INTERNATIONAL PARTNERSHIP, NATIONAL IMPACT: THE SOUTH AFRICAN LIBRARY LEADERSHIP PROJECT

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Abstract
This paper reviews the elements of a successful international partnership that led to the development, implementation, and evaluation of the South African Library Leadership Project (SALLP). This innovative project, funded by the Mellon Foundation, was managed jointly by the Library and Information Association of South Africa (LIASA) and the Mortenson Centre for International Library Programmes at the University of Illinois at Urbana-Champaign. The SALLP, begun in June 2001, will be completed by December 2004. The goals of the SALLP are to develop leadership qualities, to refine communication and advocacy skills, to highlight best practices and future trends in the management of library services, and to learn about change management and organization structures. Twenty-three South African librarians, senior and middle managers of academic and public libraries, have participated in this professional development programme, which took place both in South Africa and the United States. The strengths and weaknesses of the project and its outcomes are discussed. The paper also explores aspects of the joint management of an international professional development programme. This includes opportunities for developing partnerships, elements of a successful partnership, funding and budgeting strategies, and sustainability.

Introduction
The South African Library Leadership Project (SALLP) is an example of a successful international partnership. This paper aims to highlight the theoretical and experiential elements, criteria and competencies that resulted in this project. Much has been written about partnerships in general and library partnerships specifically. There is some confusion about the term 'partnership' and it is used interchangeably with related terms such as networking, collaborations and cooperation. For the purposes of this paper the following definition of 'partnership' is used: “a relationship in which people or organizations work together with equal status”. The following African proverb succinctly captures the essence of a great partnership:

If you want to go fast, go alone. If you want to go far, go together.

The unique elements of a successful partnership may vary from organization to organization. In 2001 Mattessich, Murray-Close, and Monsey studied and analyzed research on partnerships and identified 20 factors common to successful partnerships. In terms of a desirable environment key factors are:

• a history of collaboration or cooperation in the community,
• the collaborative group is seen as a legitimate community leader,
• a favorable political and social climate.

For the SALLP project, the second and the third of these factors were particularly important. The partners were recognized as being leaders in the field and the timing was right, both financially and politically.

In terms of membership characteristics there has to be mutual respect, understanding and trust along with an appropriate cross-section of members. These members also needed to see collaboration as in their self-interest and be able to compromise. According to this study, the concept of mutual respect, understanding and trust emerged as the most mentioned success factor. It was one of the most critical elements in the SALLP partnership.

With the process and structure members share a stake in both. There need to be multiple layers of participation where features of flexibility and adaptability were present. Clear roles and policy guidelines are necessary with an appropriate pace of development. ‘Ownership of the project’ is a recurring theme in SALLP and was crucial to the success of the project.

In terms of communication it was important to have open and frequent communication as well as informal relationships and communications links. Communication probably emerged as the most critical, delicate, and complex of the key elements. Talking about money or management issues is never easy and in a cross cultural context can be very difficult. Informal communication channels were critical to overcoming potential areas of conflict.

Regarding purpose the vision should be shared with concrete, attainable goals and objectives and a unique purpose. It was, at times, difficult to remain focused on the shared vision of the project. A strong evaluative component allowed the administrators of the project to reexamine the shared vision and to refine the goals as the project progressed. Necessary resources include sufficient funds, staff, materials and time. Skilled leadership should be present, and with the generous support of the Mellon Foundation and the strong administration team in each partner, the project moved forward successfully. Wildridge et al in a 2004 review article on research into partnerships mention an interesting staff trait that helps build successful partnerships:

A further key staff attribute is seen to be skills in working across professional, organizational, or other boundaries... The surmounting of boundary lines is a success factor, while failure to do so can quickly create a barrier to success. 3

Although boundaries serve as guidelines in the initial stages, the partnership process is constantly evolving. The ability to negotiate and revisit boundaries requires skillful handling and mutual flexibility and agreement. Mutual respect and a willingness to learn can also be added to the above success factors. Mutual respect is required for cultural differences and an understanding of local conditions and needs. Every organization has its own culture that is built over time, based on its mission, its practices, its people, its governing values, its traditions, and its institutional history. In any partnership situation, it is important to acknowledge and understand these different organizational cultures, to respect them, and to find ways that these realities can contribute to strengthening the mutual endeavour. A willingness to learn how to operate in a different environment is key. This includes the acknowledgement of local expertise and consultation with a wide range of individuals and/or groups who live in and intimately know local conditions. The most successful partnerships recognize and value their differences and find ways to integrate them into a workable overarching partnership culture.

As more countries explore opportunities for partnerships, potential partners should make informed decisions based on fact and not assumptions. For cross-cultural partnership development, initiatives may include site visits, interviews, sector consultations, etc. Political
correctness necessitates an awareness of cultural norms, gender and race sensitivity and socio-political understanding.

**Breaking down the obstacles**

Major obstacles to a constructive and successful partnership include;

- conflict over key interests;
- a lack of clear purpose;
- unrealistic goals or deadlines; key interests and stakeholders, including decision makers, who are not included or refuse to participate;
- unequal benefits for the partners;
- some participants having more power than others;
- financial and time commitments that outweigh potential benefits;
- partnership members who are uncomfortable with the commitments required;
- constitutional issues or legal precedents which constrain the partnership.

The ability to identify areas of potential conflict at the outset of a project and the sensitive handling of obstacles when and if these do arise, are essential skills that help to prevent the dissolution of a potentially effective partnership.

**Celebrating success**

Successful partnerships look for every opportunity to celebrate individual project successes or key benchmarks in the evolution of the partnership. Such celebrations allow the partners to recognize good work being done that re-enforces the goals of the partnership; to gain some outside recognition of the partnership; and/or to demonstrate possibilities for the partnership to grow. Recognizing and celebrating accomplishments helps motivate participants to meet new challenges. It is a lost opportunity when it does not occur. If one’s goal is to build greater awareness of the partnership, then the partners need to take every opportunity to legitimately celebrate each other’s success. The ethos of this partnership extended beyond the SALLP and achievements such as the awarding of the bid to LIASA to host the 2007 IFLA/WLIC and the awarding of various grants to the Mortenson Centre were celebrated by each unreservedly. In this paper the success factors will emerge as the foundation of this particular project. Partnerships develop over time and the SALLP partnership continues to grow and evolve as needs and focus change. Looking back over the past four years, there are elements that emerge as significant in the building of this partnership.

**The South African Library Leadership Project (SALLP)**

This innovative project, funded by the Andrew W Mellon Foundation, was managed jointly by the Library and Information Association of South Africa (LIASA) and the Mortenson Centre for International Library Programmes at the University of Illinois, Urbana-Champaign. It ran from January 1, 2001 to June 30, 2004. The success of the initial project and the need for more training of this calibre resulted in a further grant being awarded by the Mellon Foundation. This final phase of the project, which terminated on December 30, 2004, focused on the development of librarians who are actively involved within the leadership structures of LIASA and who are committed to the development of the profession and the Library Association.

There were two main goals. Goal 1 was concerned with implementing a leadership programme for promising future managers from academic and public libraries. Twenty three librarians representing senior and middle managers of public and academic library services were selected through an open, merit process for participation in a 6-8 week leadership
training programme at the Mortenson Centre. They now constitute a national resource pool of LIS professionals who are making a noticeable impact upon LIASA and the profession.

Goal 2 was to locate a continuing education facility within LIASA. In 2002 the University of Cape Town conducted a preliminary survey of training needs of local library and information services (LIS) workers for LIASA and identified four focus areas, namely, Personal Development; Professional & Support Skills Development; ICT, and Management & Leadership Development. LIASA then identified Continuing Education and Professional Development (CEPD) as one of its strategic objectives within its business plan. The then Project Director and SALLP Co-ordinator worked on a framework with local experts in this regard. Subsequently, the Project Coordinator, in consultation with the staff of the Mortenson Centre, developed a proposal which was submitted to the Carnegie Corporation of New York in 2003 for the establishment of the Centre for Information Career Development (CICD).

The partners

LIASA and the Mortenson Centre worked closely together in the development and implementation of this project. These two very different bodies came together with shared goals to work on the SALLP project and were assisted by the generous financial support of the Mellon Foundation. The Andrew W. Mellon Foundation (www.mellon.org) is a not-for-profit organization located in New York and makes grants in higher education, museums and art conservation, performing arts, conservation and the environment, and public affairs. The Foundation has been active in several countries including Central America and South Africa.

LIASA (www.liasa.org.za) was established in 1997 to unite and represent all the institutions and persons engaged in library and information services in South Africa. Its mission advocates and supports the provision of efficient, user-oriented and excellent library and information services that aspire to equitable access to information for all communities (literate and illiterate) in South Africa. LIASA has established 10 branches in the 9 provinces as well as nine specialist interest groups that meet both professional and working needs of the members. LIASA is inclusive of all types of libraries, represents all regions and is able to reach librarians in all parts of South Africa through its extensive infrastructure. It presently has 2027 members nationally and has the potential to grow to more than 5000 over the next three years. Income gleaned from individual, institutional and international members is utilized for the development of the branches and interest groups.

LIASA is now recognized as a not-for-profit professional organization and has, since its inception, played a major role in the LIS sector in South Africa. This includes advocacy and lobbying of government at local, provincial and national levels for improved library and information services to all communities in this country and representation on the National Council for Library and Information Services (NCLIS), with authoritative input on library policy and legislation. LIASA is developing its profile nationally and internationally and the awarding of the opportunity to host the 2007 IFLA/WLIC in South Africa affirms its representative role in the LIS profession in South Africa.

The Mortenson Centre for International Library Programmes (www.library.uiuc.edu/mortenson) was established in 1991 at the University of Illinois Library with the generous gift of Walter Mortenson, a University of Illinois graduate. The goal of the Centre, as Walter Mortenson expressed it, is to “promote international education, understanding and peace”. This unique Centre provides professional development programmes for librarians outside the United States. Since 1991 more than 600 librarians from 85 countries have participated in Centre programmes. By the mid-nineties, the Mortenson Centre staff realized that, in order to provide high-quality, appropriate professional development training programmes, the Centre needed to work closely with library organizations outside the United States. Partner
organizations worked with Mortenson Centre staff to develop programmes geared to meet the needs of librarians within their country or region. It now has partners in Russia, Colombia, Costa Rica, Haiti, Georgia, and Japan.

The Centre has a small, dynamic, and creative staff. While most of the professional development programmes take place at the Centre in the United States, the staff also travel to libraries around the world to discuss possibilities for future projects. The Centre has an excellent fundraising record and has worked to raise funds for its projects with foundations such as the Andrew Mellon Foundation, the Carnegie Corporation, Open Society Institute, and the MacArthur Foundation.

Five stages of partnership

Over the four years of the project, five distinct stages have emerged. Stage 1 was primarily about developing the trust and being exploratory and fluid. Since 1996 the Mortenson Centre had, with funding from the Mellon Foundation, been working on establishing a centre for continuing education in Costa Rica. Several librarians from Central America had participated in this programme and the Mellon Foundation was pleased with the outcomes of the grant. The grant concluded in 1999 and the Mortenson Centre contacted the Mellon Foundation to determine their interest in funding this type of project in another country. The Mellon Foundation indicated that they were currently working in South Africa and would be willing, if the South African library community was interested, to consider another grant. The Foundation generously provided a small planning grant to the Mortenson Centre team for an exploratory visit. They also suggested that we should work closely with the current Mellon grantee, GAELIC, an academic library consortium in the Gauteng province. The GAELIC administrators were willing to help and set up an intensive set of one-week meetings for the Mortenson Centre team. Sixteen libraries in the Gauteng province were visited and presentations were made at each site. The goal was to provide information about the Mortenson Centre programme, to explain the possibility of a Mellon Foundation grant, and to gauge the interest of the library community in working with the Mortenson Centre.

While the presentations were quite useful in sharing information about the Mortenson Centre, the ensuing discussions were free-ranging and did not leave a strong sense of a united way forward. However, the week concluded with several intensive meetings with a group of librarians chosen for their leadership in the field. They represented the academic consortium GAELIC, LIASA, the public and school library sectors, NGOs, and the British Council. These discussions were fruitful and challenging at the same time, revolving around three main issues - trust, shared vision and establishing co-operation. Trust issues encompassed establishing reputations, understanding agendas and identifying management processes. Vision was about jointly establishing whether there was a need for a continuing education project for the South African library community along with the project’s format and its important outcomes. Pragmatic issues like necessary resources, realistic expectations, project audience and the question of which library entity in South Africa would be the best partner for this project, drove the discussion on co-operation.

When the discussions ended the group recommended that the project proceed since it would be a good fit with Mortenson Centre expertise and the ability to meet the needs of the South African library community. The proposal was to be written jointly with the Mortenson Centre and a South African group assigned to work on the initial stages of the project. The project would focus on building nationally leadership skills for academic and public librarians. If the proposal was funded, the logical South African partner would be LIASA and a project coordinator would be hired and located within LIASA. A second goal of the project was to build a continuing education entity in LIASA.
Defining the project occurred in Stage 2. It was agreed that the Mortenson Centre staff would draft the first version of the proposal and send it to the South African team for review and changes. This stage of writing and revising the proposal lasted several months. Communication between partners was frequent and interesting as each partner would be left to ponder changes made in the proposal by the other. This stage was marked by two important principles. It was agreed there was a need to understand the political, cultural and administrative context of each partner. Alongside this was the recognition of the importance of developing shared ownership of the project.

At the end of Stage 2 emerged what proved to be a winning proposal. Most important, however, was the establishment of a common project of which both partners took ownership. Also during this stage organizational cultures begin to manifest themselves. The South Africans were most comfortable with a more formal governing structure for the project, whilst the Mortenson Centre did not feel a need to create an outside governing structure. The Mortenson Centre, using the University of Illinois grants and contracts system, had a much more bureaucratic and lengthy process for the submission of a proposal. These are just a couple of examples of some of the issues raised and the types of discussion needed to understand each other’s context.

The project now entitled the South African Leadership Project (SALLP) began to take shape as important issues were debated and decided. The principal investigator on the project was the Mortenson Centre. This was because it had developed a good relationship with the funding agency, the Mellon Foundation. Also at that time (2000), the US dollar was much stronger than the South African Rand and, as a three-year project was envisaged, it made economic sense to keep the funds in dollars until they were needed in South Africa.

The first year of the three year project was the planning year and would allow us to launch the project and hire a SALLP project coordinator, set up the leadership programme, select the candidates, and generally work through various administrative issues. During the second and third years a group of South African librarians, selected by a panel in South Africa, would attend the Leadership programme. The programme itself consisted of three parts: a general orientation in South Africa, a six-eight week leadership institute in the United States, and follow-up training upon the return home. Agreement was reached on the amount of resources needed for the project and how the funds would be divided if they were awarded. The grant was awarded in December 2000.

Stage 3 revolved around managing the project and making it direct and focused. The first year of the implementation of SALLP was a crucial one as it set the tone and standard of operation. The timelines and draft project schedule was designed. The project co-ordinator was hired in June 2001 and the clock began ticking! Priority was given to open, frequent, and direct communication (and disagreement). South Africans are very conscious of representation and the consultative process. Aside from LIASA, the project governance structures were representative of the national, public and academic libraries, library schools and consortia. The presence of the sector leadership and of the partnering organizations clearly defined the purpose of the partnership and how the partners will measure and define success. As this was also the first major CEPD project, the general feeling was that it had to be done correctly. LIASA was the custodian of the project and accountable to the sector. With hindsight this has proven to be very effective as it garnered support from the sectors who would be beneficiaries of this project.

Although the formality of meetings and decision making was at first disconcerting to our American counterparts, it also served to broaden their understanding of how South Africans think and function. This awareness was then carried through in their handling of the participants during the training programme in the US. Whilst the identification of the goals
was led by the Mortenson Centre, the refining of the objectives and selection process was very much South African. The communication within this partnership was based on utilizing the strengths, experience and expertise of each partner in determining the most cost-effective approach and deciding who was best suited to accomplish specific tasks. The open lines of communication were also characterized by a flexible approach to the way in which needs and responsibilities were matched. The Mortenson Centre willingly shared their considerable programme experience and field of knowledge in determining the content of the training programme in the States, whilst fully respecting South African goals and interests. This was made possible by the ongoing dialogue and open communication which ranged from initial formality and politeness to current levels of comfort and spontaneity.

It was also important at this Stage 3 to find a way around the barriers. The management of a project such as this, involving two active partners on two different continents, will obviously throw up many barriers, not only between partners but also between partners and participants. The geographical distance, language, 'developed vs. developing' issues, resources, management styles, professional mindset and attitude, are some of the barriers that come to mind. Although libraries in South Africa have a more than 150-year history and, in comparison to many countries, a fairly sophisticated infrastructure which includes telecommunications, computer literacy, access to training facilities, awareness of current trends, and affiliations to international LIS organizations, this is not the universally prevalent situation. There are economically challenged areas that function with minimum resources and a strong sense of incapacitation exists amongst many LIS workers. The need to develop libraries and redefine the role of the library politically and socially is a challenge that continues to confront the profession. In the face of management and service delivery challenges, heads of library services recognise the importance for the development of future library leaders and further skills training of staff. Successful partnerships acknowledge and address these realities and take satisfaction in resolving them. This awareness informed the planning of the project. Addressing and resolving barriers at the outset helped in fostering a mutual environment of respect, integrity and co-ownership. At all times a strong professional attitude, trust and empathy permeated our relationship and became the foundation for all interaction. This was evident to all, and served to overcome challenges and/or perceived adversities. Rather than sticking to the formal rules as such, creative thinking and a practical 'hands-on' training programme was designed. Site visits, professional exchange, group discussions, individual meetings, a variety of teaching formats, mentoring and social downtime all contributed to a dynamic programme and elicited both tangible and intangible results from both participants and partners. Fortunately the synchronicity in thought and common purpose was recognised very early in the project and this prevented barriers from becoming entrenched.

This stage also included the importance of developing mutual respect and appreciation between the partners. Partnership work requires perseverance and ‘follow through’ by each participating organization and individual. It requires a shared commitment to each other’s success. Progress depends on each person in the partnership honoring commitments and following up words with deeds. Successful partnerships address the realities of delays and non-delivery by putting in place reliable accountability measures and regular communication processes to ensure commitments and actions.

This international partnership resulted in an extremely interesting way of organising, planning and implementing the logistics of the project. An early realization that we were committed to high standards and professionalism, resulted in a mutually respectful environment. The South African approach was fully accepted by the Mortenson Centre and their participation was wholehearted. The US programme was designed in consultation with
the South African partners and arranged in a manner that was mutually acceptable. As financial matters can put a strain on any partnership, stringent budgets, fiscal management, and an understanding of financial reporting mechanisms were imperative. Funder confidence subsequently resulted in an additional grant being awarded for the SALLP. Overall, this unique donor funded project management process was synchronized with single minded focus. The SALLP may therefore be described as a project that was designed using United States [American] expertise, experience and processes to achieve uniquely identified South African goals and objectives.

Stage 4 was concerned with navigating with the group. Managing a group of people representing a wide range of sectors, backgrounds, experience, expertise and professional understanding, differing needs and priorities, for 6-8 weeks in a new environment is indeed a challenge. Our priority was to facilitate the transition from a group to a team, ensuring collaboration whilst in the US and sustainability upon return to South Africa, and the training programme was therefore designed to include flexibility to meet the needs of individuals. Coincidentally, each of the three groups that participated in the SALLP had unique experiences as the programme was refined each year. The absence of repetition and the challenge of new ideas and opportunities affirmed the life changing experiences of each participant.

A national pool of professionals committed to professional leadership and association development was one of the outcomes envisaged, and the realization of Goal 1 became apparent in 2004. In his analysis of the Project in 2003, an independent evaluator expressed the opinion that individuals should be prompted to take up the challenge of greater involvement within the Association in the future. The year 2004 was an election year for office bearers in LIASA and the impact of SALLP participation was felt at all levels. Sixteen of the twenty three SALLP participants were nominated and elected as office bearers on LIASA structures for the 2004 –2006 term. LIASA positions into which SALLP participants were elected range from the office of national president and three other national office bearers through to branch officers and members of the Representative Council to coordinators and convenors of interest groups.

In addition, national and regional professional awards and honours were made to, and achieved by a number of SALLP participants. These include awards in 2002 and 2004 of the LIASA-SabinetOnline Academic Librarian of the Year; a 2003 provincial Departmental Employee of the Year award; and a 2004 provincial Premier’s Award for Excellence. Recognition of professional achievement has resulted in appointments to national bodies such as the Council for Higher Education Librarians in South Africa (CHELSA) and the NCLIS. For some, job promotions, new opportunities and further management development have occurred within their work environments. Most SALLP participants are now emerging as role models and serving as mentors to several young professionals.

Focusing on the future, being creative and reflective occurred in Stage 5. By the end of the lifespan of the SALLP on 31 December 2004, the original professional partnership had evolved into a relationship with considerable impact that is exploring opportunities for future collaborations. The term 'impact' describes a partnership's capacity to deliver tangible results and the creation of value and benefit for all partners. 'Common purpose' was identified as the core principle of a successful partnership. It is an acknowledgement that cooperation may be the best strategy for getting things done. People who share common interests and goodwill spend less time and energy in conflict and more time and energy tackling issues of common concern.
The immediate future

A partnership ultimately gains its stature and reputation based on the quality of the work it accomplishes. The most successful partnerships understand the importance of doing everything well. An early reputation for excellence and the ability to sustain that reputation are important factors in how others view a partnership and what doors will be opened as a result. Potential funders and others want to be associated with significant work and a reputation for excellence. A single successful partnership can become the springboard for further collaborative initiatives. The Mellon Foundation extended and awarded an additional grant for the SALLP as their confidence was reinforced by the perceived ability of the partnership to realize its goals within agreed timelines and the budget allocated. In February 2004, the Carnegie Corporation of New York awarded a 3-year grant of $499,500.00 to LIASA for a continuing education project. This grant was made on the basis of the success of the SALLP, the effective and efficient management of the Project and the strong professional partnership that has developed between LIASA and the Mortenson Centre. The goals of this new project are:

- to establish a database of accredited training programmes for the LIS sector,
- to build the capacity of the LIASA Interest Groups,
- leadership training at the Mortenson Centre for 2004 Carnegie grantees.

It is envisaged that this will be a centralized initiative to make training opportunities available to all South African LIS workers irrespective of the levels of initial training. Careful consideration will be given to the quality of training and accreditation of service providers and course content as required by the South African Qualifications Authority (SAQA), and to function within the ambit of the national Skills Development Act. The SALLP Co-ordinator has been appointed the Programme Co-ordinator of this new CEPD Project

Conclusion

Successful international partnerships have the potential to become long term relationships. The professionalism between the working partners is underscored by the synergy of common purpose, mutual trust and respect, and a sense of ownership. The partnership between LIASA and the Mortenson Centre has transcended the barriers of formality to embrace collegial networking and lasting friendships. Together we have indeed travelled far.

References

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