BHL Africa Organizational and Planning Meeting

14–15 June 2012, Kirstenbosch

After the successful meeting as part of the BHL Life and Literature Conference in Chicago (November 2011), a follow-up meeting was held in Kirstenbosch from 14–15 June 2012. This two-day meeting formed part of the SANBI Biodiversity Information Management Forum. Regional representatives from a range of African biodiversity-related institutions, as well as six key BHL staff members, representing administrative and technical aspects of the BHL project, came together for the BHL Africa Organizational and Planning Meeting. Key goals and outcomes of the meeting was to work together to establish a project plan for coordinated biodiversity literature digitization, and to lay the groundwork for African participants to create their own BHL Africa with discussions of the global frameworks that other regions (Brazil, Europe, Australia and China) have used.

1. Introduction to BHL,
   by Martin Kalfatovic, Project Director of BHL; Nancy Gwinn, Chair of BHL Executive Committee and Grace Costantino, Program Manager, BHL.

   Earliest BHL start traced back to 2003 with Encyclopedia of Life project. BHL thus became early partner with EOL to provide digitized literature to the project. BHL started with 10 members in 2005/6. Currently 14 institutes forms BHL and the Library of Congress will officially join as 15th member this year. BHL has also grown globally and now have nodes in every continent in the world except Antarctica.

2. BHL Organization (in America)

   Executive Committee:
   Makes day-to-day decisions about BHL.
   • Chair: Nancy Gwinn (, SIL),
   • Vice-Chair: Connie Rinaldo (Harvard-MCZ),
   • Secretary: (Susan Fraser, NYBG)
   • Project Director: Martin Kalfatovic, (SIL)
   • Program Manager: Grace Costantino, (SIL)
   • Technical Director: Chris Freeland, (MOBOT)

   Steering Committee:
   This was created to make BHL more sustainable. 9 Members pay annual $10,000 fee to be part of the Steering Committee, which allows members to participate in larger decisions for BHL.

   Institutional Council:
   Representatives from BHL partner libraries (14 members) includes the head of the libraries of each member institution.

   Pan-BHL Staff:
   • Global Coordinator (William Ulate);
   • Collections Coordinator (Bianca Crowley);
* Data Analyst (Trish Rose-Sandler)

**Funding:**
BHL was started with mostly private Grants. SI received US Federal Government allocation (annual appropriation). Membership Dues from Steering Committee are used for digitization. Institutional Support (member institutions contribute staff time to project)

**Accomplishments:**
Website (evolved since 2006. Now almost 39 million pages, 105,000 items, 55,000 titles)

**Flickr:**
showing images from BHL

**iTunes U:**
Agreement with iTunes U, creating collections in iTunes U about specific BHL content for users to download

**Meetings:**
Talk to partners regularly to coordinate efforts. In November, 2011, Life and Literature conference targeted what BHL would do to go forward and identified their activities for the next five years. BHL is also attending various professional meetings throughout US.

**Statistics:**
Weekends show dips in visits, so most users are most likely using BHL during workweek. It’s a research, resource tool used in research community.

**Technical Developments:**
Most scanning facilities are through Internet Archive (IA).

**Internet Archive:**
Scanning partner from the beginning of the project. They are a Not-for-profit institution based in San Francisco. They provide free storage for your content. Scanned content is put in IA at no cost. They create derivative files which are then pulled back into BHL.

**Macaw:**
This is a Scanning Workflow and Ingest Management tool. Allows BHL to use other non-IA scanning facilities and then push this content into IA so it can be ingested into BHL. It also works for already-digitized content.

**Workflow Tools:**
- Scan List (for journal publications; helps avoid duplication of journal scanning);
- Monographic De-Duper (Helps avoid duplication of scanning monographs);
- Wonderfetch (Sends bibliographic (MARC), volume information, and intellectual property information to IA for digitization; does so through Z39.50 protocol fetching)

**Social Media:**
Active in social media - Twitter, Facebook, blog, Pinterest, Flickr; Newsletter; Wiki’s, Quarterly Reports
3. **Presentations from Participants:**

- Sally Schramm: Librarian at South African Institute for Aquatic Biodiversity
- Mary Gikungu: National Museum of Kenya. Senior research scientist
- Susan Veldsman: Director of Scholarly Publication, Academy of Science of South Africa
- Hamish Robertson: Iziko Museums. Director of natural history collections
- Alex Asase: University of Ghana
- Geoffrey Mwachala: Director for research and collections, National Museum of Kenya
- Mary Waruguru Mwangi: Lake Victoria Basin Community, Head of regional center
- Jackson Muirirwe: Information Technology Officer, Lake Victoria Basin Community
- Grace Msffe: Librarian, Sokoine University of Agriculture
- Eva Wamala: Librarian, NEMA
- Deborah Kasule: Uganda National Council for Science and Technology
- Patience Agabirwe: Library Assistant, Kyambogo University, Uganda
- Peace Nagawa: EPRC, Knowledge Management Specialist
- Esther Obachi: Librarian University of Nairobi,
- Gracian Chimwaza, Executive Director, ITOCA (Information Training and Outreach Centre for Africa), South Africa
- Baba Ainina, Head of IT, Ecole Normale Superieure de Nouakchott (Mauritania), responsible for informatics. GBIF node in Mauritania
- Lawrence Monda, ITC Manager, National Museums of Kenya
- Margaret Koopman, Librarian, African Ornithology Library, UCT
- Ria Groenewald, Digitization Coordinator, University of Pretoria
- Anne-Lise Fourie, Assistant Director, SANBI Libraries, Mary Gunn Library

4. **Summary and Report back on questions; Project Director: Martin Kalfatovic,**

The eventual goal of BHL is to provide article-level access to all content. Content from Africa is much more expansive than users from Africa. We want to encourage more users from Africa to BHL. Bianca Crowley works with rights holders to negotiate permissions to scan.

All hosting is done on IA servers and BHL have servers in NHM, MOBOT and MBL-WHOI for full archives and partial archives at Biblioteca Alexandria, Victoria Museum and Chinese Academy of Science. There is also a full copy of metadata at Hague. From botanical side, accessing content is much more citation based. At MOBOT, we have Tropicos, which has more than 1 million plant names with citations.

There is also a journal resolver in BHL. You can search by citation and it will come back with likely hits for your citation within BHL.

Institutes should also consider putting up their own repository on their web or library page where they can download the content scanned and digitize. Many institutions can contribute their own publications (and rights to scan in-copyright materials. Some of these publications already digitized and could just be ingested). Open Access is critical.

BHL-Africa should put together a list of content we want to make sure is incorporated into
BHL and then coordinate to make sure all of that content is digitized and made available. BHL takes note of the desire to incorporate article-level access to materials from the beginning. We are working with JSTOR to get metadata for publicly available content. We’ve digitized in-copyright material. The founder of Google Scholar contacted us recently and wants to work with us to improve access to BHL content in Google Scholar.

There is a need for a central repository to collect content contributed by each partner. Connectivity may be an issue in some areas of Africa. Maybe we should explore an off-line BHL-Africa option such as BHL in a Book. Institutions need to know how to deal with copyright for digitization according to their own laws and regulations.

Standard metadata formats are important. Bibliographic level of metadata comes from the contributing library, preferably MARC format from library catalog. Item level metadata: pull from catalog as well, or apply that separately. Third level is page level of information – cover, toc, page numbers, etc…. that’s applied in a few different ways: applied at point of scanning, also can be edited further (Pagination), third way is using Macaw software – ingest page images and paginate then, generate an XML file. Egypt is looking into Arabic language content and their unique concerns and problems this has.

5. Global BHL Environment – William Ulate, Global BHL Coordinator (ppt posted) see attached document

6. Global BHL By-Laws – Nancy Gwinn, BHL Chair and Global BHL Secretary

Important principle: don’t have any misunderstanding among those who are planning project in regards to expectations. Best way of assuring you will have everything on the table, is to create documentation that explains everything.

Key Values: working with taxonomic community and rights holders, open access, collaboration, interoperability, transparency.

MOU: this means nodes have laid groundwork for principles and ways of operation, values of partnership, requirements and expectations. MOU is a 3-year document and should be revised if necessary after review.

BHL does not have legal standing. It is not incorporated as a legal entity. Funding comes into one or another institutions and the group has to trust that the money is for the entire partnership.

Membership is institutional and there are different levels of membership. The Steering Committee is to govern with specified requirements. Institutional Council is the next level of membership BHL Secretariat and is responsible for day to day operational management of BHL. By-law’s are down to who is going to do what and how it is going to work.

gBHL is more of a coordinating committee, not a prescriptive group that tells the nodes what to do. It sets forth a set of principles that each node thus far has agreed to. Each node is self-funded, but we operate transparently within your own legal framework.

There are many ways to communicate such as email, Skype, Google documents and the BHL-Africa wiki. One member of group is appointed the administrator and has the
responsibility of adding everyone else. Anne-Lise will be the administrator (with help from Margaret).

So in conclusion we would say that in Africa we may never need fees. None of the other nodes have fees. We should start with institutional support and people. We have to start small, get the project running and sustainable. We can then go out and invite other partners in Africa to join BHL-Africa.

So the question for tomorrow is:
What do we want? What is our long-term objective as a group? Even short-term, what do we want?

**Concept Document on Governance**  (outcome of day 2)

**Introduction to BHL (globally)**
The Biodiversity Heritage Library (BHL) is a consortium of 14 natural history and botanical libraries that collaborate to digitize past and present biodiversity literature, all of which is made freely available online at [www.biodiversitylibrary.org](http://www.biodiversitylibrary.org). BHL contains over 38.7 million pages of digitized literature (representing over 55,000 titles and 105,000 volumes), which can be freely downloaded as PDFs or high resolution images. BHL is a global initiative, with project nodes in Europe, China, Brazil, Australia, and Egypt. BHL-Africa supports conventions such as the Convention on Biological Diversity. BHL-Africa partners with the Internet Archive, which provides free storage and access to all BHL digitized materials.

**Mission Statement**
BHL-Africa is a consortium of natural history, botanical, research and other biodiversity-related organizations that aim to improve access to biodiversity literature through digitization and open access principles as part of a global biodiversity commons.

**Guiding Principles and Values**

1. The BHL-Africa consortium works with the international taxonomic community, rights holders, and other interested parties to ensure that this biodiversity heritage is made available to a global audience through open access principles.
2. **Open Access**: This digital content served by the BHL is available without cost, can be reused by other projects and users, and is either in the public domain or subject to the Creative Commons CCBY license.
3. **Collaboration**: BHL-Africa participants will actively collaborate to achieve shared project objectives.
4. **Interoperability**: BHL systems will interoperate with major biodiversity project systems.
5. **Transparency**: The processes and administration of the BHL will be clear and documented.
Proposed Organizational structure

1. Initially, BHL-Africa will be organized according to **western, central, eastern,** and **southern African** regions (nodes). Others may be added later.
2. Within each region, there will be BHL-Africa nodes comprised of one or more scanning institutions. Membership within nodes will be at the institutional level.
3. The Steering Committee will be composed of one member from each node. The Steering Committee will oversee BHL-Africa activities in their nodes. The Steering Committee will be responsible for electing Executive Council members.
4. Executive Council members will be overseeing day-to-day activities of BHL-Africa.

Funding

BHL-Africa will be comprised of a 3 level funding structure:

1. Committing resources within your institution for your digitization
2. Pulling together resources among BHL-Africa partners in a specific node
3. Proposal writing and fund raising for BHL-Africa by the Executive Council

Expected Outcomes

BHL-Africa will provide a body of digital biodiversity information openly available to users such as conservationist, researchers, students, and the larger community.

Benefits

The benefits of participating within BHL-Africa includes easy access to biodiversity literature, improved visibility of member institutions, capacity building within partner institutions (developing staff skills, sharing experiences, building digitization infrastructure), sharing information among partner institutions and the world, archiving material, and reaching new audiences.

Timeframes

Interim regional leadership should be assigned now. Over the next three months these regional leaders will collect feedback about the Concept Document; In 3 months this group will reconvene to review feedback and present coordinated MOU created from institutional MOUs.

It is the aim of all the African nodes to have BHL-Africa officially launched within the next year. SANBI was nominated as the lead institution to write a proposal to receive funding to bring institutional representatives to Berlin10. It was also accepted that SANBI would be the lead institution while BHL-Africa is getting organized.