centre could have been used to provide basic school supplies like paper, pencils, ink, chalk, textbooks, and cyclostyle (mimeograph) machines. As suggested by one of the project administrators… it was such basic materials that were needed, not sophisticated imported gadgets that hardly anyone knew how to use.”(ibid, p.153f)

Although Banya chooses Fullan’s model for his analysis and quotes one of his statements, which corresponds well with Banya’s opinions, regarding implementation;” Government agencies have become increasingly aware of the importance and difficulty of implementation and are allocating resources to establishing implementation units, to assess the quality of potential changes, to supporting staff development…” (ibid, p.16), Banya in his final conclusions finds that Fullan’s model” did not fully cover all the problems encountered… The Fullan model does not deal adequately with the process of adoption, because it sees implementation as dominating the process of educational change. The Fullan model gives the misleading impression that the process of planned educational change is clear and logical”. Banya says, that even though Fullan in his argumentation is aware that this is not the case, he does not involve this in his model, which only deals with explicit situations (ibid, p.170ff). The Fullan model was by Banya found not to consider the social, political, and cultural factors, which he finds to be of great importance (ibid, p.172ff).

4.1.3 Banya’s revision of Fullan’s model

Banya’s conclusions results in the proposing of a “modified model of implementation”, where he adds the, according to his opinion, necessary social, political and cultural factors, which he means can ”play a key role in implementation” He names these
"Contextual Factors” and adds them as ”Box E” to Fullan´s model. He specifies them as follows: (ibid, p.175)

**Box E  Contextual factors**

<table>
<thead>
<tr>
<th>Social factors</th>
<th>Political factors</th>
<th>Cultural factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Kin group as primary responsibility &amp; provider</td>
<td>-Chiefs &amp; elders</td>
<td>-Internalized values held</td>
</tr>
<tr>
<td>of security</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-Clan lineage</td>
<td>-Decision-making assemblies</td>
<td>-Beliefs</td>
</tr>
<tr>
<td>-Conjugal family</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-Conjugal family as primary responsibility/provider</td>
<td>-Generalized factors</td>
<td>-Norms of behaviour</td>
</tr>
<tr>
<td>of security</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-Ethnic group/tribe</td>
<td>-Courts</td>
<td>-Mores and folklore’s</td>
</tr>
<tr>
<td>-Human attainments, e.g., wisdom as associated</td>
<td>-Legislatures</td>
<td>-Ritual calendrical</td>
</tr>
<tr>
<td>with experience; wisdom as associated with esoteric</td>
<td></td>
<td></td>
</tr>
<tr>
<td>or specialized knowledge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-Master craftsmanship</td>
<td>-Powers</td>
<td>-Marriage</td>
</tr>
<tr>
<td>-Seniority (especially respect for old age)</td>
<td>Verbal skills (e.g., repartee)</td>
<td>-Puberty</td>
</tr>
<tr>
<td>-Human relationships (social focus, kindness,</td>
<td>-Political leadership skill as</td>
<td>-Age/grade related</td>
</tr>
<tr>
<td>obligations)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-Competitiveness</td>
<td>-Fertility of power</td>
<td>-Associated with</td>
</tr>
<tr>
<td>-Voluntary associations</td>
<td>-Public services</td>
<td>-Ancestral/family</td>
</tr>
<tr>
<td>-Residential groups</td>
<td>-Military</td>
<td>-Integrity</td>
</tr>
<tr>
<td></td>
<td>-Policing</td>
<td>-Pleasing/appeasing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(transportation/ infrastructure)</td>
</tr>
</tbody>
</table>

Banya says, that” Since this work was completed in 1986, I have read almost everything on project implementation both in developing and developed countries. The conclusions reached in my work are as valid today as when I first made them.” (ibid, p.3). Further he says that education in most developing countries is still seen as a way to national development and that political considerations often have a strong influence in selecting implementation strategies. He refers to several recently made studies on policy implementation, on developed as well as developing countries, and says, that these "have shown that policy-makers are concerned with the nature and scope of changes that they consider desirable, but give little or no attention to the actual conditions under which social services are delivered to those who benefit from them.” (ibid, p. 8). Banya
refers to earlier mentioned Smith, when he says that” The problem of implementation was assumed to exist only in developing countries, and infrequently in developed countries…” He then establishes that” This however is not true…” (ibid, p.15).

4.1.4 Banya´s recommendations for developing countries

From the conclusions drawn from the Bunumbu-project, Banya highlights implications, which he submits” as tentative recommendations for future work in developing countries.” He continues” While it is obvious that conditions in other countries will always be different, nevertheless there is reason to believe [from the models of implementation cited in this study] that these are appropriate items to consider.” (ibid, p.156)

He begins with mentioning the complexity of implementation and says that ”… implementation is neither an event that occurs at only one particular point in time, nor a linear phenomenon, but a complex process involving events that interact dynamically over time. Implementation is a multi-dimensional process that may involve changes to education, to organisational structures, to different role performance, to the ways on which knowledge is acquired and applied, and to technology” (ibid, p.156). Banya strongly emphasises the complexity of the implementation process and claims that” we cannot conceptualise implementation in a linear manner. Nor does the identification of barriers to change necessarily improve implementation. Implementation must involve the intricate interaction of individual and specific social structures vis-à-vis some form of change…. Developers of innovative programs must be cognisant of the political, social, economic and cultural setting in which the program is to be carried out…. Implementation is not just a technical problem to be ironed out by the application of resources and rational thinking. If program are to operate as intended, the politics of implementation must be considered together with cultural factors.” (ibid, p.172f).

Banya stresses ”that those who will be concerned with change in the future must be thoroughly prepared to understand project goals, objectives, and the philosophy underlying them, as well as their own projected roles.” (ibid, p.158)

He further emphasises the need for in-service training and stresses how this can help overcome” problems of confusion, complexity and lack of commitment…”. (ibid, p.157) Especially important is the in-service training for unqualified and untrained teachers, he says. (ibid, p.162)

Banya also states that” Some compensation should be given to… teachers who perform extra project duties over and above a normal workload.” This, he suggests, could hopefully prevent the loss of well educated teachers in needing areas. (ibid, p.163)

Regarding financial issues, he claims, that” Where a community does not contribute to the finances of an institution within its boundaries, it may not really believe the institution belongs to it, and may tend to rely on the government to develop the institution forever” (ibid, p.164)

In his further recommendations Banya says that ”If the Acting Inspector/…/ were given the necessary authority, and the full support of government, he might be able, through his position and consequent access to senior bureaucrats, to revise procedures, and to improve the quality of teaching and availability of materials…” (ibid, p.160)
About the budgetary process he states that "If a special budget category were reserved for such expenditures as paper, stencils, and copying machines, then there would necessarily be an accounting of these items and there might not be the present acute shortage of such materials.” (ibid, p.164)

Banya finally gives two recommendations, especially directed to other developing countries, which want to reform their education system. The first is that the teacher education should change at the same time as the education in primary and secondary school. The other concerns the examination system, which he claims ”does not test understanding and application of concepts… A decision whether to proceed to another level at the end of the year is based solely on an hour’s examination in a given subject.” Banya establishes that” The present examination system rewards those who have good memories to regurgitate what the teacher has taught.” (ibid, p.166f)

Finally, Banya claims, that” every adopting unit has its unique socio-politico-cultural factors, that is, its internalised values, beliefs, norms of behaviour, mores and folklores, and decision-making patterns. It is reasonable to hypothesise that the more the members of the unit tend to conform to their customary practices, the more difficult it would be to introduce and implement new ideas or practices.” (ibid, p.176)

### 4.1.5 Summary

Banya studies what he and other researchers find is an overlooked issue and referred to as ”the missing link”, namely the process of implementation. He does this in form of a case-study of a project in Sierra Leone. After having examined several different models of implementation, borrowed from different fields, he decides to use a model drawn from education by M. Fullan in his work on identifying factors affecting implementation. In his conclusions later, he finds this model not to have been completely adequate, since it does not include social, political, and cultural factors. He names these, according to his opinion, as missing necessary aspects, for Contextual Factors and modifies Fullan’s model by adding them as” Box E”. Banya suggests, that Box E” is such a powerful factor that it affects all the other boxes, especially B, C and D” (ibid, p.173). Banya’s critique against the Fullan model is commented also by David N. Wilson, Professor of Comparative and International Education at the Ontario Institute for Studies in Education, who establishes that ”Banya's critique of the Fullan 'innovation model' effectively focuses case study findings upon the shortcomings of this model” According to Wilson, Banya’s ”contributions to the theories of innovation and change have rendered a model developed in a First World context relevant to the unique conditions found in the Third World” (ibid, the foreword).

Fullan’s/ Banyas model is the framework for the simplified model used in the analysis/discussion in Chapter Seven, consisting of the factors found to be most relevant for the questions investigated in this thesis.
5. The Western Cape school library service

This chapter is based on observations and information received during nine weeks following the everyday work at EDULIS, above all the work of the Media advisors and particularly one of them.

Except for the national education department, all the nine south-African provinces have their own, and to a great extent independent, education departments. Each of these departments has their own provincial school library service. The differences between the nine provinces services differs widely, both regarding number of staff, economic resources etc. It is the decision of every education department to decide the extent of the service. In Mpumalanga for instance, the school library service consisted out of one single person, compared with the one in the Western Cape, which is one of the wealthier provinces and which service at the time for the visit had no less than 36 employees. The heads of these nine provincial services constituted the Standing Committee of Heads of Education Library and Information Services (SCHELIS).

5.1 EDULIS

Most of the staff used to work at the old school library service of HOA (the service for white schools), on which the new service was built. A few of them worked for the former school library service for coloured schools. The staff were all trained teachers with further education as school librarians and had at least five years of experience in the field. Out of the entire staff 30 worked at the head office and six out in the field. The mission of EDULIS was to support the management and development of school libraries in the Western Capes about 1700 schools. This was to be done with consideration of the implementation of the new outcome based curriculum. A major part of the resources at the Main office in Cape Town was planned to be located out in education resource centres, as a part of the initiated decentralisation process which aimed to make the resources more available to the users. The first education resource centre, which was visited together with one of the Media advisors, had recently been opened in Oudshoorn, about 600 km east from Cape Town. The centre was run by one staff and equipped with, besides traditional library media, a computer, copying facilities, and new curriculum related materials.

At EDULIS there was an Education Library, EDULIB, which at the time of the visit was in fact two separate libraries, which were going to be amalgamated into one during 1999. One of the libraries held educator materials and the other one learner materials. The libraries were held open all weekdays between 08.00 and 16.45 and on Saturdays from 09.00 to 13.00. Both libraries had just been computerised. There were among other things plenty of school library journals from many different parts of the world in the stock. All teachers and teacher-students in the Western Cape were welcome to use the library, either as individuals or take out block loans for their schools. There was however a loan limit of six items. A problem regarding the block loans was that even if the books were sent for free to the schools, they had to pay the costs of returning these themselves which prevented many schools with limited resources to use the service. This had however been addressed and plans were drawn up to include these costs into the budget of EDULIS. Besides the services mentioned, EDULIB offered inter-library loans, photocopying facilities and access to some computerised data bases.
EDUMOD, short for the Education Model School Library, was another section of EDULIS. EDUMOD evaluated learning resources and gave reading guidance. They produced catalogues named “Selected books”, where recommended resources, which could be found in the Model School Library, were reviewed by book selectors. Some examples of catalogues were “Recommended curriculum resource material for secondary school libraries”, “Selected books, Pre-primary school libraries” and “Recommended curriculum resource material for primary school libraries”. In these catalogues were selected lists and bibliographies of books and other materials in different areas. The text on the cover of the lists was in English, Afrikaans and Xhosa, but the reviews and the text inside in English and Afrikaans only, since there at the time was no advisor for curriculum resources in Xhosa. The “Selected books” catalogues contained a list of booksellers, offering the resources recommended by the WCED and any bookseller wanting to be included had to apply to the head of EDULIS. EDUMOD also, by request, assisted schools with cataloguing and classifying.

EDULIS was a departmental service and belonged to the WCED. With help from the different services mentioned, EDULIS offered support, guidance and assistance to the schools in the region in establishing, developing and managing school libraries. In accordance with the, at the time, recently nationally developed and adopted document A National Policy Framework for School Library Standards, this was done in several different ways. EDULIS main obligation was not to provide schools with school library resources, since this was included in the schools one-pot-budget over which the Governing Body decided, but to provide advocacy. Another important task, in relation to the new outcomes based Curriculum, was to offer schools assistance in developing information literacy skills. EDULIS also participated in the WCED’s ongoing development of the new Curriculum.

5.2 The work of the Media advisors

As mentioned, six of the EDULIS 36 employees worked out in the field, assisting the WCED’s almost 1700 schools. Three of them worked as Media advisors for school libraries and three as Subject advisors for information skills. At EDULIS they had a common office with access to a computer connected to the Internet. This was however not much used, since they spent most of their time working practically in the field. Once a month, in connection with the monthly meeting of the entire EDULIS´ staff, all the advisors met to share information, discuss, receive feedback and plan to coordinate their work for the month ahead. From time to time they also invited outsiders to promote the group’s existence. The advisors had divided their working field into the same three regions as the WCED had divided the Western Cape. One Media advisor and one Subject advisor co-operated in one region. As they visited the schools, they worked very much from the present circumstances. Their assistance was available to both more well-off schools and less privileged ones. They though spent more of their time working with the later, since the needs were more urgent there. To visit all schools seemed to be almost impossible, mainly caused by the number of schools as seen in relation to advisors. After every visit to a school, the advisors filled out a, at the time, recently introduced form, containing different kind of information regarding school library premises, furniture, equipment, information about the book stock, what kind of deficiencies there were that one could work with, staffing, the existence of information skills and computer literacy, closest public library and which help and information they
had offered the school. The reports were then duplicated in three samples of which one
was kept for own record, one was handed over to the co-operating colleague and one
was kept at EDULIS.

5.3 The governing of school libraries

As mentioned earlier, a lead in the ongoing democracy process in South Africa had been
to establish Governing Bodies at all schools. The Governing Bodies decided over the
schools entire budget, which included school libraries and library resources and, when
this was possible, the appointment of a teacher-librarian. One of the advisors more
important tasks, was therefore, to have a good communication with the people in the
Governing Bodies, as well as the principals.

5.4 Funding

The reorganisation of the funding system of education had lead to many of the former
model C (white) schools suffering cut downs in their school library services. In the new
system a one-pot budget, over which the School Governing Body decided, was given to
the school, based on number of pupils. There did not exist therefore a special earmarked
budget for school library resources. Even though the same amount of money was spent
on all south-African learners at the time, several of the advisors claimed, that the
inherited differences would take a long time to adjust. Many of the schools lacked
electricity, water and other basic needs and during these circumstances it was not
always easy to convince the principal and the Governing Body of the importance of a
school library and accurate learning support materials, even less, trained staff for the
library. However, fundraising, mediation of donations and contacts with NGOs, like
READ and Biblionef for example, as well as private enterprises and other actors, who
were willing to help with funding in different ways and co-operate, was one important
part of the advisors work. An expression frequently used by one of the advisors talking
to the school staff was” free or cheap”. Almost all of the less privileged schools visited
during the field study were busy with different fundraising projects.

5.5 Physical premises, furnishing and shelving

In the WCED recently built schools, location for school libraries was almost always
catered for. Also in earlier built schools there was usually space, which initially was
earmarked for school libraries. In many cases though, it had been seen as necessary, to
take this space in use for classrooms instead. A quite common solution seen in many
Western Cape schools, were the housing of library resources in storerooms, which were
often rather small. In some schools, often larger ones, classrooms- or parts of these- had
been converted to school libraries. Since security was a major problem in many schools,
especially the ones located in the city areas and in the townships surrounding the cities,
the libraries were often closed and locked with gates most of the time during the school
days. Another reason for the libraries being closed was that the persons responsible for
the libraries were in most cases full-time class teachers, busy with their own classes. A
problem in many of the previously disadvantaged schools was that there was no special
funding for library shelving and library furnishing, as this had to be taken out of the
one-pot-budget, which for many schools that lacked basics was impossible. Here the
Media advisors, when they had the opportunity, acted as mediators of donations of furniture from different enterprises, of which examples were seen in several schools. For schools who lacked school libraries of their own or when these were insufficient, one possibility advocated by the advisors, was to establish good relations with nearby public libraries. This had not been without problems though. Learners in large crowds suddenly entering a public library to do research, according to the new outcomes based curriculum, meeting unprepared librarians created not surprisingly some problems. Even though a close co-operation existed between Cape Town City libraries and EDULIS and workshops with the staff at the public libraries were conducted by one of the advisors with the aim to help the staff deal with the crowds of learners, this had not been enough. In Spring 1998, after WCED’s attention had been drawn to the problem of lack of support from teachers,” circular 103” was created. The circular was constructed by the WCED and sent out to all schools in the province, with the intention to improve the contact between the public libraries and the schools. Another problem preventing learners from using public libraries was in some cases, that the parents did not want the responsibility for the library resources borrowed. Some children also refused to go to the public libraries, claiming they are afraid of the widespread violence in the surroundings. This seemed to be more of a problem in the city townships than in the countryside.

5.6 School library resources

Some of the more privileged schools that were visited had school libraries equipped not only with books of good quality, sufficient and relevant library resources/ learning support materials, CD-ROM etc., but were also equipped with very up-to-date information technology, easily accessible for the students. Some of the schools even had there own designed computerised library catalogues. At one of the top schools, which was private, I was told that from the next term, they would start to equip the students with a laptop computer of their own, which they would then always carry with them during school days. At these schools I almost never saw any black and very few coloured students, even though all schools by then were by law open to everyone.

While there existed plenty of books and other library resources in English, there was a lack of books in Afrikaans and the different Bantu-languages. Even though there existed books in English, there was a problem that these books were often written and produced outside South Africa and it was therefore not always easy for South-African children to recognise and identify themselves with the people and stories being described.

5.7 Staffing

In most of the black and coloured schools visited, the school libraries had been built up by one single person, only in few cases were several persons involved. This person often did all the work in the library on her/his own, usually in their free time, except for some cases, where the teacher had a couple of hours reduction in her/his teaching obligation. It was not unusual that people from outside the school, in several cases retired librarians, volunteered to help out and some times even run the library. Several of the visited schools had established school library committees, where students helped out running the library. Some schools, which had school libraries but which were not in use discussed the possibility with the Media advisors to let some students be
responsible for the library. The Media advisor encouraged the idea of having students assisting, but advised the schools, not to let the students run the school library completely alone, since this had been tested several times in different places, but without any major success.
6. Description of some Western Cape school library contexts

In this chapter different schools, school libraries and school library-solutions seen in the Western Cape Province, preferably in disadvantaged areas, will be described. Out of the approximately 35 schools visited, examples have been chosen with the aim to display some of the different problems and barriers one deals with when trying to establish and develop school libraries and provide these with appropriate resources. The schools, school libraries and school library solutions will first be presented separately, since several of the problems dealt with are connected to specific circumstances and need to be understood with context. After each presentation a comment will be made. By request from the Western Cape Education Department (WCED), the schools and the people are being treated anonymously and have assumed names.

All of the described schools have been visited together with the EDULIS Media advisors in their work except for one, Hilly High. At Hilly High an entire week was spent since this was one of the project schools of LPYL. This is the reason for the more thoroughly presentation of this school. The school library situation found in the different schools will then later be discussed in the analysis.

6.1 Hilly High - an expanding library without budget

The school was situated in a township approximately seven km outside a smaller town about 500 km away from Cape Town. It was a big yellow school-buildings made out of brick which had began to be built a few years earlier and which now could be seen in many places around the province. A fence surrounded the whole school area and the gates were usually locked, even during the schooldays. The school hosted about 860 pupils from grade eight to grade twelve. The pupils came from the surrounding township and from another township on the other side of town. In the other township there was a primary school. The pupils were taken to the schools by a school bus.

Since this school was originally built to be a primary school, no library area was included in the construction. Now however, the school had a rather small but nice library and a larger one was planned to start taking form during 1999. As the old separate Education Departments and their Library and Information Services had amalgamated into one unit a few years earlier, some of the stock from the old Department of Education and Training (the ex-DET), was donated to the school. Mrs C, a full-time teacher at the school, had then, as the boxes with what she described as "wonderful books" arrived from the ex-DET, located an old storeroom and turned it into a library. The storeroom had been filled up with old outdated textbooks that had been donated to the school and which she first had to clean out. She then rearranged the shelving, trying to make the best out of existing resources. Although there was not much space, she had managed to make room for some seats for reading and studying. Sealed envelopes that had been cut in halves, stamped with rubber and then filled in with each students name and class functioned as member cards pockets. The pockets were kept in envelope boxes, which functioned as issue trays. To be able to keep control of the stock, Mrs C had also created her own Library rules, which among other things allowed the students to borrow only one book at the time.
The stock was, besides the already mentioned donation from the closed down and reorganized DET-department, built up from books donated to the present WCED, donations from people in the local area and from a huge book donation of over 30,000 books that had been given to the regional library service. According to the Media advisor, a large part of this huge donation was unfortunately useless, since the books were old, out of date and in bad shape. There was a lack of fiction books in Xhosa, which was the mother tongue of nearly all the students in the school. In the stock, she said, there were also some unsuitable books that would be removed. Since the work of making the books ready for the library (cataloguing, stamping, providing them with cards and pockets and entering them into the accession register) was quite time-consuming, she had advertised for help. She now received help from a lady one morning every week. Newspapers and magazines were donated by the public and by the staff.

Mrs C held the library open every day during the only half an hour break of the day. She said that an area which was especially popular to the senior students was the vocational guidance and tertiary study information section. Here the students could find information about further studies, different professions, scholarships, different colleges and universities etc. One Media User Guidance period, which included visits to the library, was held once in a seven-day cycle for the grade eight and nine students.

As mentioned earlier, a larger library was being planned and some preparations had already been made. The principal had agreed to allow the use of the school hall for the library, as it had grown too small to hold all the students of the school. The main problem, however, was that there had not been and was also not going to be any budget for the library. To address this, the Media advisor had managed to locate a company in Cape Town, which was willing to donate some of their old furniture. Mrs C. had then contacted a local company in the furniture business, which had agreed to bring the furniture back from Cape Town when they would otherwise return with an empty load. The school had been waiting for the transport for several months and it happened to arrive during the week of my stay.

The school also had a fund-raising committee, which had promised to help out financially. Mrs. C. also had several ideas herself how to collect money for the library. The governing body at the school was still busy establishing itself and had therefore not yet made much contribution to the establishment and development of the library. They had though, together with the principal, promised to help out with putting the shelving from Cape Town in order. Mrs. C had just started a school library committee, consisting of four persons. She was thinking of including some of the grade ten students, since they were still going to be around the school for a couple of years. Maybe, also representatives from all grades later. She was very anxious about the Media advisor coming to the school and wanted them to have a talk with the teachers about not focusing so much on textbooks, which she found to be a problem.

Mrs C. could see several advantages with the larger library that she was busy planning. One benefit was that it would be possible to gather whole classes for teaching and research in the library at the same time. It would also provide space for information technology equipment. Mrs C had a vision, that the library in the future would be accessible also for other institutions and bodies in the disadvantaged area where the school was situated.
Comment

As in many other schools in under resourced areas the existence of the school library was dependant on the initiative of a single full-time-teacher, who to great extent ran this alone. In this case, as in several other schools visited, the person in charge received assistance from an unpaid person outside the school. Some of the persons helping out in the other schools were actually retired librarians or had some kind of library qualification. Many though lacked experience and had to rely on the assistance offered from the Media advisors.

In the reviewed budget system for schools there was no separate budget for school libraries, but the schools received one pot which was to include everything, for instance “textbooks”. Mrs C explained how difficult it was to argue about transferring some of the money that until then had been used on textbooks to other learning resources. The teachers minds were very much focused upon textbooks, she claimed. No budget was planned for staff or for library resources, which according to the new curriculum was the responsibility of the Governing Body. Since this for different reasons was not yet functioning well, no particular support had been given in the establishing of the library. A school library committee, which was also the responsibility of the Governing Body, had however just been initiated on the initiative of Mrs C.

The location of the library in an old storeroom was a quiet common solution in older schools. I was told that in the construction of the more recently built secondary schools, appropriate room for school libraries had been included. The reason that this school lacking such an area, although it was recently built, was that the school originally was planned to be a primary school.

The lack of fiction books in Xhosa highlights another problem. While there existed plenty of both fiction and non-fiction books in English, there was a lack of the same in the indigenous languages and in Afrikaans.

6.2 Eden Primary - a farm school where the books used to freeze in winter

Eden Primary was a small farm school high up in a mountain area about 60 km away from the nearest town and several hours from Cape Town. To get there, one had to travel a long distance on gravelled roads. The school buildings were simple and in a rather bad condition. It was a non governmental school, provided by the farmer, for whom the parents to the children in the school worked picking apples. They also lived at the farm. There were also children from five other farms coming to the school. Transport for the children was provided by the farmer, usually with some kind of pick-up. It was a primary school with approximately 130 children from grade one to seven. Until the year before there had been four teachers, including the principal, but as he resigned and one of the teachers took over, one post had been left vacant.

One of the classrooms had been divided into two parts. This had been done by hanging up some sheets from the roof. One part now functioned as a library and in there stood a cupboard, in which the books were kept. It had been donated in Cape Town and the Media advisor had, put it on a trailer and pulled it up on the gravelled roads to the school. Before this the books used to lie on a table and a bed in the room. Between the
wall and the roof there was a gap and in the winter when it snowed, I was told, the books would freeze and be destroyed. This was the immediate reason for the Media advisor bringing the cupboard to the school. Now they could close the doors to the cupboard to protect the books from the snow and the wet.

The Media advisor told me that she would try to find some other shelving and suggest that they took the doors away from the cupboard, so that the books would be more available. In this school there was not even a type writer for the administration.

Comment
This was just one of many farm schools in the area and in South Africa. Like most of them it was a non governmental school provided by the farmer. The buildings and the equipment were old and in bad shape. As mentioned earlier, these schools were regarded to be the poorest and worst of in the country.

Because of the location of the school there was no possibility to use a public library, which otherwise was an option encouraged by the Media advisors for under resourced schools in cities and villages. For the same reason it was also not an option to make use of the offers from EDULIS to take out block loans. Even if the school had the possibility of getting the block loans sent to it by post, the cost of returning them was to expensive.

The Media advisor had tried to persuade the town clerk in the community to let up a book bus donated from Japan, to function as a mobile library in the under resourced areas of the community, which seemed to be an appropriate solution for the faraway located farm schools. He had though changed his mind several times, and as I had the opportunity to listen to his argument during a visit, he explained that there was no need for a book bus, since a library was planned to be built in the township outside the town. How Eden Primary and other farm schools 50-60 km away up in the mountains would be able to use this remained, after a long discussion, unclear.

6.3 Puddle Public Library – supporter of ten schools

Puddle Public Library was a public library in one of the less privileged areas in Cape Town. The library was rather big and there was plenty of space for reading and studying and also several computers. This library had established contact with no less than ten schools in the surrounding area, which they were supporting. Every school had a special contact person at the library, which they got in touch with and informed, before they came to visit the library to find materials for special assignments. These contacts at the schools used a form, produced by the WCED and handed out to all the principals in the provinces schools. The form arrived together with a circular, called 103, in which the schools were encouraged to use the form, in order to make the situation easier for the public libraries, on which the pressure had increased due to OBE, especially in under-resourced areas where the schools lacked libraries of their own.

When I was visiting, the Media advisor was holding a workshop with some students in grade nine to grade eleven about information skills. She normally worked only with teachers and staff in schools, but during holidays she sometimes held workshops with students in co-operation with public libraries, which was the case this time. The library staffs seemed to be very interested and were attending the workshop as well.
Comment
The support system Puddle Public Library had worked out with the schools in the surrounding area was very impressive and seemed to function well. Unfortunately most public libraries in disadvantaged areas were either absent or heavily under-resourced, which prevented a potential co-operation with needing schools. The schools in this case, however, used the circular 103, which had been sent out by the WCED together with an urgent request to use this in contact with the public libraries, to make their working situation easier. Beyond the pressure from schools without school libraries of their own, several other factors increased the pressure on the public libraries, such as for instance the previous year’s cut downs on school libraries in some schools and the new investigative learning-method which had began to be introduced.

6.4 Roberts´ - a top school with the latest Information Technology

Roberts´ was an independent school, largely financed by school-fees and one of the very top schools, according to the Media advisor. The school was situated in Cape Town in beautiful buildings and had a big and appealing school area. It was a single-sex school with approximately 600-700 male students from grade one to grade twelve. Most of them came from wealthy families, were children of foreign diplomats etc. The school also had six exchange-students.

The school had a full-time-librarian, who showed us around in the library, which was spacious and well equipped. There was plenty of space for studying and access to computers. The library had a computerised lending system and also its own intranet website, for which the librarian was responsible. Near, though not immediately connected to the library, there was a very well equipped computer-laboratory. At the moment they were busy installing the latest ISDN-technology. The librarian informed us that from the following semester one were gradually going to introduce the using of laptops among the students. As the first step 160 of the students would carry their own laptop with them during school days. The estimated cost of each computer was 14 000 Rand and expected to be financed by the parents.

Comment
This was one of the few schools visited who had a full-time-librarian. As described above, the facilities offered at the school were quiet exclusive.

Just like Eden Primary and every other school in South Africa, this one received a certain amount money each year, based on the number of pupils. The largest part of the schools activities were though financed by school fees. Most of the pupils in South African schools, even in the rather poor ones, had to pay school-fees, even if these were of very different size. At schools like Roberts however, the fees were quiet high. The resources and the information technology used in this school library, and also in some other better off schools visited showed that much of the knowledge and equipment needed to introduce the new investigative curriculum in South African schools existed within the country.
6.5 Guntrum High - Library and shelving but no books

This school was situated in one of the townships in Cape Town. There were 1400 pupils and 39 teachers, out of which 19 were temporary employed. The school was housed in modern, newly built brick buildings. A special room with a smaller storeroom beside it was built for the library. The rooms were equipped with shelving, but there were very few books. The Media advisor had received a request from a school overseas to help them find a partnership-school and had decided to ask this one if they were interested. The schools would be involved in a project with each other for a year and Guntrum High would receive funding for e.g. computers, so that the students would be able to communicate through e-mail. The Media advisor first presented the request to the principal and then to the school library committee, for which a young mathematics teacher was in charge. They approved the idea. The Media advisor encouraged the school library committee to check the stock and prepare the books for being use by classifying and cataloguing them. She said that they could always call EDULIS to ask for help, if they were unsure how they should classify a book. In South Africa classification and cataloguing of books were done by each library.

Comment
The school had a spacious library area, which was already prepared with shelving. In some of the similar schools, where a school library had been included in the construction, the schools had chosen to use this as a classroom instead, since they often housed more pupils then the building originally was intended for, but not here.

There was though a huge lack of library resources. Regarding the offer about a partnership project with another school I heard about several similar projects. Some partnership projects between South African schools and schools overseas could be found and read about on their own websites on the internet.

6.6 Peters´ Primary - Beautiful books but no shelving

Peter’s primary was a small primary school in a less privileged area in Cape Town. As we arrived some elderly women were sitting outside selling sweets to the children, who had a break. One child was serving the other children soup in mugs out of a big bucket while the rain was pouring down. The Media advisor told me that the schools in very poor areas tried to give the children bread, peanut-butter and sometimes soup for lunch. The school was housed in one of these old prefabricated buildings, which I by then had begun to recognise.

One classroom was, as the Media advisor did put it, hopefully going to be a library. There was however also some competing interests for using it for e.g. music-lessons. The room was quite full of books; on benches, on chairs, in a few rickety shelves and on the floor. Some of the books were lying on the floor along the window where the rain was coming in. The Media advisor suggested that they should put the books in plastic bags, so that they would not be destroyed. She then started to help moving the books away from the window and the floor. Many of the books were brand new and of good quality, as for instance several encyclopaedias. A major part of the books had been donated from an International Book Providing Agency called Biblionef, which recently had established itself in South Africa through a permanent book depot in Cape Town.
Comment
Although the pupils and the school were found in rather poor circumstances this school had been lucky and received a large donation of new and useful library resources from the organisation Biblionef. Large donations from Biblionef were also found in several other schools visited. I was told that South Africa was only one of 35 developing countries, in which this organisation worked with partner organisations, trying to distribute needed reading materials. Books, which were new or unused, were donated to Biblionef from publishers in the countries. One of the Media advisors told me that this organisation would prefer to select three schools to receive 100 books each instead of 100 schools receiving three. (Biblionef in South Africa is one of nominated candidates for 2006 year’s Astrid Lindgren Memorial Award, ALMA, which is the world’s largest award for children’s and youth literature and the second-largest literature prize in the world).

In this school another problem was visible. Beautiful resources existed, even if there was not much shelving, but nobody had had the time or interest in making the books ready for use or at least preventing them from being destroyed. Nothing had happened since the Media advisor last had visited the school, which was quite a long time ago. This showed how much the school libraries in under resourced schools were dependant on having interested teachers who were willing to volunteer their free time.
7. Analysis and Discussion

The purpose of this study was to see if there were differences in the school library situation between various, preferably in less privileged, schools in South Africa and what factors there were, influencing the process establishing and developing school libraries, in order to meet the requirements of a new outcomes based education. The investigation was based on a nine-week field study in the Western Cape Province, on official policy documents concerning school libraries, the incorporation of later published evaluations of LPYL and reviewed literature on the topic. The findings will be analysed according to a simplified model (see below), based on Banya’s revision of Fullan’s model (described in chapter 4), consisting of factors affecting implementation in order to try to answer the initial questions. Because of the extent of the model, the large amount of empirical material and the limits of this thesis, a limitation and concentration upon the factors found to be most relevant will be made. The simplified model consists of the following factors:

Box A: Characteristics of the change

1. Need an relevance of the Change
2. Clarity
3. Complexity
4. Quality and practicality of programme

Box B: Characteristics at the School District level

5. Central administrative support and involvement
6. Staff development (in-service) and participation

Box C: Characteristics at the School Level

7. The principal

Box D: Characteristics External to the Local System

8. Role of government
9. External assistance

Box E: Contextual factors

Are not being categorized

The specific questions were:

1) Is the situation of various school libraries different and what is the basis for these differences?
2) What factors influence the development of school libraries, both practically and in relation to the implementation of new educational approaches?

3) What are the possibilities of development of school libraries in the Western Cape Province?

As mentioned earlier, Banya points out that it is important to understand that the factors in the model are” interrelated and interdependent, and one determinant is probably only effective if several others are present.” (Banya 1993, p.91)

7.1 Box A: Characteristics of the change

1. Need and relevance of the Change

The only time school libraries are explicitly mentioned in Curriculum 2005 is in the mentioning of the responsibilities of the School Governing Bodies. The lack of emphasis regarding school libraries in the curriculum must be seen as a major issue and a key factor strongly influencing almost all of the other factors in the model. Since the Governing Bodies are the ones deciding the schools budget, it is essential that they possess an understanding of the educational importance of having a school library, especially with the introduction of the new curriculum. The vagueness, which in policy documents is often a way of pleasing everybody, makes it difficult for teachers, principals and the School Governing Bodies to understand the benefit of prioritising school libraries and trained staff. Leach, in the evaluation of LPYL, notes regarding the Governing Bodies that while these “would support libraries in principle ‘the reality is that sport and other related social activities are still regarded as superior to libraries´ ” (1999 p.2). My impression from the field study was that the lack of educational arguments for school libraries in the curriculum to a in large extent made the existence of school libraries heavily dependent on enthusiastic teachers performing an extra work load, voluntary workers, external funding in form of donations, partnership projects, NGOs, foreign aid etc. Even though many of these stakeholders obviously made a valuable contribution, which should not be underestimated, there were also problems related to the reliance on temporary external support for permanent activities. The risk that the school library only existed as long as there was an on-going partnership-project with some other school or organisation overseas, or as long as the voluntary worker kept coming to assist the often single full-time teacher in charge etc., counteracted in many cases sustainability. Boxes of books waiting to be catalogued and classified before being put into an accession register, which was seen in many schools and which the Media advisor told me often had been waiting for quiet some time, was evidence of the consequences of depending on voluntarily, often untrained staff, if staff at all. The problem with cataloguing and classifying could also be considered to be an organisational task, which could have been eliminated if this would have been done centrally. The indirect signals as a consequence of the lack of emphasis in the Curriculum, could easily be interpreted as school libraries not being necessary or important and that anyone could run them. Professionals know that this is not the case, but as mentioned earlier, a major problem is that this awareness often stays within the group of professionals. The conscious ongoing work, lobbying and placing some of the Media advisors into the WCED curriculum development groups was though being done
by the Head of EDULIS. “To be enduring, change has to be institutionalised”, Cross, Mkwanazi-Twala and Klein concludes (Dealing with diversity 1998, p. x). Also the Provincial Heads of Education, Library and Information Services (Leach 1999, p.6) stresses the importance of sustainability. The dependence on external contributors, partly due to lack of emphasis in the curriculum, does not seem to be an entirely fruitful way of reaching sustainability and quality.

2. Clarity

In Curriculum 2005 School libraries are, as already mentioned, only indicated by mentioning them as the responsibilities of the Governing Bodies. There has among librarians seen to be a strong connection between the critical cross-field outcome number Four, “Collect, analyse, organise and critically evaluate information”, and school libraries. There is though no special part in the new curriculum which deals with school libraries, their norms and standards, even though the importance of a wide range of learning support materials is being frequently emphasised. The National Policy Framework for School Library Standards, however, points out the role of the school library as a teaching method and promotes integration of school libraries into education. This document has though, as mentioned earlier, not been finally adopted or as Hart put it (chapter 5.2) “shelved by the government”. Alm, in her evaluation of phase two of LPYL (2002, p.26) concludes that one structural issue preventing full success of the projects objectives was that “the role of school libraries has not been enhanced in the new curriculum.” My impression during the field study was that the lack of clarity often made it difficult for principals and teachers to fully understand the relevance of prioritising the school library out of educational motives. Many of the teacher-librarians in the disadvantaged areas explained the difficulties arguing for the transfer of money from the one-pot-budget to library resources. The frustration concerning the teachers focusing on textbooks noted by Mrs C at Hilly High is also noted by Leach in his evaluation of LPYL (1999, p.2). Hart establishes regarding Curriculum 2005 that, “There is no explicit link made between this Information Skills Learning Programme and access to reading, information & learning resources (otherwise known as library resources). The result was that the role of school librarians was invisible – and increasingly hard to justify in a stringent economic environment”. (To set the ball rolling, p.8)

3. Complexity

The Media advisor’s free and flexible way of working from present situations, including the staff’s understanding of and attitudes towards the school library, seemed to be crucial and in accordance with Banya´s establishment, that implementation not being a linear process just to be ironed out. In the evaluation of phase one of LPYL, Dick also gives credit to the LPYL working group for its open and flexible way of working, the subsequent revision of the Business Plan and its readiness to “adapt the Project to specific situations and requests from other participants in different provinces, without compromising its central objectives.” (1999, p.11f). Alm though notes that in the evaluations done by the South-African participants of LPYL, they missed problemizing and reflecting upon issues and strategies for implementation (2002). Leach’s evaluations also point out that “a number of problems were encountered during attempts at implementation” and that “mechanisms still had to be worked out” (1999, p.4).
4. Quality and practicality of program

The curriculum stresses the importance of access to adequate learning resources. The main obligation of EDULIS was to offer support, guidance and assistance to the schools in the Province in their work with establishing, developing and managing school libraries, not to provide the schools with resources, since this was supposed to be included in the one-pot-budget. In Leach’s evaluation, however, one of the provincial Heads claims that the major part of the schools contacting the Media advisors, did this “concerning their inability to get OBE underway due to a lack of learning resources” (1999, p.5). Hart points out that, “Teachers had been asked to make fundamental changes to the way they teach but there had been no accompanying support in the way of resources.” (To set the ball rolling, 2002, p.9)

A related problem was the lack of non-existing media in the indigenous languages and in Afrikaans. Possible reasons for this might be Afrikaans being a fairly young language compared to English and that the oral tradition has strongly dominated the indigenous cultures. Further, it may not be economically profitable for the publishers to publish books in several of the indigenous languages, since the books probably could only be expected to be sold in quite small editions. The English literature already existed, and could be imported from abroad. Since one important function of reading, maybe especially for children, is to meet with the reality and receive opportunities to identify oneself, there were problems with the imported English literature, since the children might have difficulties to recognise the foreign surroundings, conditions of living etc. described in the literature. Several persons spoken to were of the opinion, that it did rarely exist any really good literature for children in Afrikaans, Xhosa, Zulu and the other African languages. One person, however, pointed out that some publishers had began to give writers commission, to write fiction books for youngsters on specific topics, such as for instance street-children and problems connected to the their immediate reality, where they would better be able to identify themselves.

7.2 Box B: Characteristics at the School District Level

5. Central administrative support and involvement

The main obligation of EDULIS was, as mentioned, to provide advocacy, not financial resources. During the field study I became more and more aware of how important determining continuous support was for the existence and the development of the single school library. The equation of six media-and subject advisors and a working area embracing 1700 schools (and this was still an advantaged situation in comparison with most other provinces) spoke for itself. To offer all schools that needed regular and sufficient support was an impossible task. This was also noted by Alm in the evaluation of LPYL (2002, p.11, 20). Naiker and Mbokazi in their conclusions regarding the support from the Media advisor’s found that “at each of the case study institutions it was evident that support was essential to assisting implementing new systems and processes for sustained, long-term development.” (2002, p.72) Leach also notes the need for provincial support (1999, p.5). Because of geographical reasons, such as long distances, lack of transportation etc., many of the schools in the province did not have the practical possibility to make use of the services offered by EDULIS. Even if they had the opportunity to receive block loans
by post, many of the schools could not afford to pay the costs of returning these, since they had no budget for their school library. This problem had however been addressed by EDULIS and a discussion to change the block loan-system was occurring. A decentralisation process of EDULIS was also initiated in 1998, with the aim of getting the resources closer to the schools. The learning resources were going to be located in education resource centres in the province. The first of these established was situated about 500 km away from Cape Town in Oudshoorn. At the resource centre there were different kinds of school library resources available, copying facilities, access to a computer and materials regarding the new curriculum. The centre was managed by a full-time-librarian.

6. Staff development (in-service) and participation

To make a school library reach sustainability in the long run, it became quite obvious during the field study that it was crucial to anchor the school library among the whole staff and the principal to reach understanding for its educational potential. Dick establishes that the library plans in LPYL were normally worked out by the teacher-librarian together with the Media advisor. (1999, p.12) I believe this might be an issue. If only one person from a school is involved in this process, it might impact on the motivation and willingness among the other staff to adapt to what has been planned. My experience is that schools (just like libraries) are institutions consisting of creative, innovative, sometimes strong headed “experts”, who do not just easily follow unless they understand and share the motives behind and are involved themselves. Hart makes one crucial point, when she comments that LPYL says, “...developing school libraries is all about beliefs and attitudes.” and that “There is a growing recognition in the international research literature that school libraries depend on educators’ subjective perceptions” (To set the ball rolling 2002, see Asselin, 2001). Naiker and Mbokazi frequently points out the commitment of the library committees as crucial to the success of the school libraries (2002, p. 30, 32f, 60f, 64,73f). Training of staff is considered to be one of the most influential factors of whether implementation is a success or not (Banya, 1993, p.100; Hart, 1999:1, p.78-96). A problem noted by Dick, is, that among the Media advisors and the teacher-librarians in LPYL there was no sustained discussion concerning school libraries related to the new curriculum and outcomes-based education. One explanation might be, he says, that there is a lack of real understanding of outcomes-based education. This could easily be referred back to factor 1 and 2 in the model. Another problem was that even if in-service training took place, there were problems with frequent staff layoffs which affected the sustainability.

7.3 Box C: Characteristics at the School Level

7. The principal

The support from the principal during the field study found to be a determining factor. The principals understanding and support, both financially and personally of the school library was crucial to its existence (Banya 1993, p.106; Haycock1998; To set the ball rolling, see Henri, Hay & Oberg, 2002). Also in the evaluations of LPYL this has been evident (Dick, 1999, p. 9; Alm 2002, p.10f, 21) Alm notes that when the principal has been part of the school library committee, the school library has had a greater status. One explanation mentioned earlier, for the lack of school libraries in disadvantaged schools, could be that their principals grew up during Apartheid without any access to
libraries or the possibility to develop a relationship with libraries. (Zinn 1997, chapter 5.3) An interesting observation, with regard to the role of the principals understanding of libraries’ potential and the findings of NEPI concerning the relationship between the existence of school libraries and the existence of stated policy, is to be found in a study by Yusuf Sayed. In his investigation of information literacy abilities among students at five institutions of higher education in the Western Cape, his findings shows that African students are much more frequent users of libraries compared to white students and that they “make extensive use of the library for finding sources of information that are not prescribed.” (Sayed 2000, p. 250, 253).

7.4 Box D: Characteristics External to the Local System

8. Role of government

Since the role of the Media advisors in the past, according to several of themselves, had been more of inspectors representing a departmental service than supportive advisors, it seems reasonable to assume that these relationships would not change entirely over one night. Together with the fact that most of the advisors at EDULIS were coloured, unlike most of the staff and learners in their main working field who were black and thereby also to a great extent belonging to a different social background, it would not be unreasonable to believe that this had an impact on their contacts. Banya however points out one important thing which can be determining, although not normally considered in policy documents and strategies; the personality. He establishes that “Personality plays a key role in the relationship between the centre and the periphery” (Banya 1993, p.111). As I, a white European, together with a coloured advisor visited black schools I was surprised over and over again by how often we were received with openness and warmth. After having travelled with one of the advisors for many weeks, I could not find any other explanation for this than her joyful and relaxed nature which together with a keen ear made people feel comfortable and set a good climate to work in.

9. External assistance

Internal funding: In 1998 at the time for the field study, funds were allocated equally to the schools based on the number of pupils in form of a one-pot-budget. A redress has though, as described earlier, since been made.

External funding: The findings from the field study showed that many school libraries were largely dependant on voluntarily workers and external funding. Many of the observed school libraries would not have been established without the initiative and interest of a single full-time-teacher, together with the support from the EDULIS Media advisors Alm in her evaluation lists promotional mental and material elements. Among material elements she has found to be promotional, she mentions “External funding by means of donations from organisations and individuals.” (Alm 2002, p.23). As already mentioned earlier, I find the reliance of external finding to be complicated and in some cases even counteracting the development of appropriate school libraries. Besides the unreliability, the given funding in form of donations seen in many schools during the field study was seldom not inappropriate. A problem following this was, that even if the books donated they were old, outdated and hardly could be counted as adequate learning support materials, there were an unwillingness to sort out these books, when no better resources
were available. Naiker and Mbokazi in a case study of three of the LPYL-schools notes regarding rich external funding at one of the schools, that “despite such capacity building interventions- or perhaps because of such external support, the school governing body had not begun to budget for any provision library service of its own.” (Naiker & Mbokazi 2002, p.27) At another one they established that “the heavy reliance on volunteerism… was proving to be its Achilles heel.” (ibid, p.47)

In many schools in under resourced areas the existence of the school library was the result of the initiative of a single full-time-teacher, who also to great extent ran this alone. In several of the schools visited, the person in charge received assistance from an unpaid person outside the school. Some of the persons helping out were actually retired librarians or had some kind of library qualification. Many though lacked experience and had to rely on the assistance offered from the Media advisors. Since many of the persons who ran the school libraries had no library-education and often very little time, the work making the books ready for use, like cataloguing, classifying, putting them into an accession register etc. could be a big obstacle.

For schools lacking school libraries of their own, the possibility of receiving assistance from a nearby public library was encouraged by the Media advisors. This had not been without problems though. Learners in large crowds suddenly entering a public library to do research, according to the new outcomes based curriculum, meeting unprepared librarians created not surprisingly some problems. Even though a close co-operation existed between Cape Town City libraries and EDULIS, which consisted of workshops with library staff conducted by one of the advisors with the aim to help the staff deal with the crowds of learners, this had not been enough. After WCED’s attention in spring 1998 had been drawn to the problem of lack of support from teachers,” circular 103” was created. The circular was constructed by the WCED and sent out to all schools in the province, with the purpose to improve the contact between the public libraries and the schools. Another problem preventing learners from using public libraries was in some cases the parents not wanting the responsibility for the library resources borrowed.

7.5 Box E: Contextual Factors

Banya’s strongly emphasises the importance of considering what he choose to name the” contextual factors”, involving social, political, economical and cultural factors in order to achieve a successful implementation. Other researchers have also observed the exclusion of these factors. Cross and Mkwanazi-Twala says for instance, that” Education systems in the Third World and particularly in Africa have ignored the reality of diversity, social, economic, ethnolinguistic and cultural.”(1998, p.27) In the National Policy Framework for School Library Standards, however, as Dick points out, the differences in the South African context are acknowledged (Dick, 1999, p.2).

One impacting issue was the lack of tradition concerning school libraries in many of the disadvantaged schools.

The problem in many under resourced areas with vacant posts and temporary teachers became quite visible during the field study. Dick also recognises the staff layoffs (1999, p.5).
Problems due to infrastructural issues pointed out under factor seven, could also be considered as contextual factors.

During the visits to schools in disadvantaged areas I found that even where school libraries existed, the access to these were rather limited. School libraries being closed and locked during most of the school day, due to security problems was a common problem, especially in the schools located in city areas and in the surrounding townships. The problems of security, affecting the accessibility has also been noted by Alm, Dick and Naiker & Mbokazi (Alm 2002, p.18; Dick 1999, p.9; Naiker & Mbokazi 2002 p.31, 37). In addition, the encouraged co-operation by the Media advisors between schools and nearby public libraries were sometimes prevented by this, as some children refused to go there, claiming they were afraid of the widespread violence in the surroundings. This seemed to be more of a problem in the city townships than in the countryside. Outside the cities the problem was instead the absence of public libraries which affected above all the farm schools.

Another reason for the libraries being closed was that the persons responsible for the libraries, were in most cases full-time class teachers, busy with their own classes.

Alm establishes that the new curriculum is “based on a democratic concept of man with implications on learning: Human beings are independent and not bound by authority, are developing their own understanding and are prepared to stand up for their opinions.” (2002, p.21) It might be worth considering that this democratic, but at the same time rather individualistic approach, is a natural ideal for most people brought up in western cultures. Does it, however, recognise possible cultural diversities in a rather heterogeneous population like South Africa? And, for instance the values of more collective societies?

My experience from the field study was that even if every school at the time received the same amount of money based on the number of pupils, the inherited inequalities would probably for many years to come, prevent the possibilities for the school libraries to receive funding from the one-pot-budget, when competing with getting electricity, toilets etc. The need for redistribution has also been acknowledged by Dick (1999, p.5)
8. Conclusions

Even during the first weeks of the field study I had a feeling that many of the tasks dealt with in South Africa, and especially regarding school library issues in the less privileged schools, were the same as we were- and still are- struggling with, not only in Sweden, but also in several other parts of the world. The impressions from Sweden, shared by many South-African participants of LPYL, often surprised me, as I did not recognise the rather unproblematic picture they were drawing. The lack of explicit emphasis of school libraries in the curriculum, the lack of understanding among principals, teachers having one or perhaps two hours reduction per week to take care of the school library, the problems in the contact between schools and public libraries etc., are common issues- still-, not only in South Africa but also in Sweden. The difference, in comparison to the less privileged schools, is of course the fact that we in Sweden do not have schools lacking electricity, water and other basic needs. The mere existence of a well equipped school library with adequate resources however, is no guarantee for a successful use of the same in accordance with new pedagogical approaches.

The need for in-service training in order to develop an understanding for the school library as a teaching tool has been pointed out as crucial, so also the understanding of the role of the school librarian. My belief, is that only when school libraries are explicitly acknowledged and defined in the curricula, there can be a real change and broad development of school libraries. Genevieve Hart, only one of several in this thesis mentioned is an example of the sharp and clear-sighted minds in the South African school library field and whom, as I met her, deeply impressed me with her clear and rational thinking says, that “Our mistake has been to assume that educators see libraries as we see them. We have acted as if the links between resource-based approaches, tacit within C2005, and libraries were obvious – not realising that the average teacher or policy-maker has very hazy notions of what educational purpose of a library is.”( To set the ball rolling 2002, p.9) I believe this is an important key issue to be regarded in the future.

It has been established that there is among school library professionals no absence of knowledge regarding the educational role of school libraries, but that there is a need for explicit recognition in policy documents and also for concrete strategies if school libraries are going to be implemented and integrated in a sustained way into the new outcomes based education on a broad basis. Hart confirmed my sometimes confused feelings during the field study, as I saw some examples of very advanced school libraries and met people in the library field very conscious and up-to-date regarding international research, when she says that “Within South Africa we have a “North” – a fine tradition of school librarianship. We have libraries in our advantaged sector of schooling on a par with the best in the world”.( To set the ball…, p.4)

And now I will try to answer the initial three questions:

1) Yes, the school library situation differs widely between the various schools. From the past inherited differences are visible not only between the different ethnic groups, but also between cities and rural areas. Even though the state education budget at the time for the field study was being equally shared between all South-African pupils, huge
unfulfilled basic needs inherited from an unequal past, swallowed the finances fast and
prevented disadvantaged schools and their school libraries from reaching the same
standards as the previously more benefited ones. An economical redress has though in
the last years taken place and it would be of great interest to see if this has had any
impact on the school library situation in the earlier disadvantaged schools. Another
factor which can be assumed to contribute to the differences between the schools
attitudes towards school libraries, are the earlier different library traditions and policies
of the different ethnic departments.

2) Regarding factors influencing the process of developing school libraries, it has been
established that some factors can be referred back to the specific conditions of the less
privileged schools, but that many are still of a general character and are to be found also
in more wealthy schools.

A specific factor for the less privileged schools, which could also be referred to as Box
E in Banya’s model was a lack of material resources due to inherited inequalities.
Another problem was also the lack of literature in the indigenous languages, which has
been addressed by some publishers who had given authors specific commissions.
School libraries had to step back when competing with basic needs such as water,
electricity etc. Infrastructural problems, such as long distance prevented the schools
from taking advantage of services offered by EDULIS. Although a decentralisation
process with the aim of bringing the resources closer to the users had at the time for the
field study recently been initiated. Also the problem for schools not taking out block-
loans by post due to inability to pay the costs of return had been attended and taken into
consideration. Another problem impacting on the development of school libraries were
the many vacancies and frequent staff lay-offs. School libraries being locked most of the
day due to security problems were very common. Prevention from co-operation with
public libraries because of violent surroundings was another problem. Lack of
knowledge how to classify and categorize received books, since this was not done
centrally was another obstacle. Another issue was the unwillingness to sort out
inadequate learning resources, sometimes in the form of useless donations, when no
better resources were available. The support from the Media advisors and especially
their innovative and flexible way of working has been noted as crucial in many ways.
The number of advisors in relation to the number of schools though was a difficult
equation. The personality of the advisors was another important factor.

Factors of a more general character were: vagueness, lack of educational arguments and
explicitness regarding school libraries in the curriculum, which impacted on the
understanding and motivation among staff and principals to prioritise the library when
sharing the one-pot-budget. Absence or presence of in-service training regarding OBE
for teachers, voluntary workers and also public librarians was also a factor. The
important role of the personal and material support the principal is prepared to give has
also been recognised in plenty of research literature. Whether the school library and its
role in education is anchored among the staff or not is another crucial factor of general
character for the success of the school library.

3) The possibilities of the development of school libraries in many less advantaged
schools were above all dependant on the external stakeholders. Several active NGOs,
domestic and foreign donations, partnership projects with other schools, mostly
overseas, foreign aid, enthusiastic and motivated teachers working in their free time,
voluntary workers, such as retired librarians, helping out. All these contributors perform important and admirable work. There are however connected issues to be taken into consideration: are the resources received adequate to meet with the requirements of the new curriculum? And is it possible to demand or expect from untrained staff to run a library in accordance with the pedagogical aims of the new curriculum?
9. Summary

This study has been made within the Swedish International Development Agency’s (SIDA’s) Minor Field Study Programme (MFS). The aim of this programme is to provide students at the end of their academic education/beginning of their professional carrier, an opportunity to experience conditions of everyday life, in the studied profession in developing countries.

The aim of this thesis was to evaluate the school library situation, preferably in less advantaged schools, in the Western Cape Province in 1998-2002. An attempt was made, to identify different factors influencing the process of establishing and developing school libraries. The reason for this are the demands of the introduction of a new outcomes based education. The main focus was on under resourced areas and a field study was conducted in 1998 in the Western Cape Province during the first year of implementation. As a frame a Swedish – South African school library project, Library Practice for Young Learners. Developing school library resources to primary and secondary schools in disadvantaged areas in South Africa (LPYL) was used. The project was carried out in two phases and lasted between 1997-2002. Four later published evaluations of the LPYL-project were incorporated into the analysis and discussion with the aim to enhance, but also to question the findings from the field study. The aim was not to evaluate the project itself. The initial specific questions were:

1. Is the situation of various school libraries different and what is the basis for these differences?
2. What factors influence the development of school libraries, both practically and in relation to the implementation of new educational approaches?
3. What are the possibilities of development of school libraries in the Western Cape Province?

To analyse the results a model drawn from education by M. Fullan, revised by K. Banya was used. The model consists of different factors impacting on the process of implementation of educational change in underdeveloped countries. Banya’s contribution to the model consists of adding the, as he suggests, necessary cultural, economical and social factors. He claims, with support from several other researchers, that the process of implementation is an overlooked issue and that the factors added to the model can play a key role in the implementation process.

In the conclusions reached some factors were found to be specific for many of the under resourced schools/areas, such as shortage of adequate learning resources, especially in the indigenous languages, dependence on external support in form of voluntary workers and donations, infrastructural problems, absence of possible co-operating public libraries, locked libraries due to security problems, frequent staff layoffs etc. The large dependence on external stakeholders was found to sometimes make the existence of the school library vulnerable and also counteract sustainability. Many of the factors could be referred back to inherited inequalities.

Several of the factors found to influence the process of developing school libraries were however not specific for under resourced schools/areas, but could also be found in the research regarding developed countries. These were for example problems due to lack
of explicit emphasis of school libraries in the curriculum, teachers focusing on textbooks, lack of understanding of the educational role of the school library in outcomes based education, lack of support among principals, teachers having one or perhaps two hours reduction per week to take care of the school library, the problems in the contact between schools and public libraries etc.

I believe that the factors found in this thesis should be taken into consideration when planning and organising an efficient school library organisation. This has to be done in order to utilise the limited resources as much as possible as well as offer the students a secured quality in their education.
10. List of References

Unpublished material

In the possession of the author:

Oral information received by below listed informants during the field study, preserved in own working record:

- The Media/ Subject advisors, the Head and other staff at EDULIS.
- Principals, teachers/ teacher-librarians/ external assistance in charge of the school libraries at the visited schools.
- Librarians at public libraries, co-operating with schools.

Own written records from the observation phase.

The EDULIS’ working record of the WCED schools and their school libraries.

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