

**BUDGETING CONSTRAINTS FOR SCHOOL LIBRARIES: A STUDY OF  
SELECTED SCHOOLS IN THE NKANGALA REGION, MPUMALANGA.**

By

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DISSERTATION

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## DECLARATION

I **Greatness Thulisile Nsingwane** declare that the thesis hereby submitted to the University of Limpopo for the degree of **Masters** in the **Programme of Information Studies** of the **School of Languages and Communication Studies, Faculty of Humanities**, has not previously been submitted by me for a degree at this or any other university; this is my original work and all other information sources are acknowledged.

Nsingwane

Ms G.T. Nsingwane

12 Dec 2012

Date



## DEDICATION

All the efforts of this study is dedicated to the love, care, guidance and protection of the **Almighty**, all **His angels/ancestors** including my late parents **Sandlasakhe Saphira (nee Pevez-Ngomane)** and **Sishweshwe Amos Nsingwane kaSithole**, my family who supported me throughout.

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## **KEYWORDS**

Budgets in school libraries; budget constraints- school libraries; school budgets; school library – budget; fundraising-school libraries; School and public library cooperation.

## **ABSTRACT**

The key aim of the study was to investigate whether school libraries in the rural schools of Nkangala region, Mpumalanga do implement budgeting policies due to funding constraints and poor service delivery. The library-computer centre can enhance teaching and learning.

Some 188 school libraries were selected to explore their budgeting procedures and only 81 responded. The survey data collection method was used through a self-administered questionnaire which was distributed to teacher-librarians. The results of the study were analyzed according to frequencies and graphically displayed in table form.

The results of the study show that almost all rural school libraries in the area have neither budgeting policies nor adequate budget to spend for effective service delivery. This shows that not only do school libraries experience budgetary constraints, but there might be other factors contributing to their poor library service delivery. It is important to empower school principals, SGBs and top managers in library budgeting procedures and for all to work cooperatively to achieve the expected educational goals.

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## **CHAPTER ONE**

### **INTRODUCTION**

#### **1.1 INTRODUCTION**

Since 1994 there have been significant changes aimed at addressing historical imbalances in the South African education system. The government has made great efforts and allocates relatively big amounts of financial resources to education (Hell, 2005: 5). According to Bloch (n.d) the educational budget has increased from R69 billion in 2005 to R105 billion in 2007/2008, and 2008/2009 R139 billion. However, while gains have been made in increasing the budget, this has not been accompanied by an equal distribution of funds. Most rural and township school libraries still have poor collections, sometimes consisting of textbooks provided by the Department of Education (DoE). Some schools rely on classroom boxes, mobile trolleys or classrooms are used as libraries with full time teacher - librarians working on a part-time basis. There are schools with no libraries as all. Wessels (2010:138) cites SAPA (2009:5) that the Department of Education rather put some of this money into something concrete like school libraries.

In 1998 the South African government introduced Curriculum 2005, which was viewed as a planned framework (process) of curriculum innovation underpinned by factors such as redress, access, equity and development. It was based on the concept of Outcomes-Based Education (OBE). OBE in turn was the approach focussing on what is learned and how learning takes place. Those of us in the school library world hoped and expected that this was the opportunity to ensure that learners would get access to library services, but unfortunately the opposite happened (Dlamini and Brown, 2010:1). Education officials at the highest levels did not support the development of school libraries or even actively exposed them (2010:1).

With challenges experienced with Curriculum 2005 the government introduced and followed by Revised National Curriculum Statement (RNCS)<sup>1</sup>. The Revised National Curriculum Statement is thus not a new curriculum, but a streamlining and strengthening of Curriculum 2005. It keeps intact the principles, purposes and thrust of Curriculum 2005 and affirms the commitment to outcomes-based education (De Waal, 2004: iv). The new and revised curriculum meant that the South African Department of Education had to ensure that all schools have functional school libraries in support of the curriculum.

According to the National Guidelines for School Library and Information Services in the Department of Basic Education, "School library and information services should provide access for learners and teachers to a wide variety of curriculum support services, exposing learners to diverse ideas, experiences and opinions to instill the culture of reading and writing." Outcomes-Based Education curriculum and its successor, the Revised National Curriculum Statement (RNCS) require both learners and teachers to make constant reference to various library sources (Hart, 2006). However, RNCS holds the same contradiction as Curriculum 2005 in that it demands information literacy outcomes without providing for school libraries and information literacy education (Hart, 2007: 10).

De Groot and Branch (2009:59) concur that the new curriculum requires students and teachers to have access to a wide range of print and electronic resources. Mardis, (2009) cited in Ahmad (2011) contends that teachers have very specific information needs relating to mastering of the curriculum content and the behavioural structure of their classroom for a diverse range of learners. In addition, learners need information literacy skills to effectively identify their information needs, locate the required information and evaluate its appropriateness. However, Dubazana and Karlsson (2006:1) agree that much has been written in scholarly literature and policy texts about the importance of

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<sup>1</sup> Curriculum and Assessment Policy Statement (CAPS) has replaced RNCS effectively from January 2012.

the school library for accessing curriculum but its realisation is still not apparent. According to De Jager, Nassimbeni and Underwood (2007: 143) this has not been accompanied by any expansion of school libraries or explicit recognition by policy makers and opinion leaders of the centrality of the library in the educational enterprise.

International research has demonstrated that when a well-functioning, well stocked, well-staffed library is added to a school, the performance of learners goes up by 10% - 25% (Lance, Hamilton-Pennell and Rodney, 2000 cited in EE, 2010). Local research shows that schools in South Africa that do have a library have pass rates of 19% higher than those without (EE, 2010 cites Borat and Oosthuizen, 2008).

Scholars such as Reed (2002:1) and Lance (1994) agree that good education system requires a good library. Without any doubt, school libraries are a source of support for daily critical thinking and responsible decision-making and in general living (Baines, 2000: 200). Hell's (2005: 4) study shows that school libraries have a chance to improve the new teaching and learning approach in schools, and the interviews showed that teachers and learners would like to use school libraries more and that they got valuable help from them.

Aitchison (2006: 96) point out that schools in rural areas are still under-resourced compared to those in urban areas and many still are. She adds that historically the funding of schools was organized in such a way to keep black schools under-resourced. Wessels (2010:1) made a comment that "In my experience many of the so-called school libraries in existence are dysfunctional, often locked, and used as storerooms for old and irrelevant stock. Classroom libraries or reading corners consist of tattered and torn magazines and text books. The situation is worse in former African schools (schools for the mostly black community in townships and rural areas), but even former Model C schools (Government schools in former white areas) have had to close their libraries due to lack of funding and no posts for teacher-librarians".

To address the shortage of school libraries and curricular and information needs of South Africa, collaboration was mooted since the late 1990s when UNESCO hosted consultative workshop and established a committee to investigate library cooperation. With this model, in areas where there are no school libraries or where resources are poor, the school libraries work together with the local public libraries to support children and young adults in gaining the necessary skills as the public library is often a place where children first experience the wonder of libraries and reading (De Groot & Branch, 2009: 51).

More than 50% of the schools in rural areas of South Africa still do not have a library and over half of the schools are 60 kilometers away from a library. The solution is for disadvantaged schools to cooperate with public or community libraries. Le Roux & Hendrikz (2006: 621) explains a community school library as an integrated public and school library service, operating from a single building according to an agreement between the school and another tax supported agency or agencies, for example, the provincial or local government authority.

The location of the combined facility has to be within a 750-meter radius of participating schools, that is, the schools have to be within ten minutes' walking distance from the library. The facility can be either be a new purpose-built library or an existing structure found to be suitable by the provincial LIS for housing a combined library facility (Hendrikz, 2002:8; Le Roux & Hendrikz, 2006:621). The nature of the accommodation and of the facilities will be determined by the aims, goals, and objectives of the information service. It is imperative for the facility to have one or two separate activity rooms with external doors for teaching information literacy to the learners of the participating schools during the day, and for adult community activities during the evenings.



According to Smit & Hennessy (1995:2) the combined facility should be located within a minimum walking distance of the school: about one kilometre from primary schools and two kilometres from secondary schools. A cluster can consist of five to twelve schools and the size of the facility may vary significantly from community to community, according to different community dynamics and circumstances (1995:2). The Media in Trust (2005:8) cited by Nzimande & Stillwell (2008:234) sees clustering as “the story of ubuntu” as each school “recognises that it has much to gain from other schools in the community, each has a stronger sense of what it has to give in return”.

One of the pivotal services offered by the combined library should take the form of block loans, circulated regularly to the classrooms of the participating schools, as a resource for both educators and learners. The presence of books in the classroom would ensure that books and book-related learning are integrated into the learners' classroom experience from an early age, promoting an awareness and appreciation of the importance of books and libraries.

The combined library should form part of the existing provincial LIS with all its advantages (Le Roux, 2001: 260). The combined library would also forge links with other community-based and non-governmental organizations to enhance its services to its users. These would include literacy organizations, educational organizations, and initiatives such as telecenters and multipurpose community centres (MPCCs) (2001: 263).

School libraries ([www.thutong.doe.gov.za](http://www.thutong.doe.gov.za)) points out that the South African government plans to implement a policy to provide all schools in South Africa with access to library materials. The aim is to supply all schools with a central school library as well as teaching resources (printed and digital). The planned allocation is a start up of R300, 000 and subsequent funding of R50, 000 for supplementary materials.

Although there are differing views on how much should be spent on a learner for library sources, the gist of the matter is that school libraries are essential for the education of the learners.

### **1.1.1 Budget allocations for school libraries in South Africa**

The provision of school libraries to rural schools is one of the challenges that the South African government is trying to address and the responsibility for funding schools in South Africa, remain with the Department of Education (DoE).

The funding of the school programmes in South Africa is carried out at four levels: national, provincial, regional and school levels.

#### **a) National level**

The National Department of Education regards the school library as the centre of teaching and learning. According to the South African Schools Act of 1996 (Act 84 of 1996), the national government is responsible for the funding of schools. This responsibility was given to the education departments in the provinces by the National Department to ensure that provinces design relevant services for their needs. The National Treasury allocates budget to all the nine provinces. There are policies and guidelines for provinces on how to utilise the allocated funds.

#### **b) Provincial level**

The provincial office has the responsibility of allocating a share of 10% of the prescribed Learning and teaching support material (LTSM) to the school library section, which increases with inflation every year (Mpumalanga Provincial Government, 2006; Schmidt & Rieck, 2000: 236). Mojapelo (2008:52) notes that a larger portion of provincial budget is spent on LTSM in the form of stationery and textbooks, leaving the school library section with only 10% allowance which is too little for libraries to function effectively.

According to Thwala (2010: 26), Mpumalanga is the only province that has declared all public schools Section 21 institutions and it is reported that this particular province allocates the highest amount per learner at its “no fee” schools. Unfortunately, the fact that “no fee” Section 21 schools were granted additional functions in Mpumalanga did not necessarily translate into the transfer of lump sums into their bank accounts or to greater financial management authority as well as decision making powers (Thwala, 2010: 97). Unfortunately, Johansson (2007:1) points out that provincial education department do not have economic possibility to immediately provide every school with a traditional school library in order to redress the inherited disparities and equity between schools.

### **c) Regional level**

The provincial department sends the ‘*paper-budget*’ (APPENDIX C) to schools (already with listed items and amounts). In turn the schools claim their budgets from the regional office. The paper-budget is the key indicator of how much should be spent on which line items depending on how much funds are allocated to the school.

### **d) School level**

As a result of South African School Act (Act No. 84 of 1996) considerably more authority and responsibility for decision making has been devolved to the school level than was previously the case (Mestry, 2006: 27). In case schools intend buying library resources, they add a library as another item for inclusion on the prescribed paper-budget. The School Governing Body (SGB) together with the principal and/or School Management Team (STM) would then oversee the allocation of the budgets.

Thwala’s (2010:97) findings indicate that implementing problems that are cited in his study are varied, but many are hinged on the apparent conflict between the financial roles and responsibilities of school-based management structures and those of the education department. The fixed amounts for specified items in the

paper budgets and the process of shifting funds from the items (i.e., verimentation) were cited as examples of the schools' lack of greater financial autonomy and decision making powers. The schools describes the process of verimenting funds from the paper- budgets as cumbersome because the SGB and principals are required to obtain permission to shift funds and wait in anticipation for responses that, in most cases, were not forthcoming. In terms of the South African Schools Act (Act No. 84 of 1996) Section 21 schools should be allocated lump sums to manage on their own and to deal with suppliers directly (2010:97).

Due to budget constraints for school libraries, some schools end up fundraising in order to maintain their services. According to Kabamba (1999:3), fundraising is an important component of library/school library advocacy. Mojapelo (2008:51) also mentions that the SASA No.84 of 1996 empowers parents to supplement the school income through voluntary contributions.

Another method to augment funds for school libraries is through soliciting of donations (money, books or personal computers) from stakeholders such as Non-Governmental Organizations (NGOs), the private sector and individuals, to mention a few. The private sector internationally and nationally has shown much interest in education and has provided computers to some schools in urban and rural areas. The challenge is whether schools or school libraries have the capacity to fundraise and if they have policies to guide them on augmenting the budget obtained from whatever source (Fourie 2002:107 cited by Mojapelo 2008:53).

## **1.2 BACKGROUND INFORMATION TO THE STUDY**

South Africa has nine provinces and in terms of school facilities they all differ. Mpumalanga is one province which has, for a long time, been regarded as having poor infrastructure (this includes school libraries) and this meant that schools are not able to support the curriculum. Prior to the first democratic elections in 1994, South Africa consisted of four provinces. Following the

election, five new provinces were established, of which Mpumalanga was one. It is mainly a rural province and in terms of administration it covers sections which in the previous regime fell under the homelands of Kangwane, Lebowa and Kwandebele (South African Institute for Distance Education (SAIDE) (n.d).

Mpumalanga Provincial Library Services offers public library services in a province that is largely rural and also “new” in the sense that it was created in 1996 after the elections of 1994 (De Jager and Nassimbeni, 2007:1). In addition, they agreed that many of the libraries are in isolated areas and have to meet the very diverse needs of the communities (2007:1).

In terms of schools, Dlamini (2004: 53) points out that Mpumalanga is one of the nine provinces in South Africa which does not have the facilities that the other provinces have.

**Table 1: Indicators for facilities in Mpumalanga**

School facilities	Percentage
• Libraries	22,8%
• Sports fields	39,1%
• Availability of playgrounds	48,5%
• The availability of staff rooms	49,5%
• General condition of schools	56,8%
• Offices of the principal	57,4%

Dlamini (2004: 53) cites Hartley (1998:10) who points out that many schools are unsuitable for learning. Hart (2006: 48) indicates that in terms of school library and public library provision, Mpumalanga typifies South Africa’s “rural” provinces with, for example, only 18 percent of its schools having libraries. The distribution

of the libraries in the Province is, as elsewhere in South Africa, uneven, with its towns fairly well provided for but with few libraries in its two sprawling apartheid-era “homelands” (2006: 48).

The change of the curriculum and poor results meant that the province had to address poor school libraries or non-existent libraries in some schools. However, lack of appropriate funding remains the single most important factor influencing library facilities. As Okiy (2005: 71) puts it, “The importance of funding in providing library service cannot be over emphasised. It is the glue that holds the building, collection and staff together and allows the library to attain goals.” Anafulu (1997) cited by Okiy (2005: 71) concludes that “money can be considered the soul of any library”. Key findings by Williams and Wavell (2002:6) show that schools with better funded libraries tend to have students gaining higher average reading test scores after socio-economic conditions have been taken into account.

The stance Mpumalanga took was to support the decision taken by the national government to improve rural school libraries in the province. The Mpumalanga DoE channeled millions towards the provision of school libraries as it acknowledges the importance of libraries in teaching and learning. This is demonstrated by the commitment made by the then MEC for Mpumalanga Department of Education, that:

In the 2005/06 financial year, the Department has taken a step to convert libraries into centres of information and to promote and improve literacy skills. He said further that school libraries have been resourced with progressive literature to the tune of R27 million. The schools have been empowered on how to efficiently and effectively manage school libraries... Our goal in the 2006/07 financial year is to meet the international standards set by United Nations Educational, Scientific and Cultural Organization (UNESCO), and for this purpose R25 million has been set aside for providing libraries with literature and equipment.

Mpumalanga Province has four districts and the focus of the study is Nkangala District, whose seat is Middelburg. Nkangala District Municipality consists of 160 towns and villages. The most spoken language of its 1 020 592 people is IsiNdebele (Census 2001).

This study sought to establish the situation of rural schools in Nkangala, since without the necessary library resources they will not be able to attain the educational goal of the library.

### **1.3 STATEMENT OF THE PROBLEM**

School libraries are expected to support the curriculum; however some rural schools have no dedicated budgets to acquire relevant resources such as staff, materials, technologies and facilities for use by educators and learners. Undoubtedly, this has an impact on the school libraries as they fail to function efficiently and adhere to recommendations made in the Transformation of LIS Charter. There is also a need to understand what is happening with schools budgets, how they are apportioned, and budget policies. When school libraries fail to acquire the necessary resources they usually resort to fund raising and cooperating with the public/community libraries.

#### **1.3.1 Research questions**

- i) How do school libraries budgets in the chosen region measure up to the Transformation of LIS Charter?
- ii) How school libraries are funded?
- iii) What library facilities and resources do these schools have?
- iv) Do schools have policy for funding of their libraries?
- v) What does the policy say in terms of how much money/percentage of the school budget should be allocated to the school library?

- vi) What steps have these rural schools/school libraries put in place to fundraise?

### **1.3.2 Objectives of the study**

The specific objectives of this study are:

- i) To establish the school library model of schools have.
- ii) To establish which Nkangala rural schools received budgets earmarked for school libraries?
- iii) To identify the origin of financial resources for Nkangala rural schools.
- iv) To describe budget formulae being used to allocate funds for the school library and who is involved in the budget allocation at the school level.
- v) To identify information resources the school would like to purchase if funds are made available.
- vi) To recommend cooperation between schools and the public libraries and clarify the benefits to be derived thereof.

### **1.4 Rationale of the study**

It is important to budget for school libraries so that they can support and promote meaningful teaching and learning. The school library should be fully functional as it is a central information centre for lesson plans and supplementary information. All schools should have a budget for their libraries, and that school libraries should find ways of obtaining supplementary funds as well as getting a full-time librarian for effective service delivery. Therefore, the rationale for the study is to get a clear picture of situation with school library budgets of rural schools of the Nkangala region and secondly investigate ways and means by which libraries can be placed on a secure financial footing that would enable them to acquire and make accessible relevant resources as set by UNESCO guidelines for



school libraries.

### **1.5 Scope of the study**

The focus of the study is:

- i. One school with a library, which is proactive in rendering information service / a multimedia centre or a school library with computers and it is functional. The schools is expected to have library policies, accession registers, lending records or computer usage records which will serve as proof of participation in library activities.
- ii. A multimedia centre and/or a computer/library that is functional. School library with computers are included because of the e-education concept, which promotes mutual operation of school library with computers for better information retrieval, lesson plans and other purposes. Following this approach, some schools in Nkangala region may have a school library with computers.

The scope of the study also helps the researcher to conduct a study on a reasonable and controllable geographic area. Therefore, the study is limited to rural school libraries of Nkangala region in the Mpumalanga Province. The scope of the study is informed by time and financial constraints.

### **1.6 Significance of the study**

This is an important study in that school libraries are crucial as they provide supplementary educational materials, thus enhancing the provision of quality education. After experiencing inequalities brought about by apartheid policies, South Africa needs a strong educational system, especially one that promotes educational activities in rural areas. School libraries will help immensely in getting the learners cultivate the love of reading, which in turn will make them become informed and knowledgeable learners. It is therefore necessary to investigate how school libraries are functioning and what are resource challenges they face.

## **1.7 Theoretical framework for the study**

The study will use recommendations as indicated in “The Transformation of LIS Charter. Chapter 5”. The LIS charter guides school libraries on issues such as: budget, LIS policy making, governance and management of school LIS, school provisioning and expenditure, human resources and collaboration between school and public library. The recommendations are as follows:

1. The need to communicate and market more forcefully the role of school LIS in learning is clear. The underlying problem for school librarianship is a prevailing lack of understanding its role in teaching and learning. Many recommendations that follow involve structural shifts designed to improve the position of school LIS. However, other internal or subjective shifts in educator’s conceptions of learning and LIS will be required.
2. A national school LIS policy that provides norms and standards for the establishing and provisioning of LIS is the first step to redress the situation. It will act as an impetus for provincial education departments to recognise the need for LIS and will provide authority for the work of the school LIS support services. It will also persuade schools’ governing bodies to develop their own policies.
3. The national school LIS unit within the Department of Education should be re-established to drive the policy processes and guide the implementation nationwide. The unit needs to be highly placed in the departmental hierarchies, and led and staffed by qualified school librarians. The unit should work closely with all phases of education and with ICT and e-learning specialists.
4. Directorate status for the provincial Education LIS and Information Services responsible for school LIS will bolster their influence. Where school LIS support services do not exist or lack capacity, other role players, such as

community LIS, might be employed to establish and maintain school LIS on an agency basis.

5. Different conditions call for different models of service. Examples that might offer at least temporary solutions to the prevailing problems of lack of space include:
  - a. classroom collections in primary schools, replenished frequently from the stocks of education centres or community LIS
  - b. clustering schools around one facility in order to share resources and space.
  - c. container LIS.
6. In some communities, education and public LIS authorities might together establish dual use of school community LIS, available in the school day and open to the community after school hours. Memoranda of understanding and policy will clarify the roles and responsibilities of the governance structures.
7. Every school learner must have access to a living up-to- date collection of reading, learning and information resources. Whatever the delivery model, a minimum of three items per learner will be required. The initial establishing and provisioning of the chosen LIS model will be the responsibility of the provincial school LIS support services or an agreed upon alternative agent, in consultation with school management.
8. Thereafter, school LIS programmes will be sustained by annual allocations from schools' budgets. It is recommended that 10% of school's learning and teaching support materials (LTSM) budgets be assigned to the LIS programme. According to Western Cape DBE (2008) less money may be assigned to LTSM if the school has been allocating 10% of the LTSM allocation for the purchasing of library material to augment the library stock

and the total number of times in the library stock now constitutes the minimum international standard of 10 items per learner.

9. National policy will establish full- and part-time school librarian posts. In some circumstances, administrative staff might be appointed to perform the routine administration of a LIS- under the guidance of a part-time school librarian whose main focus will be information literacy education and the nurturing of reading literacy. LIS committees, comprising the LIS staff, senior managers, educators and parents, will draw up school LIS policy and will oversee and support its implementation.
10. Once posts exist, school librarian education programmes will expand. In partnership with provincial education departments, universities' education faculties and LIS schools will be encouraged to set up advanced certificate programmes and other courses for educators. UNISA should re-establish its school and children's librarianship programmes.
11. Both formal and informal education programmes should harness the knowledge and expertise of the existing cohort of excellent school librarians. Mentoring programmes should be established by means of collaboration among LIASA's SLYSIG and other provincial associations, provincial education departments and universities.
12. Diverse LIS collections and information literacy programmes offered by educators and school librarians together will nurture the critical thinking required in South Africa's democracy.
13. Finally, the urgent social, health and educational challenges facing South Africa's children and youth necessitate more active collaboration among sectors. National and provincial Education and Culture departments, public LIS authorities, professional associations, schools and universities need to share the responsibility of building effective LIS programmes that will help young people to make sense of their lives.

The study will also reflect on school library buildings and the section is covered under The South African National Minimum Norms and Standards for school infrastructure draft (2008) and it specifies that every large school is required to have a library of 80m<sup>2</sup> and a media centre of 120m<sup>2</sup>, whereas small and medium sized schools only require a media centre.

The UNESCO guidelines for school libraries recommend that school library materials should be at least 5% per student expenditure for the school system, exclusive of all salaries, special education expenses, transportation and capital improvement funds.

## **1.8 DEFINITION OF CONCEPTS**

- **Circuit office**

The circuit office of the Department of Education manages a cluster of schools (for example, 6 or 10 schools) in the same proximity.

- **District (Regional) Office**

The Regional Office is the section of the education department which follows the Provincial Office in rank. It deals with management of schools and the education sector. In the past the regional office was known as the regional office.

- **Functional library**

The definition of a functional library is from Dlamini and Brown (2010:2) where they explain the term “functionality” as very broad and basically means a library with resources that are borrowed by learners. In this study a functional library could be a mobile box or mobile trolley, classroom, storage room, or a

school library with computers. What is important is that there are books that are accessible mainly to learners.

- **Learning and teaching support material (LTSM)**

The Department of basic Education (DBE) defines LTSM as any material that supports and facilitates teaching and learning directly in the classroom or at home (homework). It includes the following (Western Cape DBE, 2008):

- Textbooks, readers, reference books, prescribed works, atlases and dictionaries
- Modules and workbooks
- Posters, maps and wall charts
- Educational board games
- Library material (fiction and non-fiction), reference books, posters and recording on videos, DVDs, audio cassettes, CDs, CD-Roms, multi-media, etc.
- Computer software and licensing
- Resource material for teachers, learners, classroom and library

- **School Library Committee/team**

The School Library Committee (SLC) is part of the organizational structure of the school library and carries out certain management activities (Mojapelo, 2008:87). School library committees are bodies responsible for the smooth running of school libraries. For school libraries to function effectively, school library committees are needed for planning, organising and controlling all activities related to school library matters. School library committees are responsible for drawing the budget, selecting, ordering, acquiring and weeding of library materials and resources (2008:87).

- **Outcomes Based education (OBE)**

OBE regards learning as an interactive process between and among educators and learners. The focus is on what learners should know and be able to do (knowledge, skills, attitudes and values). It places strong emphasis on cooperative learning, especially group work involving common tasks. The goal is to produce active and lifelong learners with a thirst for knowledge and a love of learning (South Africa Yearbook, 2004/2005).

- **Paper-budget**

The paper-budget is initiated and drawn by the provincial Department of Education, allocating funds for each school in the province. Copies of paper-budgets are then dispatched to each school indicating how much funds the schools have been allocated. The schools, in turn, access the allocated funds through the regional finance section. Different budgeting approaches include incremental (line-item) budgeting, programme (functional) budgeting and zero-base budgeting (ZBB), but most school libraries use incremental budgeting approach. Under incremental budgeting, each agency (school) simply adjusts each line item by a given percentage to account for inflation in compiling its budget for the coming year (Langa and Jerome, 2004).

- **Revised National Curriculum Statement (RNCS)**

This is a revised curriculum meant to strengthen Curriculum 2005. The key features of the revised national curriculum include comprehensive outcomes and assessment standards, which indicate the knowledge and skills required for each grade and learning area, and how progress should be assessed.

- **School Governing Body**

School Governing Body is a body of parents, educators, the principals and learner representatives that is democratically elected tri-annually to perform governance functions for a school as contemplated in S16 (1) of the South

African School Act (SASA). Section 23 (6) provides for the cooption of community members to assist in discharging its functions, who also become SGB members. This body also determines the policies and rules by which a school is organized and controlled (DoE 2002:8).

- **School library**

School library is a library which provides access for learners and teachers to a wide variety of curriculum support services. Other terms in use in South African schools include “media centres”, “learning centres”, and “information-“ and “knowledge centres”. A modern school library service provides access to and education in the use of a wide range of learning, information and reading resources – print, audiovisual, digital and online (School libraries, [www.thutong.doe.gov.za](http://www.thutong.doe.gov.za)).

- According to the National Guidelines for School Library Services there are four levels of library and information services in the education system, namely, national, provincial, district and school levels. This study focuses on the school level. The libraries at this level include mobile/trolley libraries, cluster libraries, classroom, centralised and school community library.
  - **Mobile box/trolley libraries:** A mobile box/trolley library refers to the steel container of books with wheels (about 180cm x 120cm) which can be moved from one classroom to the next and it is easily locked up. According to Baird (1994) a bookcase (about 180cm x 120cm) with five shelves would hold 150 books.
  - **Cluster library:** A library placed in one school shared by two or more schools within close proximity.
  - **Classroom library:** can consist of a box, a shelf or a cupboard in class appropriate to the level of the learners and to the curriculum.



- **Centralised school library:** this type of library ideally located within or next to computer centre and called library computer room.
- **School community library:** library set up in school primarily for use by learners and teachers during school days, but which also cater for community members after hours.
- **Staffroom library:** The staffroom library is a mini library of racks which is usually kept open in the staffroom and is usually managed by the teacher-librarian.

- **School library with computers**

School library with a computer centre is also a media centre as it houses books and computers in the same building. The computers are also meant for learners' use.

- **Section 21 schools**

Section 21 schools are ordinary public schools in townships/villages which were never urban / Model C schools.

- **Teacher- librarian**

Teacher librarian is a generic term for the various names used in schools for teachers who manage the resource collection, for example, librarians, media teachers, resource centre teachers and information specialists (KwaZulu – Natal Department of Education, 2005:8 cited by Hoskins, 2007: 61)

## **1.9 PROPOSED OUTLINE OF THE CHAPTERS**

### **Chapter 1: Introduction**

Background of the study is outlined in this chapter as the foundation for more insight and clarity.

## **Chapter 2: Literature review**

The chapter gives an outline of background information on budgetary issues as related to school libraries, resources, policies, staffing and facilities, before getting into details with the research design. Literature review serves as foundation for better understanding and insight of the topic under study.

## **Chapter 3: Research methodology**

The chapter discusses the research methodology, the population and the sample as implemented in the study. The questionnaire as a survey method was distributed to the sample to collect relevant data on budgetary constraints of teacher-librarians in the rural Nkangala region.

## **Chapter 4: Data analysis and interpretation**

The chapter gives the summary of content of the results as given by the respondents. It links the data collected, possible comments on inputs made and interpretation of data as discussed in the next chapter. The researcher also gives her interpretations of the results according to the reviewed literature and set objectives of the study as indicated in chapter one. It is important to show better understanding, insight and harmony of all the chapters dealt with.

## **Chapter 5: Summary, conclusion and recommendations**

The chapter gives the summary of the whole study as discussed in previous chapters, the major findings and conclusion of the study and recommendations for further research.

## **1.10 SUMMARY OF THE CHAPTER**

In summary, chapter 1 gives the background information of the study. It also covers the place where the problem originates (Nkangala), the population under study (teacher-librarians), the significance of the study, objectives of study, research questions, rationale of the study, literature review and research design.

There is no way to deny the importance of school libraries and the fact that research has shown the benefits that learners and teachers accrue from having functional school libraries to support the curriculum. What still remains a challenge is funding that is needed mainly to address rural school libraries. Alternative funding method is also an important issue that needs to be adopted and tried by school libraries.

## CHAPTER TWO

### LITERATURE REVIEW

#### 2.1 INTRODUCTION

Bless and Higson-Smith (1995:84) point out that the purpose of a literature review is to familiarize the researcher with the latest developments in the area of research, as well as in related areas. In particular, the researcher should become acquainted with the problems, research question(s) and results obtained by previous research in order to avoid duplicating efforts, but to widen and deepen them, to use previous results as a starting point for new research.

In order to identify relevant information on school libraries budgets, resources, staffing and facilities the researcher read books and journal articles, government documents on education. Searches were also done on Google scholar, Ask.com, findarticles.com, mamma.com websites and online databases such as Ebcobhost and SABINET. International and national librarians/authors such as Curry, Thiessen & Kelley (2002); Mahmood, Hameed & Haider (2006); Mojapelo (2008), and others have advocated the issue of budget for school libraries in order to support teaching and learning, and their works were consulted.

In England, Curry, Thiessen & Kelley (2002: 1) emphasises the problems related to fair funding of libraries (including school libraries) to raise the standards of quality life in developing communities in the globalization era.

In the United States, Snyder (2000: 82) conducted a study where he indicated that inadequate budget allocation for school libraries may lead to poor performance and service delivery.

In Pakistan, Mahmood, Hameed & Haider (2006) remarks that it is surprising that although all libraries play a vital role in education, social and economic development; in times of financial crisis the government cuts library budgets despite the fact that they are not funded adequately. In the earlier work

Mahmood (2003) suggests alternative funding models for Pakistan libraries and was presented for validation before national and international experts in the field of library science.

On Nigerian schools, Moja (2000: 12) reports on the importance of adequate funding, policy making as the main key of transforming the educational systems and upliftment of the life of citizens. She complains that inadequate funding of education has been one of the most significant causes of the low quality of much of the education offered at all levels (2000: 41).

Looking at the national research so much has been written on Mpumalanga school libraries, but the studies do not yet cover the functioning rural school libraries in the Nkangala region.

## **2.2 Funding of school libraries in support of the curriculum**

De Vries (2003: 121-131) mentions the following aspects as important for South African school libraries:

- They are the heart of Outcomes-Based Education (OBE), and as such should be funded by the provincial government.
- The state needs to fund schools from public revenue on an equitable basis.

Public schools in terms of SASA would normally receive funds from a combination of the following sources (Mbatsane, 2006:24):

- State subsidy
- School fees
- Donation and fundraising.

According to Mbatsane (2006:24) in South Africa the state subsidy is granted on a sliding scale according to quintiles which define the poverty ranking of schools. The recent policy (DoE), indicate that schools within the first and second quintiles

can apply to be non-fee charging schools, assists parents, but it does not change patterns of resources disparity (Wessels, 2010: 40). As Mbatsane (2006:24) comments, most schools in Mpumalanga are located within poor communities; SGBs rely solely on the state subsidy for their school budgets.

Motala and Pampallis as cited by Mbatsane (2006: 24) emphasises that the subsequent lack of sufficient public funding for education has resulted in a situation where the affluent subsidise their children's education with private resources. School Library ([www.thutong.doe.gov.za](http://www.thutong.doe.gov.za)) comment confirms that school libraries in independent or private schools, including the so-called ex model C schools, are well-equipped and run by professional librarians. The various authors agree that these schools benefit from suitable annual budgets to keep the libraries in line with first world school libraries elsewhere. Wessels (2010:40) cites Hart and Zinn (2007) as they agree that few school libraries that still flourish with trained school librarians are paid for by SGB funds and are in affluent schools.

However, libraries in former 'black' schools and rural schools remain desperately inadequate or non-existent. Most of the rural schools have to rely on box collections, mobile boxes/ trolleys or a small classroom or storeroom type of alternative models to a traditional library. However, Krolak (2005:5) is of the opinion that it is better to have a single set of books in a classroom than to have no reading material at all. Krolak (2005:5) adds that libraries rotating boxes of books and reading materials are popular.

### 2.2.1 Funds for facilities

Funds are financial resources which are used to purchase facilities and materials so that the library can meet its aims and objectives (Mojapelo, 2008: 29). One cannot deny that schools need to have decent school libraries. According to Mojapelo (2008: 39) facilities should be planned carefully to suit the needs of the learners and teachers. Funds are needed to buy learning resources in various formats. Funds are also needed to pay electricity, telephones and fax bills and to

maintain buildings and furniture. Electronic media such as computers and their equipment are expensive and more funds are needed to purchase them.

Tilke (2002: 118) mentions key aspects of a school library budget which need to be considered during the budgeting process, which include resources, standing orders and subscriptions (e.g., annual publications, periodicals, newspapers and databases/online services), common services/cost centre (e.g., caretaking, cleaning, electricity and copyright license fees), stationery and equipment (e.g. photocopier/computer maintenance and binding), staff costs, and training. Resources include books, audiovisuals, compact discs, DVDs, videos, CD-ROMs, posters and artifacts.

### 2.2.2 Funds for staffing

Zinn (2006: 22) remarks that in South Africa whilst changes in curriculum were being implemented, school libraries, where they existed before, were closing down as personnel were being cut. In schools with libraries, there are teacher-librarians who hold specific library qualification, whereas in some schools it is not a case. According to Mojapelo (2008:33) the teacher-librarian must work in the school library full-time to attend to the information needs of educators and learners, and should not be given any other teaching commitments in the school.

Unfortunately, this is not a case with most schools, including the previously advantaged under apartheid education, the schools resource personnel have been redeployed within the school and in some instances to other schools (Govender, 2006). The resource centres are closed for most of the day because teacher-librarians have been redeployed into main stream teaching of examination subjects. McGregor (2009) agrees that DoE offers no specialists school librarian posts. All posts are for teachers, and most schools cannot spare a teacher to run library because of high learner: teacher ratios. In response to EE letter on the provision of human resources for school libraries, Soobrayan explains “In respect of the issue of provisioning of human resources for librarians, I wish to emphasise my stance on the issue, namely that the provisioning of

librarians will have to be made within the context of broad post provisioning according to priority needs in the system. This clearly does not mean that there will not be any provision of librarians as you have recorded in your letter but rather that areas of priority will be addressed first, for example, the first priority for the department will be to ensure that there is provision of teachers for the delivery of the National Curriculum Statement to classes with no more than 40 learners (2010:3).

In 2010, Dlamini and Brown (2010) points out that after sixteen years of democracy, there are still wide differences between schools. Schools in previously white areas are able to charge high fees. Although they receive less from government than schools in poor areas, they are still able to provide education of a higher quality. Quite a number of them have maintained their libraries with full-time teacher-librarians funded by the school. Black parents, who can afford to, send their children to these schools, with the result that schools in black areas are left with children from poor families only. A large number of the schools in disadvantaged areas have been declared no-fee schools and receive more money from the state, but not enough to enable them to meet all the demands of quality education, including libraries. There are schools in black areas that have set up libraries with part-time staffing by teachers. These are the shining exceptions that have done it without financial support from the government (2010).

The school librarian performs four leadership main roles: teacher, instructional partner, information specialist, and programme coordinator.

- In the teacher role, the school librarians develop and implement curricula relating to information literacy and inquiry. School librarians may read to children, assist them in selecting books, and assist with schoolwork.



- In the instructional role, school librarians collaborate with classroom teachers to create independent learners by fostering students' research, information literacy, technology and critical thinking skills.
- As information specialist, school librarians develop a resource base for the school by using the curriculum and students interest to identify and obtain library materials, organize and maintain the library collection in order to promote independent reading and lifelong learning.

South Africa, 1995:25 as cited in Hart and Zinn (2007: 92) reports on the unavailability of many existing libraries, which are often used as classrooms or are shut for much of the day because the “librarian” is also a full-time teacher. In response to a letter from Equal Education on “The status and plan for implementation of the Draft Norms and Standards for School Infrastructure and the Draft National Policy for the Equitable Provision of an Enabling Physical Teaching and Learning Environment”, Soobrayan (2010:2) writes “It must be noted however, that the policy indicates that all new schools will have a library infrastructure and the provision for existing schools will depend on the size of the school. The school with less than 135 learners will be linked to mobile libraries etc; smaller schools i.e. between 200 and 300 learners will receive Media Centres i.e. school library with computers; medium and large schools will receive centralised libraries. These provisions will only be possible depending on available budget”.

### **2.3 Failure to fund school libraries**

In South Africa, advocacy on school library budgeting continues to be a problematic issue for librarians, teacher-librarians and library professional bodies. According to Aitchinson, (2006) there are still many schools without functioning libraries and many reasons are given. Although the strategic plan of the DoE was set a few years back to build and furnish schools with required libraries and resources, a number of authors agree that the movement is slow.

Johansson (2007) highlighted some of the problems that are reported to be common in many of the provinces in South Africa. They are:

- confusion as to who is responsible for the financing of curriculum-related resources;
- annual budgets seldom earmark funding for library-based resources and if they do, these are often reallocated when departments have overspent in other areas or have inadequate funds;
- lack of clear communication regarding funding policies, and
- when experiencing dwindling budget allocation, school libraries go to the private sector for financial support.

Mojapelo (2008:50) cites other authors who agree that budgetary constraints limit available resources, including personnel.

## **2.4 Policy guidelines, norms and standards for school libraries**

School library policies should be written down for adoption at national, provincial and school levels to ensure effective management of school libraries including budgeting. Stadler (1991: 22) states that the importance of the school library policy is to address the issue of democratization and to be responsive to local school and community needs. There is an agreement amongst librarians that the government should prioritise basic school facilities like the library to ensure that quality education standards are upheld in South Africa. Govender (2007:2) remarks that during his visit to schools, he found that, where they exist, many libraries needed resuscitation and more appropriate space in order to play an important role in the school's teaching and learning programme. Sometimes this led to books being stored in boxes at the back of the classrooms (2007:2).

There must be adequate financial support for school library buildings, resources and for the education of teacher – librarians (Mojapelo, 2008:50).

In South Africa, KwaZulu-Natal Province was the pioneer of the provincial school library policy (Rosario & Molapo, 2005: 1; Equal Education (2010) and Mpumalanga Department of Education in 2011 has finally come up with its own policy.

## **2.5 Fundraising at school level**

The problem of funding for school libraries is not new. Le Roux & Hendrickz (2006) agree that lack of funding is one single most factor influencing library facilities and influencing services. An earlier work by Lifer (1999: 50-52) state that since government funding in libraries is not enough (especially for on-line information systems), fundraising is therefore essential for better service delivery. Kurzeka & Charbeneau (2000:1) states that fundraising is essential to supplement government funds for libraries but requires clear realistic goals which should be pursued with optimum care and devotion. Witbooi (2006:48) indicates that the school library budget should be utilised to develop the collection and to fill the gaps in the donated items to meet the needs of the curriculum and the information needs of the community.

There are many ways that are employed by various school libraries to raise funds. Maruma (2005) in his study asked this question “What innovative methods do you use to raise funds? The responses were as follows:

- P1 Educational trips, civvies, projects, photos, school should ask the corporate world for donations.
- P2 Donations, concert, cake sale, fun days, raffle, market day, and school fees.
- P3 I will say vendors may sell food to educators and learners and pay monthly fee and film shows.
- P4 At our school we are renting classrooms, educational trips.

A few South African non profit organizations which are active in supporting schools with books and related resources are:

- Equal Education (2010) report states that it is running a project of requesting books and donations in order to improve school library service in South Africa.
- The Read, Educate and Develop (READ) is one organization that has assisted many rural and townships schools with books over the years.
- QIDS-UP is another donor project which provides 100 books per classroom project, and its aim is to provide core collections to kick-start libraries in poorest schools of the Western Cape.

Stakeholders such as private companies, parents, trusts, foundations and the South Africa's National Lottery are examples of financial sources that usually help school libraries. Other suppliers base their book donations on the schools examination results. Otike (1993) as cited by Anderson & Matthews (2010:570) and Anderson (2011: 4) explains that book donation comes in two forms, the solicited and the unsolicited. The solicited approach requires that the librarian present a case for a specific need to the donor, which the donor then endeavours to meet. In contrast the recipients of unsolicited donations do not have prior knowledge of the material they are receiving. Due to a lack of consultation with the recipients, unsolicited donations largely "comprise the materials that libraries would least wish to receive" yet as this type of donation is the easiest to obtain and it is the most common (2010:570).

A complaint raised by School libraries ([www.thutong.doe.gov.za](http://www.thutong.doe.gov.za)) is that the project donations are usually once-off and demand formidable project management skills and ongoing monitoring is required. A number of overseas non- governmental organisations have been involved in collecting books in their countries so that these books are distributed to developing countries. Curry, Thiessen and Kelley (2002:201) points out that in the past hundred years,

libraries and publishing companies shipped off surplus materials to well intentioned organisations that “dumped” those items in developing countries such as Africa. Donors paid little attention to the language, context of the materials, currency and the recipient countries were rarely, if ever, able to choose their own books. And even if the recipients could choose, they had little knowledge of what to request. In addition, they warn that filling library shelves with these irrelevant materials discourages use (2002:201).

Williams (2004:15) refutes the issue of donation of irrelevant materials by developed countries and explains the process of distribution carried out by Biblionef as not simply a matter of packing a box of books and sending off to whoever makes a request. Once a request is received, Biblionef SA determines the specific requirements of that particular group of children and of the area in which the school or organization is situated. The first stage involves establishing close links with local partners. In the second stage, new books specifically geared for the needs of that community or group are selected. If required stock is not immediately available books are re-edited, written or translated. In the final stage, books are distributed through libraries, schools, cultural centres and associations, under supervision of efficient local representative.

Curry, Thierry and Kelley (2002) cites Sharples and Bywater who recommend that some donors consider giving monetary grants that allow staff in libraries to select their own books. This will ensure relevancy and need to support local publishers. According to Brewer, Achilles and Fuhrman (1998) and Marsden (1997) is that some companies might not prefer to give out cash but can pay salary allowances.

Guidelines on effective management of donations/gifts are clearly laid out in the study conducted by Maruma (2005) entitled “The role of the school governing body in managing fundraising for public primary school in disadvantaged communities”.

Gerding (2006:1) also provides guidelines for fundraising policies which emphasize the importance for clarifying reasons behind a request for donations and handling procedures for libraries receiving gifts/donations.

## **2.6 The role of the SGB and SLC**

### **2.6.1 School Governing Bodies (SGBs)**

According to Van Wyk (2004: 53) the SGB has a vital role to fulfil in overseeing the financial management of the school fees and any other money which may be paid into the school's account. This role includes planning, reviewing, controlling and approving the school budget in accordance with the school's needs as presented by the principal. Ultimately SGBs are now have the authority to approve spending of school funds and thus decide whether to fund a library or not, but many of them do not show an understanding of the need for school libraries (Hart & Zinn, 2007:94). Some studies show that in most of the rural areas the SGBs of certain schools as argued by Motala and Pampallis in Mbatsane (2010:6) do not have the requisite skills and experience to exercise their powers. According to Van Wyk (2004:53) educators who participated in her study, educators had reservations about the SGB's competence to handle financial matter. As one explained: "The SGB is not well trained that is why they do not know what is expected of them with regard to the finances." Another added: "They only sign cheques, they don't work according to the budget. There is no financial committee. They do not participate in fund-raising of the school (2004:53)".

Mestry (2006: 28) agrees that many principals and SGB members are placed under tremendous pressure to manage their school finances because they are unable to work out practical solutions to financial problems, or account for their lack of financial knowledge, skills and expertise.

Maruma (2005) also indicates the special role SGBs play in managing public school funds (including budgeting for school libraries) for transparency and bridging serious financial constraints. It is important for the budgeting process (at the school level) to be transparent to all stakeholders, especially teacher-librarians for better service delivery like budget policy formulation and handling of budget funds. The more transparent the budgeting process, the easier it becomes to examine how much there still is to be generated through fundraising because both activities are intertwined. Govender (2007) and Mojapelo (2008:87) discuss the important role of the school library committee including budgeting. Involvement of SGBs and library committees in school library management promotes transparency in service delivery.

#### 2.6.2 School Library Committee(s)

It is important and compulsory for each school to have a School Library Committee (SLC). School library committee include educators, school administrators, learners' representatives, parents, teacher librarians and a public librarian. This committee is partly responsible for financing school libraries through organising fundraising, doing research and compiling lists of organizations, companies and agencies which can help with extra funds that would assist in running a better library service (Mojapelo 2008:51).

Mojapelo (2008:16) explains the importance of involving SGBs and library committees in school library management, including the formulation of budgeting policies and procedures.

### **2.7 Accountability towards school's budgets**

The future success of every information service is directly dependent on managerial planning, organising and controlling of financial resources (Roberts & Rowley, 2004: 185). It is therefore essential for teacher-librarians and principals to acquire the relevant skills for meaningful and efficient financial management and to keep a copy of the financial statement and inventory up to date at school.

Moja (2000:12) on Nigerian school libraries points that the management problems experienced at school level are as follows:

- i) inadequate book-keeping of records;
- ii) shortage of support and administrative staff;
- iii) inadequate budget control mechanisms.

She adds that to improve the management of school budget, the administration must become more goal-oriented. In addition, there is a need to establish transparent and democratic funding mechanisms with increased accountability. This would entail the use of generally acceptable accounting procedures by school administrators (2000: 12).

## **2.8 School library and public library cooperation**

The study by Lifer (1998: 46) supports the importance of cooperation across different library types (e.g. museum, public and education libraries) in order to supplement government budget. Shillinglaw and Thomas (1988:347) give reasons why libraries cooperate. The reasons are:

- the realization that it is not feasible for any library to attempt to be self-sufficient
- financial constraints
- a desire to provide improved access to a more comprehensive range of information.

Hart (2007: 1) highlights that the National Audit by the Department of Education (DoE) in 1997 revealed that because of financial problems, 30% of schools in South Africa have libraries. She adds that with less than 30% of South African schools having functional libraries and faced with demanding projects, school learners flock to public libraries (2007:10). The school library needs to form partnerships with other libraries at the local, regional and national levels to



improve its management and services, including acquiring scarce resources. User needs are vast and may not be easily catered by one library and due to cuts in the budget, sharing of resources through library cooperation is essential.

A study by Hendrikz (2002: 7) indicates that due to budgetary problems experienced by school libraries, UNESCO decided to draft guidelines for cooperation of public and school libraries in South Africa. Hart cited in Blake (2008: 69) mentions the importance of forming partnerships with public libraries for the purposes of resource sharing to complement the school library stock in order to overcome the challenge of insufficient budgets.

The community-school library model presupposes the involvement and financial commitment of the local community. However, the financial backing and other support by the provincial and local governments are crucially important to the success of this model Le Roux & Hendrikcz (2006:627). There should be a commitment by all cooperating partners to funding the combined school community library (Le Roux 2001: 228 cited in Le Roux & Hendrikcz 2006:622). This model has been adopted in Mpumalanga Province as there was a shortage of school and public libraries especially in the rural areas and this is in the interest of both school and community library authorities to share resources in order to bring library services to the whole community (Le Roux & Hendrikcz 2006:627). According to Hart (2009:4) South Africa lags far behind UNESCO standard for public library access. Mpumalanga needs 96 libraries (2009:4).

Public libraries in disadvantaged townships are indeed “doing the good task: of school libraries”. The learners rely almost exclusively on the public libraries for the school projects, homework and assignments (Hart, 2003: 80). It should also be mentioned that, due to poor living conditions, including lack of electricity and lack of space, the library often becomes the only space for economically disadvantaged South African students to do their schoolwork (Brown, 2004: 169). Hart & Zinn (2007:91) demonstrate that use of public libraries by school learners has increased dramatically since its introduction.

In Uganda, (Dent, 2006:404) teachers who use the community library prepare for their classes, read library materials to increase their subject expertise, and to prepare homework assignments. Teachers also use library materials to provide examples in subjects such as mathematics, and use supplementary materials such as maps and charts for classes such as Geography and Accounting (2006:404). According to De Groot and Branch (2009:53) public libraries play a very important role in children's development. These authors indicate that the public library can work together with school libraries to support children and young adults in gaining the necessary skills. They also stated that public libraries stand in for declining school libraries and learners had to go to public libraries to find information sources.

Reflecting on the situation, Hart (n.d. (a)) comments that the fate of the school library is even more precarious than in 1994 (De Groot and Branch, 2009:53). Hart and Zinn (2007:89) note that the optimism and potential for school libraries brought about by OBE is a "promise [that] remains unfulfilled". In 2010 the situation has not changed. Learners have to do research and the overcrowded and under-funded public libraries cannot meet the demand. One more challenge for public librarians is that they do not have day-to-day access to classroom as school librarians might not regard this as their responsibility.

Williams and Wavell (2002:7) indicates in their study on "Impact of school library services on achievement and learning in primary schools" the positive impact on cooperation with the public library. The type of relationships considered during analysis were: electronic network links (such as a shared catalogue); book talks by public library staff in the school; homework alerts to the public library; referral of more complex reference questions from the school library; bulk loan of books and other resources from the public library; and reading programmes at the public library.

However, Leach (2006:125) makes a comment that public libraries both in South Africa and internationally are under financial pressure owing, in large part, to a decline in public (or government) funding. The study by Hart (2006:80) confirms the heavy use of public libraries by school learners even though there are concerns whether a more active role should be expected of the public library. Some of these doubts emanate from concerns over capacity, the heavy use of the public library and the fear that it jeopardised their services to other groups in the community (2006:80). In addition, in mid-2004 the Working group on Libraries of the Print Industry Cluster Council (PICC) noted that in homeland areas and in the African townships of 'white' South Africa, there were virtually no library services. With underfunded public libraries school are not going to benefit at all.

Mpumalanga Province as a result, has adopted partnership between schools and public libraries. This cooperation can augment limited resources in schools. Where school libraries are scarce, the public library could fill the gap and vice versa (Tiemensma, 2006: 18).

In conclusion, Du Toit (2010) in her thesis "The KwaZulu-Natal school library policy and its feasibility for implementation in the province" recommends that partnerships and innovative service delivery solutions are required to address the backlog in school library provisioning, even if this intervention takes place initially only on a small scale.

## **2.9 SUMMARY OF THE CHAPTER**

School library budgeting should be based on a written budgeting policy to serve as a guideline. For the school library, budgeting occurs first at three levels; i.e. national, provincial, and regional. School funds may be supplemented by donations, gifts, trusts, bequeaths and fundraising. It is essential for school libraries to fundraise for better rendering of service since departmental budget is always below the level of the required needs of each learner's additional support material.

## **CHAPTER THREE**

### **RESEARCH METHODOLOGY**

#### **3.1 INTRODUCTION**

In the first chapter, it was shown that the core business in research is posing some important questions and answering them in a professional way. McEwan (2008: 87) alludes to that when he notes that the posing of research questions and answering them is done through descriptive research. Descriptive research describes the sample, establishes pattern in the data, and provides better context for interpreting and generalizing data.

#### **3.2 Research design**

Research design comes after having formulated the problem and the research question before starting with data collection. The research design in the present study is a survey method which enables the researcher to answer stated research questions, interact with the subjects or respondents, collect and analyze collected data. It is very important for any research design to show valuable properties such as scope, reliability and validity (Bodgan & Biklen, 1998: 49; McEwan, 2008: 89).

##### **3.2.1 Properties of research design**

It is important to briefly discuss the properties of the research design of this study; i.e. scope, validity and reliability.

##### **i) Scope**

Scope of the research design refers to reflection of harmony of thoughts and sense of purpose. It is essential for any research to be goal focused, flexible, show integrity and produce valuable outcomes which may be generalized in other research studies (Gustafson & Smith, 1994: 12). The study focused on budgets for rural school libraries in the Nkangala region which are 10 kilometres

away from town. The schools have functional libraries of different types and appear in a list provided by the Mpumalanga Department of Education.

## **ii) Reliability**

According to Gray (2009: 158) reliability is an indication of consistency between two measures of the same thing. For instance, the same study or instrument administered by two different people at different times, using the same instrument should yield the same results. There must be consistency in the results made by different researchers or by the same researcher over time, i.e., reliability. Researchers view reliability as a fit between what they record as data and what actually occurs in the setting under study, rather than the literal consistency across different observations (Bodgan & Biklen, 1998: 35). A structured questionnaire was designed to collect the data. The distribution and the return of the questionnaires had to be done over a month. It was important that the questionnaire be completed by teacher-librarians, principals and head of departments who have more knowledge about the functioning of their school libraries.

## **iii) Validity**

Research must measure what it was intended to measure i.e., validity. In order to achieve validity, the research instrument subject area and operationally defined subject area must exactly match (Gray, 2009: 155). It is important for the outside world to have confidence in the results of conducted research (McEwan, 2008:89). Research content needs to show clear coherence of supportive information in order to comply with validity. In order to have valid results the researcher used a structured questionnaire.

## **3.3 Population**

It is important for the researcher to clearly define the target population in this study as the schools with libraries rendering service to users. In this study, the population of the study consists of 390 school libraries in rural areas within the

Nkangala region (as appeared on the 2008 Physical Resources list of school libraries for Nkangala region, Mpumalanga Province, South Africa Republic. (Department of Education, 2008:1-19). The population was chosen because it is not known which school library resources they have acquired since the introduction of Curriculum 2005 and RNCS in line with the UNESCO requirements. In case of no budgets are available it is essential to establish the challenges and to provide solutions.

### **3.3.1 Sample**

Adams, Khan Raeside & White (2007: 91) state that a sample size determination is essential in any survey research, but it is associated with time and cost. For instance in this study time and cost were economised by mailing the questionnaire instead of taking them personally one by one to all the schools or conducting face to face interviews. The key aspect in research is to determine a sample which brings about significant results, but it is also essential not to under-size or over-size it since time and costs are involved.

At least 195 rural school libraries out of 390 were sampled from the Mpumalanga list of schools with libraries using systematic random sampling method. According to Lunsford and Lunsford (1995) systematic random sampling method is a method frequently chosen for its simplicity because it is a periodic process (1, 2, 46). In this procedure, the researcher determines the total number of units in the sampling frame and decides on the size of the sample (Grinnell, 1993: 158). Every second rural school library on the list was included. Out of 195 rural schools, seven were used in the pilot study and 188 schools completed the final questionnaire.

The sample consisted of:

- 188 schools with a physical library structure/ school library with computers / mobile box/ trolley/classroom corner box/staffroom box collection/storeroom collection.

- School libraries in all the four sub-regions of the Nkangala region (i.e. KwaMhlanga, Middelburg 3/Witbank 3, Moretele and Siyabuswa).
- Only higher grades, because foundation phase always has corner libraries (Schools are classified according to phases, i.e., FET (Grade 10-12), (Grade 7-9) or senior (Grade 4-6) or intermediate).
- Schools that are in rural areas.

In order to have relevant schools and avoid schools not falling within the identified specifications, the lists of schools with library structures were obtained from the Mpumalanga DoE – (Department of Education, 2007). The sample excluded the following schools:

- All schools in the urban areas (town and townships) since the study focused on rural parts of the Nkangala region.
- Delmas, Middelburg/Witbank 1 & 2 and Watervalboven circuits (i.e. more than 20 km from the nearby towns). Delmas circuit, which is less than 20 km from town, Middelburg/Witbank 1 & 2 townships less than 10km and Watervalboven circuit, is less than 10km from town, but include far areas like Belfast (which is about 100 km apart).
- Primary schools (Foundation phase). Almost all primary schools operate with corner libraries. Also some of these rural schools fall under the quintile system.

Out of 188 school libraries 81 schools responded. According to Gray (2009: 149), a good response rate should be above 50% but normal reliable results will be contained between 41% and 49% response rate of the entire population.

Other respondents failed to return the questionnaire back to the regional offices. Out of 107 schools which did not respond, thirty (30) were later telephonically contacted by the researcher to check whether they received the questionnaires and what the reasons for not returning them were. Those thirty schools pointed out that they did not:

- return the questionnaire because they did not have school libraries.
- have budgets earmarked for the school library.

The list of schools with libraries was not reliable as it listed these schools as having libraries yet later enquiries made by the researcher as to whether they collected and returned the questionnaires the respondents denied that their schools had libraries. With some schools there was no one to pick up the phones and is not clear whether it was because there was no one to pick up the phone or the phones were faulty.

Realising that it was impossible to get hold of other schools telephonically and assuming that they did not have any libraries, the researcher settled for a lower response rate. A larger sample would have enhanced the study, but one had to consider the telephone costs that the researcher incurred trying to establish the reasons for not returning the questionnaires. It was also a matter of making sure that the study is completed in time.

### **3.4 DATA COLLECTION METHOD**

Data collection is a critical stage in most research projects. The various data collection methods such as interviews, questionnaires and document analysis are used in research studies, but in this study a questionnaire was used.



## **a) Questionnaire**

A questionnaire is used as it is valuable because it saves labour, time, and money. Moolman (1992: 34) defines a questionnaire as a list of questions, sent or handed to a respondent with the request that he/she completes and returns it to the compiler.

The questionnaire covered the following categories:

<b>Questions 1- 6</b>	:	Information about the school and the person in charge
<b>Question 7</b>	:	The type of library
<b>Question 8</b>	:	School library policy
<b>Questions 9 - 11</b>	:	Budget allocation
<b>Question 12</b>	:	Changes in the budget policy
<b>Question 13 -14, 16:</b>	:	Sources of funding and the amounts
<b>Question 17-18</b>	:	Current library needs

### **3.4.1 Procedure for data collection**

Permission was requested from the Mpumalanga DoE senior management in the region (i.e. circuit managers and principals) to distribute the questionnaires to schools. Through the covering letter, the researcher explained the contents of the questionnaire to circuits and schools. The covering letter also emphasized when to return the questionnaires. Respondents were given one month to respond to the questionnaire; and follow up on no-responses was done for three weeks after the one month waiting period assuming that the mail was delayed.

The questionnaires were put in addressed stamped envelopes and self-addressed envelopes with the return address included. The principals of schools collected and returned the questionnaire had to ensure that they were returned back to the circuit office. Questionnaires were distributed via circuit offices because this is where principals normally send and collect their schools' correspondence on daily basis from Nkangala regional offices.

### **i) Pilot study**

A pilot study or feasibility study is a small experiment designed to test logistics and gather information prior to a larger study. It is meant to improve the latter's quality and efficiency. A pilot study can reveal deficiencies in the design of a proposed experiment or procedure, and these can then be addressed before time and resources are expended on large scale studies. A good research strategy requires careful planning and a pilot study will often be a part of this strategy (Gray, 2009: 359).

It became important to conduct a pilot study before mailing the questionnaire using seven out of 195 teacher-librarians from different schools. A pilot study helps to establish the feasibility of the study and to anticipate logistical problems related to the study. There were no weaknesses identified from the questionnaire after checking the comments made by the respondents. The results of the pilot study were not indicated because the main reason of piloting the questionnaire was to check whether the questionnaire would be easily understood, and to find out the length it would take for one to complete it.

### **3.5 SUMMARY OF THE CHAPTER**

It is not easy to conduct research on the whole population and therefore careful selection of the sample is essential. The questionnaire was used as a survey research method which allowed us to collect reliable and valid data on budgetary constraints as experienced by school libraries in the rural areas of Nkangala region. Interviews were informally conducted in preparation of the final questionnaire.

## **CHAPTER FOUR**

### **DATA ANALYSIS AND INTERPRETATION**

#### **4.1 INTRODUCTION**

The previous chapter provides background on data collection methods used, the procedure used to collect data using the questionnaire. Data analysis concerns the translation or rearrangement of raw data into summary statements, that is, the gathering and explanation of the content of a text (Gustafson & Smith, 1994: 136).

#### **4. 2. PRESENTATION OF RESEARCH RESULTS**

Data are presented by use of tables and explanations below the tables. Questions are analyzed in the sequence they appear in the distributed questionnaire and descriptive titles for the tables and labels for columns and rows are given. The number of respondents and percentages are displayed in the tables.

##### **4.2.1 Questionnaire distribution**

Out of the 188 questionnaires 81 schools returned the questionnaires within the stipulated time frame.

##### **4.2.2 Name of schools**

Even though the researcher treated the names of the respondents and the school confidential, it was important for each school to write down its name in order for the researcher to check the school's name against the Mpumalanga Department of Education list of functional libraries, and whether the selected schools responded to the questionnaire. The name of the respondents were not going to appear in the study but are meant to be used in case the researcher needed to contact those who did not respond.

#### 4.2.3: School libraries per sub-region

Table 2: Number of responses per sub-region

<b>Sub-region</b>	<b>Number of school libraries</b>	<b>%</b>
KwaMhlanga	41	51
Moretele	15	18.5
Middelburg / Witbank 3	08	9.5
Siyabuswa	17	21
<b>TOTAL</b>	<b>81</b>	<b>100</b>

The number of schools with functional libraries is not the same in each district.

#### 4.2.4: Position respondents held

Table 3: Position of respondents

Responses from different sub-regions are as follows:

<b>Sub-region</b>	<b>Teacher-librarians</b>	<b>Principals/HODs</b>
KwaMhlanga	36	5
Moretele	12	3
Middelburg / Witbank 3	5	3
Siyabuswa	13	4
<b>Sub-totals</b>	<b>66 (82%)</b>	<b>15 (18%)</b>

The results show that 64 respondents were teacher-librarians, while 17 were principals and HODs who were in charge of library operations. Respondents in this study refer mainly to educators who are teacher-librarians at schools plus principals and HODs who are in charge as supervisors of school support units such as the school library.

#### 4.2.5: Service of the respondents in the position

*Table 4: How long (service) has the respondent been in this position?*

Under this question the respondents had to indicate the year they were appointed to their position as a teacher-librarian, principal or teacher. The responses were then categorised into three periods: 0 -1 year, 2 -3 years and 4 years upwards. For the four sub-regions, the results are as follows:

<b>Sub-region</b>	<b>0- 1 year</b>	<b>2-3 years</b>	<b>4 years plus</b>
– KwaMhlanga	14	8	19
– Moretele	4	3	8
– Middelburg / Witbank 3	1	3	4
– <i>Siyabuswa</i>	5	1	11
<b>Sub-totals</b>	<b>24 (29%)</b>	<b>15 18.5%)</b>	<b>42 (52%)</b>

One respondent did not answer this question, but from the table one is able to conclude that many teacher-librarians in the region 42 (52%) have experience of more than 4 years, followed by 24 (29%) respondents who have been responsible as teacher – librarians over a period that is less than a year. A lesser group of 15 (18.5%) is from 2 -3 years. Principals and HODs are responsible for the general management of the schools and the school libraries, which is why they completed the questionnaire.

#### 4.2.6: Library service model used by your school

Table 5: Library service at your school

<b>Sub-region</b>	Mobile box / trolley	Separate classroom	Storeroom - (library)	School library with computers	Classroom-corner box	Staff-room corner
KwaMhlanga	21	7	7	1	2	3
Moretele	7	5	3	0	0	0
Middelburg / Witbank 3	3	2	1	1	0	1
Siyabuswa	6	4	4	0	0	3
<b>Sub-totals</b>	<b>37</b> <b>(46%)</b>	<b>18</b> <b>(22%)</b>	<b>15</b> <b>(18.5%)</b>	<b>2</b> <b>(2.5%)</b>	<b>2</b> <b>(2.5%)</b>	<b>7</b> <b>(8.5%)</b>

According to the data presented in the above table, 18 (22%) schools operate with separate room libraries (this could be a classroom that has been converted into a library) and 37(46%) with mobile box/trolley libraries (for schools) which is moved from one class to another. A trolley box was added as another category which the researcher combined with a mobile box as they are usually rotated from one classroom to another.

At least 2 (2.5%) have a school library with computers, while another 2 (2.5%) rely on classroom corner boxes, whereas others have staffroom corner libraries 7(8.5%) which is housed in the staffroom used by teachers as well. Another 15 (18%) schools have store-room libraries. A storeroom library is a storage room for keeping equipment that is not frequently used since there is no building this storage facility is used but is not used for sitting. These are different models used mainly by poor school libraries as substitute to the traditional functional library with buildings.

#### 4.2.7: Budget policy

Table 6: Do you have a budget policy at your school?

This question intended to find out if respondents' school libraries had budget policies and if not they were to elaborate on their responses. The data collected from all the regions revealed that out of 81 respondents, 7 (9%) had budget policies, whereas 74 (91%) did not have budget policies.

<b>Budget policy availability</b>	<b>Responses</b>	<b>%</b>
YES	7	9
NO	74	91
<b>TOTAL</b>	<b>81</b>	<b>100</b>

Reasons given by 74 (91%) school libraries why they did not have budget policies are as follows:

- Twenty (27%) schools do not have budget policies due to financial constraints.
- Another 10 (13.5%) schools indicated that it was worthless to draw a budget policy without funds.
- Six (8.1%) schools mentioned that they were not aware that it is important to have one and they needed to be capacitated with “how- to- do it” skills.
- Thirty-eight (51.4%) respondents who indicated that they did not to have a budget policy did not elaborate on their answers.

#### 4.2.8: Budget formula

Table 6: Which budget formula is your school/school library using?

Seven schools indicated to have the budget policy as shown in Table 4.2.8, and below is the budget formulae as per sub-regions:

Regions	Budget formula
<b>KwaMhlanga:</b>	<b>Two</b> school libraries have budget policies although they did not indicate the budget formula they are using. From the responses they conduct needs analysis and then decide how much goes into the school library.
<b>Moretele</b>	No budget formula named/used. There are no budget policies in all the 17 schools.
<b>Middelburg/Witbank 3</b>	<b>Two</b> schools used School Governing Body's (SGB's) decision (No budget formula indicated). <b>One</b> school used a 2.6% of budget formula as specified in the National Norms and Standards allocations of how much schools should provide for school libraries. <b>One</b> school library used a zero-based budget formula.
<b>Siyabuswa</b>	<b>One</b> school library with a budget policy used incremental (line-item) budget.

The results of the study reveal that out of seven schools with budget policies only two schools used zero based and line item budget methods. The other five seemed not to understand the question, they did not know what a budget formula is and they understood the term procedure to mean a way of doing things. It seems they were not familiar with the financial jargon.



Instead the respondents indicated the following as budget formulas they used:

- norms and standards guidelines, the decision of the SGB and decision based on needs analysis.

The majority of the schools of 74 (91%) respondents in the four Nkangala regions did not respond to this question as indicated in table 4.2.7. Some schools indicated that since there was no budget, no budget formula was used.

#### 4.2.9: Who decide on budget allocation?

*Table 8: Who decides how much to allocate for your library and/or computer centre?*

Responses are given sub-regionally as follows:

<b>Sub-region</b>	<b>SGB/School Budget Team</b>	<b>Province</b>
KwaMhlanga	15	2
Moretele	3	1
Middelburg / Witbank 3	5	0
Siyabuswa	4	1
<b>Sub- totals</b>	<b>27 (33.3%)</b>	<b>4 (5%)</b>

On the question who decides how much to allocate for the library and/or computer centre, 27 (33.3%) of the respondents in all the three sub-regions indicated that it was the School Governing Body (SGB) or the School's Budget Team (SBT). Four (5%) respondents indicated the provincial office. Fifty (61.7%) respondents did not respond to the question.

#### 4.2.10: Budget decision

*Table 9: How is the budget decided upon? (i.e., how much goes into what?)*

This question was close-ended with an explanation and the researcher categorised responses as follows:

- negative (never done)
- positive (with a clear formula) and
- Other (needs analysis, available budget and as per provincial supplied paper budget).

Responses were given according to sub-regions as follows:

<b>Sub-region</b>	<b>Negative</b>	<b>Positive</b>	<b>Other</b>
KwaMhlanga	27	2	3
Moretele	15	1	1
Middelburg /Witbank 3	2	1	1
Siyabuswa	8	2	5
<b>Sub –totals</b>	<b>52 (64.2%)</b>	<b>6 (7.4%)</b>	<b>10 (12.4%)</b>

From the above table 4.2.10, it is evident that 52 (64.2%) of the respondents in the four sub-regions do not base the decision on any guideline, simply because there is no budget for the school library. Only 6 (7.4%) follows a clear formula which they did not explain and 10 (12.4%) base their decision either on assessment/analysis of needs or available budget. Thirteen (16%) schools did not respond to this question.

#### 4.2.11: Changes in funding percentages

Table 10: Any changes in your funding percentage and practice for the past three years?

The responses to the question were categorised in this way;

- no response
- no changes
- annual increase or change due to donations.

Responses were categorised sub-regionally as follows:

Region	Annual 10% increase	No changes	No response
KwaMhlanga	2	14	25
Moretele	0	8	7
Middelburg/Witbank 3	2	4	2
Siyabuswa	0	5	12
<b>Sub - totals</b>	<b>4 (5%)</b>	<b>31 (38%)</b>	<b>46 (57%)</b>

The results show that 4 (5%) schools had an increase in their budget for the past 3 years even though the amounts for certain years are not reflected as in table 4.2.14. Two schools indicated an increase as coming from donated funds by mining companies where schools are located as an act of goodwill or ploughing back and/or developing the villages/communities. Another 31 (38%) respondents in the three sub-regions indicated that there hasn't been any change in the budget over a period of three years and 46 (57%) of the respondents did not respond.

#### 4.2.12: Sources of funding

Table 11: *What are the sources of funding for your school library, and /or computer center?*

The question required a YES or NO response. The respondents had to indicate sources of funding for any school library model they are using. Responses were analysed sub-regionally as follows:

<b>Region</b>	<b>Provincial Dept</b>	<b>Regional Dept</b>	<b>School</b>	<b>Other- Donors</b>
KwaMhlanga	37	4	0	0
Moretele	15	0	0	0
Middelburg/Witbank 3	5	1	0	2
Siyabuswa	15	2	0	0
<b>Sub- totals</b>	<b>72 (88.8%)</b>	<b>7 (8.6%)</b>	<b>0 (0%)</b>	<b>2 (2.5%)</b>

Results show that the majority of 72 (88.8%) school libraries regarded the main source of funding as the provincial department. About 7(8.6%) (All the four sub-regions) indicated the regional office as a source of funding; maybe this is because paper budget comes straight from head office, whereas payments are made by the regional office. Only 2 (2.5%) regarded donors as source of funding.

#### 4.2.13: Source of finding and purchases

Table 12: Name the sources of funding for the specified items in your library.

Only numbers and summaries of ideas per sub-region are given below, but no percentages:

Sub region	Number of respondents
<b>KwaMhlanga:</b>	<p><b>Thirty</b> school libraries in the area rely basically on the provincial department for funding of building construction, maintenance, furniture and equipment, books, journals and other non-print materials.</p> <p><b>Eleven</b> respondents left this question unanswered.</p>
<b>Moretele:</b>	<p><b>Three</b> school libraries which can afford few journals, books, construction and maintenance of buildings, furniture and equipment and general collection of resources in support of the curriculum rely on the provincial department.</p> <p><b>One</b> school indicated that it has a library building which has not been utilised for the past 15 years due to lack of relevant resources (NB! the source of the building was not mentioned). They rely on textbooks as they are always available for the learners, obviously supplied by the province.</p> <p><b>Eleven</b> schools did not respond to this question.</p>

<p><b>Middelburg/Witbank</b> <b>3</b></p>	<p><b>One</b> school library responded that it is responsible for furniture, books, journals, audiovisuals and maintenance from its school funds, but the provincial department was responsible for the library building construction.</p> <p><b>One</b> school indicated that it has a media centre.</p> <p><b>One</b> school library is funded by the provincial department and a local mining company.</p> <p><b>Five</b> schools did not tick their source(s) of funding.</p>
<p><b>Siyabuswa:</b></p>	<p><b>Eleven</b> respondents from the sub-region revealed that public school libraries in the area depend on the provincial department for library building construction, maintenance, furniture and equipment, books, journals, non-print materials (e.g. audiovisuals).</p> <p><b>One</b> school also indicated that it has a library structure which was built by the provincial department, but has no materials.</p> <p><b>Three</b> school libraries in the area indicated that they buy few books from school funds but they rely heavily on the provincial department for major supply and provisioning of multimedia resources.</p> <p><b>Two</b> schools did not respond to the question.</p>

The provincial department is regarded as the main source for provisioning of the basic infrastructure of effective service for the public school library in Nkangala region. The (South Africa (Republic) - Department of Education, 2005b) emphasizes the importance of multimedia information resources in the library to enhance teaching and learning. It is only one school under Middelburg/Witbank 3 that uses school funds even though this was not indicated in table 4.2.12. The two schools which indicated in table 4.2.12 have additional funding from the provincial office and donors. One of the two schools library with computers added that the provincial department is failing to provide additional required resources.

The other one has a school library because of the donations.

#### 4.2.14: Provincial budget allocation

Table 13: Total provincial budget allocated to your library for the past three years?

The summary of responses given below sub-regionally together with year when the allocations were made:

Sub-region	Respondents	Amount
<b>KwaMhlanga</b>		
2004/5	4	R2 000 & R8 780
2005/6	2	R2 000 & R8 780
2006/7	0	0
<b>Middelburg3/Witbank 3</b>		
2004/5	2	Amount not specified
2005/6	2	Amount not specified
2006/7	2	Amount not specified
<b>Moretele</b>		
2004/5	0	0
2005/6	0	0
2006/7	0	0
<b>Siyabuswa</b>		
2004/5	1	R1 575
2005/6	0	0
2006/7	0	0
<b>TOTAL</b>	13	

Out of 81 school libraries 13 (16%) indicated that for certain years budgets were allocated to the school libraries even though not all were able to provide the actual amounts. Since the summary budget sheet (which is done by the provincial department and does not accommodate the library entry in the main budget, it is assumed that the library and the amounts were added by the schools. The majority of 68 (84%) respondents did not answer the question.

#### 4.2.15: Changes in sources of funding

*Table 14: How sources of funding for your library changed over the past three years?*

On sources of funding for school libraries, responses to the question are categorised according to sub-regions as follows: no changes, no funding at all and no response.

Region	No changes	No funding at all	No response
KwaMhlanga	34	1	4
Moretele	4	1	10
Middelburg/Witbank 3	2	2	2
Siyabuswa	5	4	7
<b>Sub -totals</b>	<b>48 (63%)</b>	<b>8 (10%)</b>	<b>25 (22%)</b>

On the question of how the sources of funding for your library have changed over the past three years, 48 (63%) chose the response that there hasn't been a change. Another 8 (10%) indicated that their school libraries had never received any funding over the three-year period. **One** school added a comment that it was experiencing serious budget problems because teacher-librarians were not involved in provincial budgeting systems including the drawing up of the school's



paper budget. At the school level, it is possible to add school library as an additional item. Another 25 (22%) did not respond to the question.

#### 4.2.16: Library resources needed

Table 15: Which library resources do you currently need?

Responses are given sub-regionally:

Sub-region	Responses
<b>KwaMhlanga:</b>	<b>Sixteen</b> school libraries need library buildings, computers, furniture and books.
<b>Moretele:</b>	<b>Three</b> schools need computer and library buildings as well as relevant resources. <b>Six</b> schools need furniture, funds, dictionaries, computers and other relevant non-print materials.
<b>Middelburg/ Witbank 3:</b>	<b>Eight</b> schools need library buildings, shelves, roof and floor repairs, reference collection, furniture, fiction, posters and relevant non-print materials.
<b>Siyabuswa:</b>	<b>Ten</b> schools require library buildings (those without), shelves, computers, books and computers.

Out of 81 respondents 41 (51%) indicated that they needed all the resources. In summary, respondents showed that even if they ran library services, they were still not satisfied with the current resources and therefore required adequate budget to improve their services. The facilities differ from one school to another as one did have a library even though there were no information sources (see 4.2.13).

#### 4.2.17: Efforts to obtain library resources

Table 17: *Mention any efforts/activities that are in place to assist school library in making sure you obtain the resources mentioned under question 16.*

The summaries of responses are given sub-regionally below:

Sub region	Comment
<b><i>KwaMhlanga:</i></b>	<p><b>One</b> school encourages parents to buy reading materials for children in order to address the budget constraints.</p> <p><b>Six</b> schools indicated that they raise funds and ask for donations even from book publishers.</p> <p><b>One</b> school indicated that it is involved with Science Expo in order to build science material for the library.</p> <p><b>One</b> school asked for donations from the National Library.</p> <p><b>One</b> school has asked for donations from overseas schools.</p> <p><b>Thirty one</b> schools did not respond to the question.</p>
<b><i>Moretele:</i></b>	<p><b>One</b> school indicated that it has asked for donations from various companies.</p> <p><b>One</b> school indicated that it has no plans in place.</p> <p><b>One</b> school library indicated that it asks for donations and also raises funds.</p> <p><b>Twelve</b> schools did not respond to the question.</p>
<b><i>Middelburg/ Witbank 3:</i></b>	<p><b>One</b> school indicated that it has insufficient funds to make improvement plans.</p> <p><b>One</b> school mentioned that in case they get donated books, they squeeze them in the storeroom-library because there is not enough space for more materials.</p>

	<p><b>One</b> school indicated it has a media centre and still in the process of negotiating with the SGB to allocate funds to the library in order to buy required resources.</p> <p><b>Five</b> schools did not respond to the question.</p>
<b>Siyabuswa:</b>	<p><b>Four</b> schools mentioned that they need to ask for donations and increase school funds in order to buy library materials.</p> <p><b>Two</b> schools indicated that it has asked for donations for furniture.</p> <p><b>Eleven</b> schools did not respond to the question.</p>

In summary, some school libraries are trying to make a difference to provide a better library service for their schools despite the shortage of funds. The results of the study prove that schools do indeed improvise where physical structures are not available. For example, they turn classrooms into libraries, and use store-room libraries to keep information sources, and so on. It is interesting to note that there is one school which does not have enough space for more books. Biblionef provides shipping containers as libraries for the beneficiaries without storage space on their premises (Williams, 2006: 79).

### **4.3 DISCUSSION AND INTERPRETATION OF THE RESULTS**

It is important to clarify what the study's findings add up to and examine relationships, possible bias and error.

#### **4.3.1 Distribution and collection of questionnaire datelines**

This study used questionnaires to collect data. The questionnaires were to be completed within a certain reasonable period so that the respondents had enough time to answer the questions and return them to the sender immediately after completion. Out of 188 questionnaires distributed, it became clear during the telephonic follow ups that 30 schools, out of 107 which did not respond, failed

to do so because they did not have libraries even though they appeared on the Mpumalanga Department of Education list of schools with functional libraries. In all 81 questionnaires were returned.

#### **4.3.2 Name of schools**

The schools which responded to the questionnaire either have a physical library structure, classroom or mobile box/trolley or staffroom library. As much as these schools have different structures it is important to remember that the libraries are usually not open for the whole day. A functional library includes school libraries with computer centres in support of the curriculum and is available for use by teachers and learners.

#### **4.3.3 Number of functional school libraries per sub-region and circuits**

Schools in the Nkangala region are geographically distributed into sixteen circuits for easy management. The circuits are according to their location and proximity. The questionnaire was distributed to the schools in the rural regions as a number of studies still indicate that there are rural areas which are still do not have a budget as a result of financial constraints. Some of these schools were inherited from the former homeland and lack functional libraries.

The researcher used the school library list from Mpumalanga Department of Education in order to collect data from the 188 schools with functional libraries, yet on following up on the responses, 30 schools claimed not to have a library of any kind (i.e. box room collection/mobile trolleys, etc.)

Looking into the low response rate in this study and considering the comments made by the Equal Education (EE) (2010) that only 7% of South African public schools (i.e., former model-C schools) have functional libraries with full-time librarians rendering meaningful service may be regarded as true.

#### **4.3.4 Job position of the respondents**

Since it was important that accurate information is gathered from the schools, it became clear that teacher – librarians, principals or head of departments (HoDs) would be the best people to provide relevant on information budget allocation and library resources. Principals and HoDs could respond as they are accountable to the school management in general. The majority of functional libraries have teacher librarians and a lesser percentage, but it is not clear whether the principals or HODs are teacher- librarians. According to South Africa (1999:25) as cited in Hart and Zinn (2007:92) established that 30% of the teacher-librarians who participated in the study described themselves as principals, deputy principals and teaching heads of departments. The position of the respondents in no way indicates whether or not the teacher-librarians have a requisite qualification. It is possible that some could have completed a course in school librarianship as part of their diploma/degree education.

The UNESCO guidelines and South Africa (Republic)-Department of Education, (2005b) clearly indicates the importance of appointing one teacher librarian to be in charge of library service delivery at each school. Schools in the area under study show that they implement the minimum standards of the national policy on rendering school library service. Hell (2005: 43) cites an official from the University of Cape Town who states that “The school libraries which do exist are being run by part–time staff paid out of school funds or by teachers in their ‘free periods’.

#### **4.3.5 How long has the respondent (as teacher- librarian: including principals and HODs) been in his / her current position?**

The majority of teacher-librarians in the sub-regions have school library experience of more than 4 years, followed by fewer teacher-librarians who worked over a period of less than a year. With respondents who have been with the school less than a year there is a possibility that they were not in-charge of

the library before, or they were new in the school and did not have all the information, hence the failure to answer some questions.

Even the principal could have been new and unable to assist with information as at times the records are not kept. A lesser group of 15% has been responsible for the school for a period of 2 -3 years. All the respondents could have worked at a particular school for a long time, or come from another school.

#### **4.3.6 Is your library mobile/trolleys, separate room, storeroom, library computer, corner box or other / staffroom?**

There are different school library models that are recommended as most schools cannot afford to have well stocked libraries, hence the provision of mobile libraries/ trolleys in schools without physical structures to support teaching and learning. It is also important to note that no single/mobile box or trolley libraries can serve the whole school in one day, moving them from one classroom to the next.

At least one school in all the five regions has a school library with computers. It is not clear whether the school has access to the Internet, if so Internet is one source of information to support OBE and RNCS in addition to traditional school library materials.

All these efforts to have supplementary materials show that some schools do recognise the value of school libraries, but use very little financial resources to build their collections. Few schools have benefited from donated materials where the private sponsors through partnership with the government have donated computers. What is not clear is the number of computers, number of learners and who has access to them.

Kloppers-Lourens, Democratic Alliance spokeswoman, as cited by Kgosana (2010) said, "A library is critical for improving education. Not only does it give children access to the reading material and expose them to the joy of reading, but it often provides a space for study that is not available at home. Basic

Education acting director-general responded by clarifying that every school that is built from scratch or is refurbished would have a library included in its new structure. For the rest of the schools, he said, the department was exploring alternative options such as putting up mini-libraries with selected books inside classrooms.

The Mpumalanga - DoE realizing the poor state of its school libraries embarked on cooperation between school and public libraries. The process is still on going. What needs to be ensured is that the public or community library should be within a prescribed radius. Basic Education acting director-general further proposed that where a school had its own library, the department encouraged it to share the library with the schools in its vicinity that do not have any. In addition, he said, schools were also being encouraged to use community libraries and, where possible, computers were being installed.

#### **4.3.7 Do you have a budget policy at your school?**

The study has also revealed a non-existence of budget policies in many schools which participated in this study. The non-availability of budget policies in school libraries is an indication that no guidelines are followed. A policy ensures some consistency in the operations. It is essential for schools to develop fundraising and budgetary policies. The Mpumalanga school library policy became available in mid-2011 and expectations are that schools might come up with theirs.

#### **4.3.8 Which budget formula is your school/school library using?**

It was essential to establish if there was any budget formula being used by schools to allocate funds to the library. The majority of the schools do not use any budget formula. One school library uses incremental and another one use line-item budgeting methods. According to the literature reviewed, it is essential to follow a particular budget formula when budgeting, in order to achieve quality work (Anderson, Briggs & Burton, 2001:29; Roberts & Rowley, 2004:195).

#### **4.3.9 Who decides how much to allocate for your library and/or computer centre?**

In the previous question where the respondents had to indicate the budget formula, it was noted that the decisions in some schools were made by the SGB or SLM. In a study by Mestry (2006: 34) similar sentiments were shared by the respondents in this study who revealed that as teachers they were excluded from financial decisions because the principal and chairperson of the SGB did not discuss the budget with them. Another small group indicated that they relied on the provincial department for the budget. A study by Hart and Zinn (2007:93) also established that there is little information in the report on the resources of school library funds. They concluded that only a minority of schools allocates funds to library resources in their annual budgeting (2007:93). This situation could be similar to some of the schools in the Nkangala region.

#### **4.3.10 How is the budget decided upon? (i.e., how much goes into what?)**

Few schools base their budget decision on needs analysis. One school relies on the available budget. This could imply if the amount is small no library materials would be purchased. The majority of the respondents do not base their decision on anything because there is no budget available.

The study reveals that school libraries/ school libraries with computers in Nkangala region depend mainly on provincial office for the provisioning of resource centres' materials. From the responses, the SGBs are the ones responsible for allocation of funds as stipulated in the South African Schools Act (South Africa, 1996). However, as Le Roux (2003), as cited by Hart (2006: 92) points out, this did not help library development. The Act describes the role of the governing body as ensuring quality (Hart 2006: 92) but she further commented about the stumbling block being the reluctance of the school governing body to recognise the need for school libraries. To deal with the situation she recommends that the way to circumvent the obstacle is by purchasing materials



for schools from a centralised budget. Experience has shown that the mere purchase and delivery of materials to school is not enough. KZN, therefore, has set up processing centres where books are catalogued and processed and model collections are housed. Teachers visit the centres and are encouraged to select materials for their schools (Hart, 2006: 92).

#### **4.3.11 Changes in the funding percentage and practice for the past three years.**

The results of collected data show that some schools who responded to the questionnaire had an increase in their budget for the past 3 years even though they could not provide all the amounts in table 4.2.14. These schools realised an increase in their school fees as a result of donated funds by mining companies where schools are located, as an act of goodwill or ploughing back into communities. With less than 50% of respondents there has been no change in the budget over a period of three years and the majority of the respondents did not respond. The Department of Education (2007) indicates clearly that school libraries cannot survive only from school fees and therefore should seek extra assistance from the corporate world, through SGBs.

#### **4.3.12 Sources of funding for your school library and /or computer center?**

Results show that the majority of the school libraries identify the main source of funding as the provincial department of education. Very few (10%) indicated the regional office as a source of funding; maybe it is because paper budget comes straight from the head office, whereas payments are made by the regional office. Few mention donors and these are next to the mines. The Department of Education (2005) indicates that funding and maintenance of school libraries remains the responsibility of the provincial department and schools.

#### **4.3.13 Sources of funding for the specified items in your library.**

The study reveals that all school libraries in the rural area of Nkangala rely heavily on the provincial department as the main source of funding for building construction, maintenance, furniture and equipment, books, journals and other non-print materials. Since it is still not yet possible for the government to build school libraries on its own it is clear that additional funding from the private sector is needed. The researcher noted that Expo Science, the South Africa's National library and overseas donors have provided resources such as books to schools country wide.

Developed countries have, over the years, been donating books to developing countries in Africa. There are many reasons given against the donations. One is that the academic levels of donated books are largely unsuitable for the educational attainment of the pupils with language barriers being cited as the major reason for this. In addition to practical implications – the book donation approach in isolation is not sufficient.

According to Mills (1994:8) as cited in Anderson (2009:21) donor agencies tend not to set explicit targets, fails to evaluate their donations, and do not properly manage their aid. Books sent at a cost may simply sit there if they are not appropriate, making uninformed donor feel good while creating a burden for the recipient. Another comment acknowledges the donations as it says “Although some collections may not directly be relevant to the programmes of the [school] libraries in the recipient countries, they alleviate situations (Okite, 1993 cited by Anderson, 2009:9). In a case study Anderson conducted on book donations one comment made was “We need some of the books connecting to our subjects....Your syllabus and our syllabus, somehow they are different ...so if you can come with the books which are different... So if you can come with the books which are connected to our education here, so that we use them when we are furthering our education of the pupils” (Anderson, 2009: 21). However,

Anderson (2009:36) appreciates that Eurocentric books are considered relevant as they provide access to global information and can inform a more affluent way of life.

The South Africa (Republic) – National Department of Education (2005b) makes mention of the importance of multimedia resources in the library to enhance teaching and learning although on the other hand, it also mentions that the department or government does not have enough funds for school libraries as a result they need to fundraise. Johansson (2007:19) points out the controversy over funding of school libraries in South Africa since the government faces challenges of inadequate funding.

Hart as cited in the Equal Education Newsletter (2010:1) comments that “Return on Investment (ROI) studies show that money spent on libraries is well spent-in terms of academic results and literacy levels....a library just adds value to all aspects of a social life.”

#### **4.3.14 Total provincial budget allocated to your library for the past three years.**

In summary, few schools in rural areas are not able to pay for resources for a library even though the MDE budgets for school libraries have increased. The reason has to do with a lot of competing with other priorities in the education such as feeding schemes (Dubazana cited in EE 2011). The study reveals that only few school libraries receive budgets when principals reallocate the budget on the paper budget (which is initially prepared by the provincial department) as per school needs and priorities. Sadly, the schools paper budget provided by the province does not reflect the school library as an item and the literature on the issue established that having to shift funds is not an easy process in most cases. Most school libraries do not have policies or guidelines.

#### **4.3.15 Changes in funding for your library over the past three years?**

Responses to the question are categorised according to sub-regions and into no changes, no responses and no funding at all:

The majority of the respondents did not answer the question how funding for their library has changed over the past three years, a lesser number gave a response that there had not been a change. This could mean the amounts given were the same even though they did not provide them as asked. Another smaller percentage never received any funding over the three year period.

Only six school libraries in the area have library budgets that change every year, since schools do not have fixed annual library budgets. The amounts that the schools receive per annum are so insignificant and obviously will purchase fewer books than required since books are costly. When one considers the rapidly rising prices of books, one realizes that these amounts are minimal in comparison with what is needed to supply an optimum service. A question remains, 'How many books can one buy with less than R10 000?' During the symposium organized by National Council for Library and Information Services (NCLIS) and the Department of Arts and Culture, it was revealed that value added tax (VAT) is a relatively small proportion of the overall books. Major cost drivers are the cost of paper, currency fluctuations and the tendency of South African publishers to print small runs of expensive books, rather than print lower quality books aimed at mass market as they do in India or Nigeria for example (Departments of Arts and Culture, 2005).

#### **4.3.16 Total provincial budget allocated to your library for the past three years?**

From the responses it is not clear how much schools received. It would have been better for the researcher to have information about the money received by the school and how much of that was allocated to the school library. The provincial library so far has not allocated school libraries and this decision

depends on the schools. On the paper budget the schools can decide to allocate any amount to the school library which may be split according to the needs of each school.

The respondents could not provide the amounts but they indicated that the books they receive from the provincial office do not show any price(s), as such they do not know how much was allocated for the library resources.

#### **4.3.17 Which library resources do you currently need?**

In summary, all schools in the study require funds, library buildings and all other relevant resources to make them capable to render meaningful service. The Department of Education (2005b: 5) clearly indicates the value of a multimedia school library for effective support of teaching and learning. It states the importance of schools to purchase reference sources, fiction, non-fiction and non-print materials.

#### **4.3.18 Mention any efforts/activities that are in place to assist your school library in making sure you obtain the resources mentioned under question 17.**

The Department of Education (2005b) clarifies in the guidelines on budgeting for school libraries that the national government lacks enough funds to support school libraries, suggesting that schools need to fundraise or ask for donations in order to survive.

The study reveals that fewer schools ask for donations and fundraise in order to obtain the resources they require. One school indicated that it was involved with Science Expo and collects science materials for the library. One school gets its resources from the National Library of South Africa (NLSA), one other from publishers, and another from private companies. It is essential for the provincial department of education to encourage school libraries to fundraise through clear guidelines and policy formulation. Other schools indicated that they were still

negotiating with the provincial/regional department and SGB to get physical structures and all other resources required. This is an indication that schools in the area struggle with budget as well as physical structures.

#### **4.4 SUMMARY OF THE CHAPTER**

The study reveals that only few school libraries in the sample have budget policies. SGBs are the key to school library budgeting procedures and decisions. Unfortunately, there were no changes in budget allocation of the majority of schools in the sample. All public school libraries in the study, under Section 21, depend solely on the resources provided by the provincial department.

Many school libraries/computer-library centres require multimedia resources such as books, journals, computers, reference sources, etc.; those operating with mobile libraries require physical structures. It becomes clear that resources provided by the provincial department are not enough and schools need to fundraise and ask for donations in order to improve service delivery in the library sector.

In conclusion, the results of the study reveals a number of challenges related to budgetary constraints besetting rural school libraries in Nkangala. Some of those challenges are the establishment and implementation of proper budget and fundraising policies and procedures for better service delivery.

## CHAPTER FIVE

### SUMMARY, FINDINGS AND RECOMMENDATIONS

#### 5.1 INTRODUCTION

The purpose of this chapter is to provide the summary of chapters, conclusion and recommendations. A summary of chapters is presented below.

##### 5.1.1 Summary of the chapters

The summary of chapters is given below as follows:

**Chapter 1** set the research questions, aim, objectives of the study, the scope of the study, significance of the study and the background of the study. The problem statement was also outlined as the key aspect of the study.

**Chapter 2** covers literature review on budgeting with special emphasis on the school library sphere, the role of the school library, the importance of budgeting for school libraries, and who has to be involved in the budgeting process. Budget and fundraising policies are also addressed and how cooperation is important in schools with poor library resources.

**Chapter 3** outlines the research methodology which was employed to collect relevant data from teacher- librarians, principals and heads of department in relation to budgeting, budgeting policies and fundraising in rural Nkangala schools.

**Chapter 4** presents collected data. Data are summarized and interpreted sub-regionally according to the questionnaire as indicated in Appendix A.

**Chapter 5** outlines the summary, findings and recommendations on budgeting constraints in Nkangala according to collected data.

### **5.1.2 Restating the research questions**

- i) How do school libraries budgets in the chosen region measure up to the Transformation of LIS Charter?
- ii) How school libraries are funded?
- iii) What library facilities and resources do these schools have?
- iv) Do schools have policy for funding of their libraries?
- v) What does the policy say in terms of how much money/percentage of the school budget should be allocated to the school library?
- vi) What steps have these rural schools/school libraries put in place to fundraise?

### **5.1.3 Restating the objectives of the study**

The specific objectives of this study are:

- i) To establish the school library model of schools have.
- ii) To establish which Nkangala rural schools received budgets earmarked for school libraries?
- iii) To identify the origin of financial resources for Nkangala rural schools.
- iv) To describe budget formulae being used to allocate funds for the school library and who is involved in the budget allocation at the school level.
- v) To identify information resources the school would like to purchase if funds are made available.
- vi) To recommend cooperation between schools and the public libraries and clarify the benefits to be derived thereof.



## 5.2 FINDINGS

In response to the research questions, the study has established the following:

- i) In line with the Transformation of LIS Charter, school libraries surveyed had different school library models. However, the school libraries need budgets to purchase more resources.
- ii) Findings from the study revealed that school libraries surveyed have library facilities such as mobile boxes, trolleys and classroom collections, one deduces, however, from the budgets availed that the collections were not adequate and need to be developed. The teacher-librarians, principals and HoDs were responsible for the school libraries even though it's not on full time basis.
- iii) The study revealed that school libraries depended solely on the provincial department except for the two schools which benefitted from the donors. No school funds were available for school libraries.
- iv) There were no school library budget policies. The participants feel that budget policies are useless since there are no budgets for school libraries.
- v) Even though there were no budget policies for school libraries some teacher-librarians know about the 10% meant for LTSM. There were cases where the SGB decided on budget allocations or allocations were based on needs assessment.
- vi) There were no fundraising policies. The reasons given for not fundraising are:
  - Teachers indicated that did not know how to fundraise. Participants would like to be trained on how they are formulated.
  - The SGBs and parents are according to SASA expected to assist with the fundraising. The literature reviewed in Chapter 2 highlighted that

majority of SGBs in rural areas did not know how to fundraise or work out a budget.

- This alternative funding is not likely to succeed as majority of South African rural areas are characterised by high unemployment and poverty. This is explained under the literature review in Chapter two.

The following summarised findings are based on the objectives.

- i) Responses indicate that budgets earmarked for school libraries were not received and this is reflected in school libraries requesting for buildings, furniture, computers and book collections, to mention a few.
- ii) The funds for school libraries come from the provincial government, except for two schools which received donations from an unnamed source(s).
- iii) No budget formulae were used, but the SGBs allocated money when possible. Teacher-librarians were not involved in the budget allocation. SASA puts the responsibility of budget allocation on the principal and the SGB.
- iv) Most school libraries experienced budget constraints; respondents indicated that the majority of school libraries needed to have budgets. The library as an item was also not reflected in the paper budget.
- v) Mpumalanga has already embarked on cooperation between the schools and public libraries. What needs to happen was to make sure that Nkangala region join resource sharing efforts of whatever kind. The Transformation of LIS Charter encourages dual use of school community LIS.

As a result of no budgets some school libraries in Nkangala region were clearly not adhering to the LIS transformation charter and this is reflected in the following:

i) Poor facilities and resources.

- As a result the majority of school libraries having no budgets, their facilities are poor. This means that learners had no access to up-to-date collection of reading, learning and information resources as indicated in the Transformation of LIS Charter.

ii) Staffing (teacher- librarians) as a resource

- Some principals, heads of departments and teachers were still responsible for school libraries even though on part - time basis, as indicated in the DBE reports. The DBE promised in some of its correspondences that staffing will be addressed once there is a budget.

iii) Some teacher- librarians have revealed that they:

- were not involved in the allocation of the schools budget.
- lacked necessary financial knowledge. The literature showed that even the majority of SGBs who were responsible for allocation of funds failed to do so due to lack of financial knowledge.
- did not know about how the budget was allocated, yet they were expected to be part of the SLC and work together with the SGB.

Since schools were struggling financially, the possibilities of fundraising were encouraged. Another alternative for schools experiencing shortage of resources is for school libraries to use public libraries. The literature reviewed showed how the partnership benefited learners and teachers.

### 5.3 RECOMMENDATIONS

- i. On the issue of library infrastructure and resources school libraries should continue with box collections/mobile trolleys which are moved from one class to another on provision that the books are relevant to both learners and teachers. Undoubtedly, there is a need to buy more books if the number of learners increases. In addition, school libraries should avoid relying on obsolete or torn books.
- ii. What schools need are well stocked modern libraries with access to computers and the Internet. The DBE had better keep its promise to build schools with modern libraries.
- iii. The SGBs and teachers should be trained on fundraising. In addition, they should learn to solicit donations from private stakeholders to build school library with computers.
- iv. There should be more transparency and the SGBs, principals should work together in ensuring that school libraries are developed in support of the curriculum.
- v. The National Education Department needs to keep their promise to employ full-time teacher- librarians so that learners can have access to the resources when they need them. Some pressure groups feel this is a matter of urgency if the school libraries are taken as central to teaching, learning and curriculum development.
- vi. The provincial department needs to implement the Mpumalanga School Library Policy immediately. School should also formulate their budget and funding policies now that the provincial one is available. A monitoring committee also needs to be established to ensure that policies are implemented.

- vii. More active involvement of the school library advisors on issues such as budget and fundraising policies, donors and suitable library models for different schools.
- viii. It is best for rural school libraries with poor library resources, to share resources with other libraries in the same the district. School libraries with building can share the building with other schools in the same sub-region to form clusters.
- ix. In case of the schools cooperating with the public/community library, this would be ideal for schools not far from the public library. The school libraries with buildings can give some space to the public library. They should agree on who will be responsible for what in order to avoid conflicts that might occur.

#### **5.4 LIMITATIONS OF THE STUDY**

It is normal for most studies to have limitations. In this study, the limitations are related to the sample and its testing conditions.

##### **i) Sample**

Although the study collected valid results throughout the study, a number of respondents left some questions unanswered. This shows that perhaps the respondents did not understand the questions. The researcher should have personally visited some of the schools that did not respond to check if it is true that they do not have functional libraries. The aim of the visits would be to augment the questionnaires and to give better results.

##### **ii) Incorrect information**

Some schools which appeared on the list obtained from Mpumalanga Department of Education Physical Resources Section as having physical library structures did not have such facilities.

### **iii) Confusion over terminology**

Some excluded areas might be regarded as urban and some as rural, e.g., Machadodorp.

### **iv) Current library resources**

It would have been best to have asked about the current resources libraries have in order to establish if they are adhering to any ratio.

## **5.5 SUMMARY OF THE CHAPTER**

The results of the survey proves that rural school libraries in Nkangala region, Mpumalanga, still experience serious budget constraints due to reliance on inadequate provincial department budget which does not cover school libraries, this resulting in them not adhering to the recommendations in the Transformation of LIS Charter.

It is indicated in the first chapter that the focus of this study is on functional libraries but from collected data, it is clear that many school libraries in the rural part of the region are operational because they use mobile box/trolley libraries. Mobile box/trolley libraries have collections supplied by the provincial department and they have lending records and accession registers.

It is also a challenge for teacher-librarians to learn about fundraising, drawing of budget policies, developing budget formulas, etc. because the policies of the Department of Education clearly state that it does not have sufficient funds to give full support to school library services.

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## **APPENDICES**

### **APPENDIX A: Covering letter**

#### **EDUCATION DEPARTMENT**

#### **NKANGALA REGIONAL LIBRARY SURVEY-QUESTIONNAIRE**

**DEAR SIR/MADAM,**

- You are requested to furnish relevant information and your cooperation will be highly appreciated.
- Your name and whatever information you may provide will be treated confidentially.
- The research/study is valuable for developmental studies in school librarianship relations with the Regional/Lending Section in Nkangala region.
- Please fill in the questionnaire within three working days and submit it at the Circuit Office.
  - The researcher is:

Ms G.T. Nsingwane

Nkangala Regional Library and Information Services - (Lending Section)

## APPENDIX B: PRINCIPALS AND TEACHER- LIBRARIANS QUESTIONNAIRE

1. Date:

\_\_\_\_\_

2. Name of school:

\_\_\_\_\_

3. Name of circuit:

\_\_\_\_\_

4. Name of respondent:

\_\_\_\_\_

5. Position of respondent:

\_\_\_\_\_

6. Since which year has the respondent been in his / her current position?

(Y / Y / M / M / D / D)

\_\_\_\_\_

7. Your library is? (Please tick the most appropriate box).

7.1 A mobile box/trolley

7.2 A separate room

7.3 A storeroom-library

7.4 A school library with computers

7.5 A corner box

7.6 Other (Please specify)

\_\_\_\_\_

8. Do you have a library budget policy at your school? YES/NO

If **NO**, please explain.

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9. Which budget formula is your school/school library using?

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10. Who decides how much to allocate for your library / school library with computers? Please explain.

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11. How is the allocation decided upon? (i.e., how much goes into what?) Please explain

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12. Were there any changes in your funding policy and practice for the past three years? If so, explain.

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13. What are the sources of funding for your school library / computer-library centre?

13.1 Funded by the provincial government Yes / No

13.2 Funded by the school Yes / No

13.3 Funded by the regional office Yes / No

13.4 Other sources of funding (specify)

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14. Name the sources of funding for the specified items below in your library:

Item (specify)	Provincial	School	Other
-------------------	------------	--------	-------

14.1 Building construction	1	2	3
----------------------------	---	---	---

14.2 Building maintenance	1	2	3
---------------------------	---	---	---

14.3 Furniture & equipment	1	2	3
----------------------------	---	---	---

14.4 Books	1	2	3
------------	---	---	---

14.5 Journals & other printed matter	1	2	3
--------------------------------------	---	---	---

14.6 Audio & electronic	1	2	3
-------------------------	---	---	---

14.7 Other (specify) _____	1	2	3
----------------------------	---	---	---

15. What was the total provincial budget allocated to your library for the past three years?

15.1 2004 / 5 \_\_\_\_\_

15.2 2005 / 6 \_\_\_\_\_

15.3 2006 / 7 \_\_\_\_\_

16. How have the sources of funding for your library changed over the past three years?

17. Which library resources do you currently need?

18. Mention any efforts/activities that are in place to assist you in making sure you obtain the resources mentioned under question 17.



## **APPENDIX C: PAPER BUDGET**

### **GUIDELINE BUDGET ALLOCATION FOR 2008**

#### **1. LEGAL FRAMEWORK**

THIS GUIDELINE BUDGET IS ISSUED IN TERMS OF THE PROVISIONS OF THE NATIONAL NORMS AND STANDARDS FOR SCHOOL FUNDING: ACT 84 OF 1996

#### **2. SCHOOL DETAILS**

NKANGALA REGION, KWAGGA EAST CIRCUIT

..... SECONDARY SCHOOL

EMIS NUMBER: 800 002 111

LEARNERS: 437

QUINTILE: 3

#### **3. THINGS TO BEAR IN MIND**

- 3.1 Please note that the amounts indicated above have been allocated to your school in terms of the above Act.
- 3.2 All schools that qualified for less than R10 000.00, have been given a supplementary allocation.
- 3.3 Day-to-day maintenance has now been included in your allocation for specific use of light bulbs, window replacement, door handles, blocked drains, water leakages, sewerage, etc. (Only existing approved contractors/ service providers to be used until their contracts expire).
- 3.4 No fee subsidy only for schools that qualify.
- 3.5 The following cost items are handled centrally:

- Learning Support Material (LSM). Schools must NOT exceed the budgeted amount when ordering LSM
  - Transport-Learning Support Material
  - Purchasing of furniture
  - Rental of school buildings
  - Transport-pupils
  - Rental of labour savings devices
  - Capital structures
6. Institutions that will not order the full amount of LSM, or any other item, may apply in writing for the shifting of such funds to other allocations.
7. Audited financial statements and accompanying documentation have to be submitted by 30 April 2008 before payment of allocated funds into school banking accounts can be effected.

8. FINANCIAL DETAILS

Item allocated for 2008 are as follows:

Telephone accounts	R1 500
Office stationery	R5 939
Consumables	R5 114
Toiletries	R5 609
Municipal services	R21 117
Supplementary	R 0
Day-to-day maintenance	R5 012

No fee subsidy	R0
TOTAL (payments handled centrally by the department):	R93 698
<b>Grand Total:</b>	<b>R137 989</b>

**AUTHORISATIONS:**

**SUPERINTENDENT – GENERAL**

Department of Education

