Preserving Our Heritage
An Independent Advantage

Patricia Liebetrau

Abstract
Significant national funding is not made available for cultural and heritage digitisation and preservation purposes in South Africa. Furthermore a lack of Government support for digitisation initiatives has resulted in stifled development and a dearth of skills in this area. The situation has worsened in the current economic climate. There is a dire lack of IT skills for libraries and archives with few training courses and other opportunities for continuing professional development. Minimal digital project management expertise currently exists in the country. These and other challenges have contributed to stagnation and project failures. This paper looks at the valuable role played by independent professionals in assisting organisations to move ahead with projects and to overcome or manage these challenges. Very little has been written on this topic, especially in Southern Africa, so this paper draws largely on personal experiences in collaboration with other independents, from a practical perspective.

Author
Patricia Liebetrau is an independent information professional providing consulting services and training for media development in South Africa and beyond into Africa. Prior to this she worked with Digital Innovation South Africa (DISA) (http://www.disa.ukzn.ac.za) over a period of 10 years. This innovative project developed an extensive online digital repository of open access resources around South African heritage that assisted new curriculum development and contributed to e-learning and e-research initiatives. Her skills and interests lie in research and implementation of digital technologies in creating information and knowledge resources for libraries, archives and memory organisations. Her area of specialisation is metadata and she was the first metadata librarian in South Africa. Her current focus is on change management and leadership development for the library and archive profession to support academic scholarly endeavours.

1. Introduction
Cultural heritage organisations and archives, including community archives, are increasingly utilising and exploring ways of using evolving digital technologies to enable their collections to be discovered, accessed and utilised in a Web environment. Many of these organisations have extensive, important and interesting physical collections and resources. Digital technologies are enabling these organisations to reach an online audience.
These same technologies provide countries in continents such as Africa with an overdue opportunity to claim their presence in a global environment. Rich but endangered national cultural heritage resources from national archives, Universities, community archives and other organisations can be digitised and made available for research purposes and preserved for long-term access. The process of digitisation itself is a preservation step by minimising handling of precious original resources and artefacts. However once digitised the challenge becomes one of managing preserving data for the long-term.

However several challenges are slowing the rate of digitisation efforts in South Africa and in Africa as a whole. Additionally, the fragility of digitised resources can pose a real and underestimated danger. Digital chaos, resulting from a lack of skills, knowledge and understanding, can only too easily undermine a digitisation project. Unsuitable hardware and software purchases, inadequate infrastructure, use of proprietary software with expensive licensing requirements, inconsistent or inappropriate use of international industry standards and other factors impede successful large scale digitisation.

Many libraries and archives in Africa have been fortunate in the past in securing funding from philanthropic organisations, private funders and other sources of funding for specific projects. However with the current economic climate, many sources of funding are simply no longer available to assist organisations undertake digitisation projects on a large scale. Even more concerning is that sufficient funding is often not available after the end of the project to provide for preservation and ongoing Web access costs. Without strong national support, funding and infrastructure, responsibility falls to individual organisations to provide digitisation budgets and cover the associated infrastructure and data preservation costs. In the absence of committed funding or exit strategies, projects may ultimately have to be parked or abandoned. Ultimately the vision is to move from externally funded projects to institutionally committed programmes.

2. South Africa

South Africa, situated at the southern tip of Africa, currently has a population of just less than 60 million people. The country itself is geographically divided into 9 provinces. It is a diverse and multicultural country with 11 official languages although English is widely spoken and considered to be the de facto language.

The Internet World Stats website reports that as of 31 December 2012, South Africa had 6.8 million internet users, just less than 5% of Africa’s total internet users. At 140 million estimated internet users in Africa, South Africa is the 5th largest user on the African continent. Low internet usage across the Continent impacts on the ability of Africans to leverage this media to enhance the visibility of African (digital) heritage and academic scholarly output.

3. South African Initiatives

South Africa does not currently enjoy widespread national funding and extensive governmental support for digitisation initiatives such as that provided by JISC in the United Kingdom. Universities are largely funding their own individual digitisation projects, often supplemented by foreign funding, to support e-
research and provide global access to their own scholarly resources by building Institutional Repositories (IRs). The National Research Foundation (NRF) has created a National Electronic Theses and Dissertations (NETD) portal ⁴ for searching, browsing and accessing South African theses and dissertations from South African Universities that have their repositories open for harvesting. The long-term responsibility of preservation of the data resides within the Universities. A grant from the Carnegie Corporation of New York has enabled the NRF to assist previously disadvantaged Universities with training and hosting of their ETDs on a server housed at the NRF.

Under the auspices of the same project, a collaborative publication “Managing Digital Collections: a collaborative initiative on the South African Framework” ⁵ was published by the NRF in 2010 as an introductory guide intended to supplement a series of regional training workshops aimed at assisting Universities and heritage organisations gain valuable skills. The regional workshops have, sadly, never taken place.

Several Universities are considering, or are already digitising their own unique resources such as those housed in University Archives and Special Collections. Many of these collections are unique and provide a rich insight into our heritage. The University of Cape Town, for example, has digitised several interesting collections housed in their Manuscripts and Archives Department.⁶ One such project is the digitisation of photographs of the San (Bushmen) peoples between 1910 and the late 1920’s. The photographs were taken on numerous expeditions made by Dr Wilhelm Bleek, his sister-in-law Lucy Lloyd and his daughter, Dorothea, to the northern Cape Region of South Africa where the San people lived. This collection, possibly the most unique of UCT Special collections, is listed on UNESCO’s Memory of the World register as being heritage of international importance. The full collection of notebooks, oral histories, drawings and photographs are held across three institutions - South African National Library, the National Gallery and University of Cape Town.

The Campbell Collections of the University of KwaZulu-Natal⁷ is a centre of research excellence with an archive, a museum and a library of rich holdings reflecting the social and cultural heritage of KwaZulu-Natal, South Africa. Several thousand early 20th Century historic photographs from this collection have been digitised and made available online to researchers around the world. The fragile originals are now less frequently handled adding to their longevity. This project was made possible with funding from the Andrew Mellon Foundation.

These and similar projects, although often limited in scope, provide online access to important South African heritage, which would otherwise be little known outside the country. Many of these projects have relied on foreign funding to cover costs of digitisation but long-term preservation costs need to be covered by the University itself.

Collaborative digitisation efforts between Universities in South Africa are generally not the norm but two important collaborative initiatives do need mentioning. These are the Digital Innovation in South Africa (DISA)⁸ digital archive of South African socio-political resources and the University of Witwatersrand Rock Art Digital Archive.⁹

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⁵ Managing Digital Collections: A Collaborative Initiative on the South African Framework
3.1 DISA

DISA started as a project, funded by the Andrew Mellon Foundation in 1999. The vision was to digitise and create a freely accessible online scholarly resource focusing on the socio-political history of South Africa, particularly the struggle for freedom during the period from 1950 to 1994. It was a national collaborative project, the first of its kind in the country, partnered by the several South African Universities, The National Archives and The National Library. Selected periodicals were sourced from around the country and missing issues sourced from the USA and the UK. Complete runs of “hard-to-find” anti-apartheid journals were for the first time made available “virtually”, in full text, for a global audience.

The second phase was more ambitious. Archival resources identified by scholars as being important documents in the struggle for freedom were identified from a number of institution’s archival records. These primary source documents came with copyright and privacy issues, which were navigated with much paperwork and many hours of correspondence and evoked criticism from some quarters that the resources were “cherry-picked” and were therefore taken out of context. Being funded by an American funder also evoked cries of imperialism.

The funding came to an end in 2009 and without a financial commitment from the partners, a clear exit strategy and on-going funding for preservation of the content, the website and resources have been parked pending negotiations with the National Library of South Africa to maintain the national resource. They will, however, require training and funding in order to undertake the task. The host University declined to maintain the resource for the long-term. The website and content is maintained by volunteers.

Despite criticisms, the project was successful in making available a large number of multimedia resources that have been and are still being extensively used around the world by researchers. What is important in the context of this paper is the significant technological skills development and transfer that took place as a result of the project. This included digital conversion skills, metadata, IT for digital resources and IP for digital libraries and could realistically have created a national platform to provide momentum for digitisation efforts. It didn’t. Organisations were “waiting” for “national” policies and strategies and support. The training in partner institutions did however provide the impetus for development of several important heritage projects such as the San photograph digitisation project at UCT, mentioned earlier.

3.2 The African Rock Art Digital Archive

The African Rock Art Digital Archive (SARADA) project, the largest of its kind in the world and based at Wits University in Johannesburg, is a “milestone in the digital preservation of Africa and the world’s cultural heritage”\(^{10}\) and a good example of a national collaborative project. It is funded by The Ringing Rocks Foundation and the Andrew Mellon Foundation and brings together scattered collections into one “virtual” space. Images have been scanned from Museums, Universities and private collections around the country. A significant contribution to the sum of African heritage is being made available online through this project.

It is precisely these kinds of projects that are able to drive cutting edge technological developments and define digital information management boundaries but widespread skills deployment is urgently required to push digitisation initiatives forward in South Africa. Valuable skills remain within the project,

\(^{10}\) [http://www.sarada.co.za](http://www.sarada.co.za) Accessed 27 August 2012
often invested in short term contract staff and student assistants until project insecurity drives them further afield, taking their skills with them, often outside the country!

4. National Register of Digital Initiatives

Browsing through the NRF register of digitisation initiatives in South Africa\(^{11}\) (another project funded by the Carnegie Corporation of New York) indicates that the majority of the initiatives listed on the database are still in the planning stage with just a very few projects in progress or completed. What is holding back the realisation of these initiatives?

5. Public Sector

Examining some of the reasons for the slow uptake of digitisation in the Public Sector it is clear that the lack of national leadership, a national policy and a national strategy providing support for a standardised approach to developing digital resources has resulted in organisations “waiting” for national guidance before proceeding. A draft of the long awaited National Policy on the Digitisation of Heritage Resources\(^{12}\) was made public in 2010 for comment but remains to be published.

Added to this is the lack of national funding to undertake digitisation projects and limited training options available for continuing skills development. This has resulted in a dearth of suitable skills and a paralysis in the industry.

6. Private Sector

The situation in the Private Sector is different. The positive effect of a Web presence on scholarly communications is one that University Research Offices are increasingly keen to capitalise to their own advantage. Librarians, with the mandatory skills for managing information, are being tasked with developing online resources and making academic staff and student output available on repositories. The challenge facing libraries and special collections in South African (and African) Universities is the reskilling of existing professional staff to undertake the new responsibilities that come revised job descriptions. University Librarians are hard pressed to find solutions.

Training is required at all levels, from management level to assistant level and covers a vast spectrum such as digital project management, metadata expertise for content and data management, digital media conversion, digital industry standards, best practices and guidelines. Many companies in South Africa do provide digital conversion services but not metadata creation services.

Training opportunities from commercial companies are few and far between, expensive, and often require extensive travel with long periods away from home. This is one of the roles that independent professionals can and are currently fulfilling.

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7. Independent Professionals

According to the website of The Association of Independent Information Professionals\textsuperscript{13} in the USA, “independent information professionals use high-level skills in finding, managing, applying, and communicating information, and they pursue their calling with an entrepreneurial spirit” …and they …“use the skills of librarians, private investigators, database searchers, market researchers, competitive intelligence researchers, writers, indexers, and other professions in their work”. This correlates with the observations of Wamundila et al\textsuperscript{14} who view knowledge and content management specialists as a special breed of information professionals. Furthermore these “super” information professionals manage knowledge that helps in reducing organisational operational costs, improves income flow and operational performance.

In the context of this paper the term Independent Professionals is used to include independent information and information technology professionals.

In South Africa, independent professionals are providing much needed skills and services in professional training and the application of innovative technology to support cultural heritage, library and archival digital resource requirements. They are plugging a gaping hole by providing an important body of knowledge and expertise, coupled with local understanding. They provide a level of service provision that is not otherwise available in the country, especially in the rapidly evolving technology environment where innovative solutions are required to suit an African context.

Independents are well placed to provide training that is at the cutting edge, but relevant, customised and suited to the level and understanding of trainees. Training for ongoing professional development is currently the most pressing segment required to hasten the rate of digital initiative development. This encompasses all aspects of the new roles = new job descriptions = new skills scenario accompanied by change management and leadership development requirements to support a solid foundation for this transformation. The Centre for African Library Leadership (CALL)\textsuperscript{15} at the University of Pretoria was developed to address the need for library leadership training and skills development of library managers in a formal programme approach. However, it is not only managers that benefit from leadership development.

Two case studies are discussed here as illustrative examples of the roles played by information professionals.

7.1 Mentoring Programme

A Mentor Programme has been designed and implemented to assist libraries expand their services and tackle new challenges in building digital resources. After adopting many training approaches it became evident that short courses tended to be unsatisfactory for many trainees, as they didn’t have the understanding of all the “parts” fitting together. Frequently librarians would complain that they weren’t able to deal with the IT requirements or IT technicians would complain that they couldn’t understand librarian’s needs. Librarians and IT professionals have not traditionally in the past worked together but now need to work closely with each other now and it seems that it is not a good marriage. Thus the “whole (integrated) picture” was required to be experienced and understood, over a period of time, in a

\textsuperscript{13} http://www.aiip.org/ Accessed 27 August 2012
\textsuperscript{14} Wamundila et al. Meeting the training needs for knowledge and content management specialists: case study of Southern African Universities: 5
\textsuperscript{15} http://www.library.up.ac.za/carnegie/centre.htm Accessed 27 August 2012
supportive, non-threatening environment. The mentor programme was developed to satisfy this need. A unique aspect of the programme is the specialised and individual approach tailored to each Mentee while satisfying the requirements of their own institution. This approach is recommended in findings in an investigation to establish the (then) current state of University libraries in Africa.\footnote{Rosenberg. Towards the digital library: findings of an investigation to establish the current status of university libraries in Africa. 17} Extensive hands-on training is accompanied by development of guidelines, best practices and quality assurance processes. Assisting organisations in documenting policies, guidelines and best practices are essential in saving time and money due to changes in management and staff turnover. No point in re-inventing the wheel. Documentation can be versioned as changes are introduced and adapted for various projects. They can be made available on an organisational library website and used as a template by others to make the process easier and more efficient.

The mentoring programme is particularly useful for the more geographically remote Universities in African countries where little or no specialised training facilities are available locally. This approach equips Mentees with complete confidence in dealing with project management, scoping, assessing equipment requirements, metadata creation, long-term preservation, and ensuring high quality deliverables at the end of the project. A train-the-trainer approach, where the trainee is tasked with training colleagues and staff back home after completing the Mentor programme, has proved economically viable for many small libraries.

\section{7.2 The Ulwazi Community Memory Programme (http://www.ulwazi.org/)}

Another innovative way that independent professionals are making a difference is in the use of mobile technologies to assist communities build indigenous knowledge resources.

Durban is a busy port city on the east coast of South Africa. In the early part of the twentieth century Durban’s development as a colonial city, was clearly reflected in styles of architecture, in dress codes, in modes of transport and others. A hundred years later, and the city has developed into a thriving multicultural commercial and industrial African city, with a population of around 3 million inhabitants. The local museums and archives in Durban hold rich resources about the local history but it is the Zulu heritage which is the least documented and urban migration threatens the loss of oral histories traditionally passed down through families. The eThekwini Municipality of Durban has an infrastructure of around 89 public libraries. The Ulwazi Project was developed, with funding assistance from the Goethe Institute, as part of the Public Library’s mandate to establish online indigenous resources as an integral part of services to the communities they serve. It comprises a portal, wiki and blog where indigenous knowledge from the local Durban communities can be submitted, uploaded and preserved using Web 2.0 technologies. “The utilisation of the combination of open-source and social media applications for archival and heritage purposes makes this project unique in South Africa”\footnote{Greyling, Elizabeth and Niall McNulty. How to build an Indigenous Digital Library through Community Participation: the case of the Ulwazi Programme. 9}

Following on the success of the original Project, the Ulwazi Programme sought ways to develop an innovative model to capitalise on the phenomenal growth of mobile technology, specifically those with browser technologies. It is estimated that cell phone usage in Africa is now close to 70%.\footnote{Ibid. 9} To make the project more relevant to the local community, the content on the website was made accessible to users through their cell phones. Then the concept was extended to enable the collection of indigenous

\begin{itemize}
\item [16] Rosenberg. Towards the digital library: findings of an investigation to establish the current status of university libraries in Africa. 17
\item [17] Greyling, Elizabeth and Niall McNulty. How to build an Indigenous Digital Library through Community Participation: the case of the Ulwazi Programme. 9
\item [18] Ibid. 9
\end{itemize}
knowledge material using mobile phones. “The initiative showed that cell phones could be used productively as a tool in the exchange of indigenous knowledge...”. This enhances the archival knowledge experience for members of local communities. The eThekwini Municipal Library has assumed responsibility for the long-term curation of the data.

8. Preservation of Digitised Resources

“In sub-Saharan Africa, the volume of digital information media produced is comparatively small, but preservation challenges are particularly acute. If digital media cannot be preserved, part of the Africa’s heritage is being lost.”

Despite setbacks and challenges, there are important projects digitising heritage resources and providing access. Some of these projects have stalled or been parked for lack of funds to support long-term preservation. Very few are actively focused on preservation issues in a sustainable way. One could argue that digitisation in itself is a form of preservation - by making a digitised surrogate, the original physical form is less handled and better preserved. Also by making resources available you are (in a way) preserving heritage by keeping it alive. But the data also needs to be kept alive...! Cohesive efforts will need to be implemented as more resources are digitised. The lesson learned from DISA is that long-term curation and preservation is not an add-on luxury but requires attention from the beginning of the project.

9. Conclusion

A measure of the contribution that independent professionals are making is difficult to assess. In the short term, tangible success could be measured by increased digitized content, websites, available guidelines and policy documents. Referrals and requests from satisfied clients are always a good measure.

Currently, independent professionals work largely in a loose networked environment, respecting each other’s skills and professional ethics. Three of the final recommendations from the INASP investigation into digital library needs in Africa were:

- Best practice in user education for the digital environment should be summarised and disseminated to ensure efficient use of digital library services.
- Working with partners, develop and support continuing education and training programmes for librarians using a variety of approaches and methodologies.
- Support consortia to build strong networks and expertise within their countries/regions, so enabling them to take on wider coordination and advisory roles and to foster collaboration among libraries involved.

It is possible that a more formal Association could benefit the heritage sector by playing a more proactive role in developing tools, promoting advocacy and fostering new partnerships, cross-institutional

19 Ibid. 11
20 Lor, Peter Johan. Preserving Digital African Resources: is there a role for repository libraries? 63
21 Rosenberg. Towards the digital library: findings of an investigation to establish the current status of university libraries in Africa. 28
collaborations and mentoring initiatives. This would require a subscription model to sustain and provide for staff and operational costs. In the interim it can be said that independent professionals can, and are, making a positive, if modest, contribution to the state of the art of preserving our culture.

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