

What Your Acquisitions Colleagues Need to Know About Cataloguing

Anne Welsh  0000-0002-5621-7490

Beginning Cataloguing

Received: 4 Dec 2024 | Published: 16 Dec 2024

ABSTRACT

This article explores cataloguing knowledge and skills needed by acquisitions staff. It explores the diverse backgrounds of acquisitions professionals and the complexities of and changes in cataloguing standards, highlighting developments in cataloguing standards and models, including the IFLA Library Reference Model (LRM), ISBD, RDA, and BIBFRAME, relevant to acquisitions work. Aimed primarily at cataloguers, it is hoped to also be useful to acquisitions colleagues themselves.

KEYWORDS cataloguing standards; acquisitions; LRM; ISBD; RDA; BIBFRAME

CONTACT Anne Welsh  anne@beginningcataloguing.com  Beginning cataloguing

Acknowledgements

I would like to thank the organisers of the National Acquisitions Group Forum (for public library staff) and Seminar (for academic library staff) for scheduling me to speak at both events. Although the information in this article is aimed at cataloguers who work with acquisitions colleagues, I hope that the information contained in it will also be of use to acquisitions staff themselves.

Introduction

Much has been written about the streamlining of library services across all sectors such that the number of fully-trained cataloguers working in most institutions has reduced since the publication of the Calhoun Report ([Calhoun, 2006](#)), which despite actually presenting “Thirty-Two Options and Three Strategies” ([Calhoun, 2006](#), p. 12) from which management teams were invited to choose the most appropriate for their own circumstances, is often cited by those making redundancies in bibliographic services as proof that in-house cataloguing is no longer needed. Suffice it to say here that in both public and academic libraries there is a dearth of staff with confidence in the depth of their cataloguing knowledge. If you are fortunate enough to work in an environment in which it is easy for you to find experienced cataloguers to answer your questions, treasure them. If you are reading this and self-identifying as one of those

cataloguers, make sure you are asking for a suitable paycheck from your employer in return for your expertise.

21st century library acquisitions staff come from a mixture of backgrounds: library, procurement and general administration being the most common. Their skill set is high: they have to know where to find the materials library patrons require and acquire them and in order to do so they have to understand an increasingly complex set of systems, some of them in-house, but many of them external to the library. Some of them may be budget holders, but even those who are not still have to understand and work within the local budgeting calendar. Some of them may be working within a library management system acquisitions module; some may have to process orders through non-library systems; most have to do both. For new books, they have to deal with advance information from publishers, which is subject to change in every key aspect: the title, author(s) and even the ISBN upon arrival may be different from that advertised at the point of ordering. As we know, Publishing is a fast-moving world, and our acquisitions colleagues need to be just as fast to keep up with it.

In some settings, some acquisitions staff work closely with subject librarians to select new materials; in others, they work directly with the user community, perhaps through a library committee or advisory board. Either way, a certain amount of political or diplomatic skill is necessary. In almost every workplace, there are some last-minute orders that need to be processed quickly. The introduction of patron-driven acquisition in most environments needs a high level of skill from the acquisitions team leaders to assist senior management in deciding on the checks and balances required to ensure that they have not essentially given end-users a blank cheque to buy obscure articles and books.

In short, our colleagues working in acquisitions have to hold a wide range of knowledge that goes beyond the world of cataloguing and cataloguing standards. Given the number of articles, blog posts and presentations we in the cataloguing community make about the wide range of changes in cataloguing practice and standards, it's understandable that most acquisitions colleagues are keen to keep abreast of what is going on for us. Whether they download and / or create records in MARC or not, they know that's the exchange format we've been using since the 1960s, and so they wonder about this new format BIBFRAME. Those who trained in LIS up to ten years ago will have learned AACR2, and so they want to know how different RDA is. Those who download shelf-ready records at the acquisitions stage may also have questions around how much RDA they may also be seeing without realising it. As I have been asked by literally countless acquisitions professionals over the last five years¹, "Have I been changing things that are 'right' in RDA back into AACR2 thinking where they were 'wrong'?" The reason given for asking me is usually either "I've asked the cataloguer and they're not sure" or "We don't have a cataloguer at work for me to

¹ Beginning Cataloguing started trading in March 2020, and I delivered a few pro bono training sessions under its brand from September 2019 onwards (Welsh, 2024).

ask.” Sometimes it is “I don’t want to annoy the cataloguer(s)” or “I’m too scared to ask at work.”

So, with all this in mind, this article shares the key points that I think busy acquisitions professionals in most workplaces would like to know. If you’re reading this as a bibliographic services manager with a mixed team of cataloguers and acquisitions staff, I hope it will be helpful to you. If you’re reading as an experienced cataloguer, I hope it will give you more power to your elbow to ask the bibliographic services manager or acquisitions team leader or whoever manages the acquisitions staff, if you can give a short presentation to the acquisitions team to bring them up-to-speed on changes already being felt by the introduction of RDA internationally and the gearing up towards increased Linked Data, most likely through BIBFRAME. As I often say to colleagues who are either shy about presenting or, more commonly, shy about asking questions, “Enquiring minds need to know!” ([keaoli, 2015](#))²

IFLA LRM

The International Federation of Library Associations and Institutions (IFLA) *Library Reference Model* (LRM) ([Riva, Le Bœuf and Žumer, 2017](#)) has been around since 2017 and it and its predecessors are foundational to both the *International Standard Bibliographic Description* (ISBD) ([Elena et al., 2022](#)) and *Resource Description and Access* (RDA), which began to replace the *Anglo-American Cataloguing Rules. 2nd Edition* (AACR2) from 2013 onwards.

Most cataloguers, most days, don’t need to think about the LRM when they are cataloguing something, but they do have to think about it sometimes, and if you’ve noticed we’ve started to talk about “elements” and / or “agents” in our cataloguing jargon, that’s coming through from the LRM. Similarly, if you’ve heard us talking about “WEMI” or the “WEMI model” that’s coming from the LRM (and its predecessors). The acronym is drawn from the four elements: Work, Expression, Manifestation and Item, which are often described as different “levels”. The theoretical underpinning is centred on the relationships between different publications and the “agents” responsible for them. Agents can be human beings or institutions, and the most common are authors, editors, translators, producers and directors, but there are many others we can include in our catalogue data. By thinking about the WEMI inherent in the publications we are cataloguing, we can describe relationships that are more nuanced than we could before.

In most libraries, the LMS doesn’t need people to think about WEMI at the acquisitions stage, but if it’s interesting to them, acquisitions professionals can read the LRM and follow developments on the IFLA website ([IFLA, no date a](#)).

² It’s an old meme, but it makes the point that people are always asking questions about things some people might find odd.

ISBD

I mentioned ISBD in passing. Anyone who learned about it before 2018 would most likely be aware of it as the root of the rules that determine much of the punctuation we use in catalogue metadata. It still is. As the IFLA website puts it, “The ISBD determines the data elements to be recorded or transcribed in a specific manner and sequence as the basis of the description of the resource being catalogued, and employs prescribed punctuation as a means of recognising and displaying data elements in library catalogues and making them understandable independently of the language of the description” ([IFLA, no date b](#)).

You may notice that word “elements” creeping in again. If you think that’s coming from the LRM, you would be correct. In fact, in 2018, the IFLA ISBD Review Group started work on a review of the ISBD with the aim of “aligning the ISBD with the LRM to keep a consistency between IFLA standards by providing the overarching conceptual model with an ISBD implementation” ([IFLA, no date b](#)). If you work in a big enough, engaged enough library, some of the cataloguers may have been sending responses to various calls for comments from IFLA on the ISBDM, which, as you may have guessed is ISBD for Manifestations – “Manifestation” being one of the elements in the WEMI model set out in the LRM.

In some countries, and in a small number of libraries in the UK, the ISBD is *the* cataloguing standard in use. In most libraries in the UK, ISBD is more in the background, but if you work in a library that is using RDA, it’s worth being aware that the ISBDM review was carried out with an awareness of RDA and its decisions are compatible with it ([IFLA, no date c](#)).

RDA

RDA itself grew out of AACR2. When the Joint Steering Committee (JSC) for AACR began working on AACR3, they saw a need to do more than simply amend and build on what was there. In 2005, the JSC reported that they were working on RDA as “a new code” that would “simplify ... provide more consistency ... improve collocation” through an approach that was “principle-based ... founded on international cataloguing principles” ([Joint Steering Committee for Revision of AACR, 2005](#), slides 2-3). Crucially, they referenced the approach that would be taken by the LRM.

Sadly, the first of these aims, to “simplify the code” ([Joint Steering Committee for Revision of AACR, 2005](#), slide 2) proved harder to achieve than expected, resulting in a long period of development, which can be summarised as follows:

2010	RDA published in an online form in the <i>RDA Toolkit</i> .
2021-17	Regular updates.
2017-2020	<i>RDA Toolkit Restructure and Redesign</i> (referred to as the 3R Project).
2018	<i>RDA Toolkit</i> beta site published with new text (referred to as Official RDA).
December 2020	The text of the original toolkit was moved to original.rdatoolkit.org and the text of Official RDA was moved to access.rdatoolkit.org .

As at December 2024, the only English-speaking library that has implemented Official RDA is the National Library of New Zealand ([National Library of New Zealand, 2024](#)). If you are working in a UK library that is using RDA, it is using Original RDA. Libraries have until the end of May 2027 to move to Official RDA ([RDA Board, 2023](#)).

This means that whoever is responsible for the cataloguing policy and practice in libraries must make key decisions. In particular, you may increasingly hear talk about work on an “Application Profile”. This is essentially the repository of all the decisions about which options within Official RDA your library will take. An application profile often takes the form of a spreadsheet, but it may also be Policy Statements (either inside or outside the *RDA Toolkit*) or some sort of local manual, which might be a document on your shared drive or intranet, or could be a wiki. Some libraries may choose to follow the British Library Policy Statements, which are contained within the *RDA Toolkit*. In any case, I would expect that if acquisitions staff need to make changes to their processes, whoever oversees cataloguing policy and procedures would let them know.

There is a place, however, in which acquisitions staff may be seeing metadata based on RDA. If you download records from a library supply database it is most likely to be RDA. You may notice differences from the way things looked before, and you may have to take it on trust that these differences are probably RDA. In case it helps, here’s an idea of the age of metadata and whether it is likely to be RDA or AACR2:

Before 2010	Metadata was created in AACR2 in MARC.
2010-2011	The Library of Congress coordinated tests of RDA in MARC across several major US libraries. The earliest RDA in MARC metadata was created as part of these tests.
2011 onwards	Some US libraries who took part in the US tests continued to create metadata in RDA in MARC.
2013	The earliest UK-created metadata began to appear as Original RDA was implemented by the British Library (including its Cataloguing-In-Preparation metadata, supplied by BDS).
2013 onwards	Increasingly more RDA metadata created in an increasing number of libraries worldwide.

Many libraries and consortia carried out batch modifications where these were possible, so that even if you are downloading records created before 2010, some of their fields and subfields may have been modified to be RDA-compliant. This can result in hybrid records that were created under AACR2 but have been partly (or mainly) changed by a computer transformation to include some RDA.

The business need for acquisitions staff to know about these kinds of changes varies from library to library. Some acquisitions staff don't download records at all. Others download records but only need to check a few fields, such as ISBN, author, title and format are correct.

DCRMR

Few acquisitions staff deal with rare materials, but in the interests of completeness, it may be worth sharing *Descriptive Cataloging of Rare Materials. RDA Edition (DCRMR)* ([RBMS Bibliographic Standards Committee, 2022](#)) with them. A free resource, it can be described as an application profile in that it identifies how RDA is applied to rare materials. It also works well in terms of translating existing library concepts into the jargon used by RDA, so it can be useful for those who trained in cataloguing before RDA.

BIBFRAME

Few acquisitions staff have not come across references to BIBFRAME in the literature and / or at conferences and other meetings. For those who work outside the LMS, BIBFRAME is likely to be irrelevant, but they may be professionally curious to know that the Library of Congress is working on a replacement for the MARC format which they intend will exploit the full capacity of RDA for linked data. Those who work within the LMS will probably be glad of some reassurance that changes by your software provider

are some way in the future. Both groups of acquisitions staff may or may not want to know that there is lots of information on BIBFRAME on the Library of Congress website, including details of conversion programs from MARC to BIBFRAME ([Library of Congress, 2024](#)).

MARC

That brings us neatly back to MARC. The level of MARC knowledge that acquisitions staff need varies from library to library and from role to role. Given that the “MARC must die” papers which were so prevalent a few years ago did the rounds of the acquisitions conferences, it is probably worth reinforcing that MARC looks set to remain for a few years yet – the Library of Congress itself is continuing to catalogue concurrently in MARC and BIBFRAME while it continues to develop BIBFRAME. The MARC manuals continue to be provided free ([Library of Congress, 2023](#)).

AACR2

Finally, what is there to say about AACR2? Within UK Higher Education libraries, AACR2 is an artefact of the past, but it does continue to be used in many other settings. If you are working in an RDA library, I think it’s worth reinforcing that “weird stuff” in the catalogue (or in metadata downloaded from other people’s catalogues) *may* be old, following pre-RDA rules. And if someone has been trained in cataloguing under AACR2, they do not need to relearn *everything*. The title is still the title; the publisher is still the publisher; the size of a book and the runtime of a movie still are as they are.

Cataloguing in the 21st century, still remains the intellectual activity of examining the output of a publisher, analysing it, and describing it in ways that will enable someone seeking it to find it – even when the seeker does not know the specific thing they seek exists. As to how the library came to acquire that specific thing? That’s a matter for our acquisitions colleagues. We just catalogue the materials they acquire.

References

- Calhoun, K. (2006) *The Changing Nature of the Catalog and its Integration with Other Discovery Tools*. Final Report. Washington DC: Library of Congress. Available at: <https://www.loc.gov/catdir/calhoun-report-final.pdf> (Accessed: 11 December 2024).
- Elena, E.R. et al. (2022) *ISBD International Standard Bibliographic Description: 2021 Update to the 2011 Consolidated Edition*. Den Haag: IFLS. Available at: <https://repository.ifla.org/handle/20.500.14598/1939>
- IFLA (no date a) *IFLA’s Bibliographic Conceptual Models*. Available at: <https://www.ifla.org/g/cataloguing/ifla-s-bibliographic-conceptual-models/> (Accessed: 11 December 2024).
- IFLA (no date b) *About the ISBD*. Available at: <https://www.ifla.org/g/isbd-rg/international-standard-bibliographic-description/> (Accessed: 11 December 2024).

- IFLA (no date c) *ISBD for Manifestation (ISBDM)*. Available at <https://www.ifla.org/g/isbd-rg/isbd-for-manifestation-isbdm/> (Accessed: 11 December 2024).
- Joint Steering Committee for Revision of AACR (2005) *RDA: Resource Description and Access*. Revised July 8. Available at: <https://www.rdatoolkit.org/archivedsite/docs/rdapptjuly2005.pdf> (Accessed: 11 December 2024).
- keaoli (2015) 'Enquiring minds need to know!' [Imgur] 27 October. Available at: <https://imgur.com/gallery/enquiring-minds-need-to-know-HTyi1PB> (Accessed: 11 December 2024).
- Library of Congress (2024) *Bibliographic Framework Initiative*. Available at: <https://www.loc.gov/bibframe/> (Accessed: 11 December 2024).
- Library of Congress (2023) *MARC Standards*. Available at: <https://www.loc.gov/marc/> (Accessed: 11 December 2024).
- National Library of New Zealand (2024) *MARC Record Changes Due to RDA Implementation*. Available at: <https://natlib.govt.nz/librarians/cataloguing-standards-at-the-national-library/marc-record-changes-due-to-rda-implementation> (Accessed: 11 December 2024).
- RBMS Bibliographic Standards Committee (2022) *Descriptive Cataloging of Rare Materials*. RDA Edition. Available at: <https://bsc.rbms.info/> (Accessed: 11 December 2024).
- RDA Board (2023) *Countdown Clock for Original RDA Toolkit Set for May 2026*. Available at: <https://www.rdatoolkit.org/news/rda/countdown-clock-original-rda-toolkit-set-may-2026> (Accessed: 11 December 2024).
- Riva, P., Le Boëuf, P. and Žumer, M. (2017) *IFLA Library Reference Model: A Conceptual Model for Bibliographic Information*. Amended and corrected. Den Haag: IFLA. Available at: <https://repository.ifla.org/handle/20.500.14598/40>
- Welsh, A. (2024) 'Yesterday marked five years since I gave my first pro bono workshop under the Beginning Cataloguing brand' [LinkedIn]. Available at: <https://www.linkedin.com/feed/update/urn:li:activity:7238098729214377984/> (Accessed: 11 December 2024).