

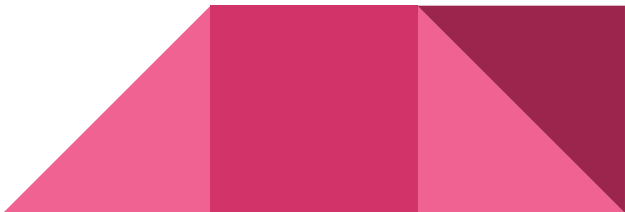
# Policy Matters

Using RBMS Policy Statements and Official RDA Toolkit  
for Rare Book Cataloging

Laura Doublet, Rebecca Flore, Jessica Grzegorski,  
and Jessie Sherwood

RBMS 2026 Conference  
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# Overview

- I. Prelude: What is RDA? What are policy statements?
  - II. Development of RBMS Policy Statements for RDA Toolkit
  - III. Using and interpreting RBMS Policy Statements
  - IV. RBMS and Library of Congress (LC)-Program for Cooperative Cataloging (PCC) documentation
  - V. Looking ahead
- 

# Prelude

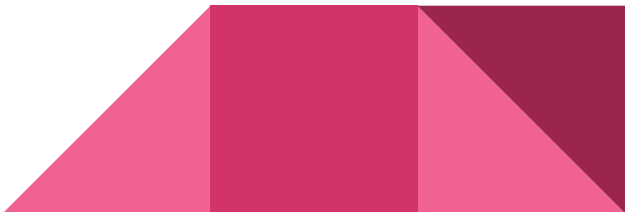
# What is RDA?

## **RDA = *Resource Description and Access***

- Subscription-based international cataloging standard published online as RDA Toolkit ([access.rdatoolkit.org](https://access.rdatoolkit.org))
- First published in 2010 as successor to *Anglo-American Cataloguing Rules*, 2nd ed. (AACR2) and based on [Functional Requirements for Bibliographic Records](#) (FRBR) and similar conceptual models
- Significantly revised and realigned with [Library Reference Model](#) (LRM) in 2019
- Both versions currently available (2010 = “Original RDA Toolkit”; 2019 = “Official RDA Toolkit”)
- Original RDA Toolkit will cease to exist in current form on May 11, 2027



# What are policy statements?

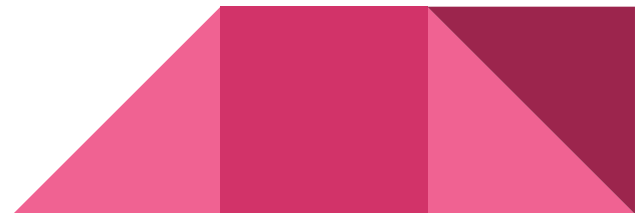
- Guidance within RDA Toolkit that defines application or interpretation of, or deviation from, specific RDA instructions
  - Policy statement sets maintained by separate national libraries, organizations, and communities of practice (e.g., British Library, LC-PCC, Music Library Association (MLA))
  - Serve similar purpose to what Library of Congress Rule Interpretations (LCRIs) did for AACR2
  - Not part of base RDA text; individual groups maintain and update their own policy statements
- 



# Development of the RBMS Policy Statements

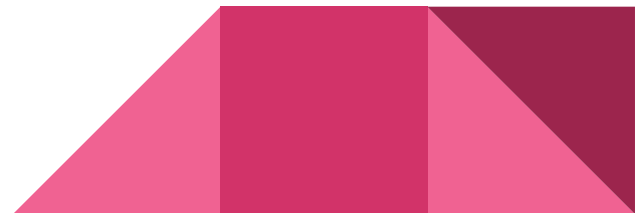
# Policy statements: a brief timeline

- 2010 – RDA released
- 2011 – BSC decided to base future iterations of DCRM on RDA
- 2012 – DCRM/RDA Task Force created
- 2013 – RDA implemented by LC and the PCC
- Proposal to develop DCRM based on RDA
- 2014 – Decision to create policy statements for RDA



# Policy statements: a brief timeline

- 2016 – Launch of the 3R Project
- 2017 – Initial draft of the policy statements completed
- 2018 – Policy Statement subgroup / RBMS-PS
- 2019 – Revised RDA Toolkit released
- BSC pivoted to integrating resources + policy statements
- 2020 – Editorial Group began work on a RDA-aligned DCRM



# Policy statements: a brief timeline

- 2022 – DCRMR published
- Work on policy statements re-started
- 2023 – Internal review of DCRMR policy statements
- 
- 2025 – BSC review of policy statements complete
- RBMS-PS published in the Official RDA Toolkit





# Using and Interpreting RBMS Policy Statements

| ENTITIES | GUIDANCE | POLICIES | RESOURCES | All  |
|----------|----------|----------|-----------|---------------------------------------------------------------------------------------|
|----------|----------|----------|-----------|---------------------------------------------------------------------------------------|

Policies

# Rare Books and Manuscripts Section Policy Statements

RBMS Policy Statements for Entity Chapter

RBMS Policy Statements for Guidance Chapter

## RBMS Policy Statements

The RBMS Policy Statements are maintained by the RBMS RDA Editorial Group, a subgroup of the [Bibliographic Standards Committee \(BSC\)](#) of the Rare Books and Manuscripts Section (RBMS) of the Association of College and Research Libraries (ACRL), a division of the American Library Association (ALA). The statements provide

- BLPS
- LAC PS
- LC-PCC PS
- MLA BP
- NLNZ PS
- OLAC BP
- RBMS PS**

RBMS Policy Statements for Entities

RBMS Policy Statements for Guidance

**Landing page for RBMS PS in RDA Toolkit: Policies > RBMS PS**

# RBMS Policy Statements for Entities

Click on the active links to browse RBMS Policy Statements by entity. A grayed out link means that there are no policy statements for that entity.

- RDA Entity
- [Work](#)
- [Expression](#)
- [Manifestation](#)
- [Item](#)
- Agent
- Person
- Collective Agent
- Corporate Body
- Family
- Nomen
- Place
- Timespan



**Statements available for hyperlinked entities**

# RBMS Policy Statements for date of publication

## Prerecording

### Option →

Do not apply the option. See DCRMR [5.23.3](#) .

## Recording

### Condition Option →

Do not apply the option. Record all dates as they appear. If no date appears in the Julian or Gregorian calendar, record all dates as they appear and supply the Julian or Gregorian year(s) in square brackets. See DCRMR [5.23.3.1](#) , [5.23.31.6](#) .

- Policy statement landing pages for individual elements show statements but not RDA instructions
- Viewing statements alongside instructions requires Toolkit subscription

Entities > [Manifestation](#) > [title of manifestation](#)

# title of manifestation

## Definition and Scope

A nomen that is an appellation of manifestation in natural language and phrasing used in common discourse.

 [Element Reference](#)

## Prerecording

A manifestation may have no title, or one or more titles that may appear:

Select Policy Statement Set (6)

RBMS PS (27) ▼

Show None

BLPS (49)

LAC PS (0)

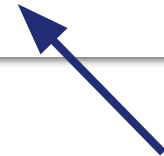
LC-PCC PS (50)

MLA BP (45)

NLNZ PS (53)

OLAC BP (4)

**RBMS PS (27)**



**Access RBMS Policy Statements within Toolkit from dropdown menu in right rail**

# Toolkit settings configured to display RBMS PS by default

View

RBMS PS

Settings

RDA Template

RDA Standard

▼

Language

English

▼

Access

 Private

▼

Policies

☒ BLPS

☒ LAC PS

☒ LC-PCC PS

☒ MLA BP

☒ NLNZ PS

☒ OLAC BP

☒ RBMS PS

Primary Policy

RBMS PS

▼

☒ Always open related policies with instruction

- Possible to configure custom view in Toolkit to default to displaying RBMS PS as primary set
- Select “RBMS PS” from “Primary Policy” dropdown
- Instructions for creating profiles and managing views available in RDA training documentation from PCC ([loc.gov/catworkshop/rda/index.html](http://loc.gov/catworkshop/rda/index.html))
  - Module 4 (slides 14-15)
  - Module 7 (slides 3-10)

# RBMS Policy Statements for Name of publisher element

## CONDITION OPTION

Record a value that appears in the language or script of a title proper.

## CONDITION OPTION

Record a value in the language or script that appears first.

## CONDITION OPTION

Record one or more values separately in the order indicated by the sequence, layout, or typography of the *source of information*.

[Send to Back](#)

## RBMS

Apply the option. See DCRM 5.22.39.1 , 5.225.3.3

## RBMS

Apply the option if none of the names appears in the language or script of the title proper. See

[Send to Back](#)

## RBMS

Do not apply the option. See DCRM 5.22.39.1 , 5.225.3 .

# Why are RBMS Policy Statements structured this way?

- Limited space for text in the right rail of the Toolkit (i.e., brevity is best)
- Instructions in DCRMR are tailored to rare materials catalogers, while RDA is for a general audience; easier to direct users to DCRMR for specific, clarifying information than to reproduce text in RDA
- Boilerplate text simplifies editorial process of writing and revising policy statements
- Reusing boilerplate text reduces number of typos and other errors



# Backend view of RBMS Policy Statement in DITA markup

RBMS\_name\_of\_publisher.dita

Paragraph

Division id="4c51b444-ac7a-404e-91b4-44ac7a904ec8" Paragraph id="p\_mfg\_dpz\_kgc"

Phrase id="ph\_w24\_dpz\_kgc" conkeyref="b\_ps\_rbms/ph\_nv1\_1qr\_fg" Apply the option. See DCRMR Phrase

Phrase id="ph\_thk\_2pz\_kgc" conkeyref="b\_ps\_rbms/ph\_ixm\_qtm\_hgc"

Cross Reference href="https://bsc.rbms.info/DCRMR/ppdm/Name-of-publisher/#5.22.39.1" scope ... 5.22.39.1

Cross Reference Phrase , Phrase id="ph\_hny\_2pz\_kgc" conkeyref="b\_ps\_rbms/ph\_xzw\_stm\_hgc"

Cross Reference href="https://bsc.rbms.info/DCRMR/ppdm/Parallel-name-of-publisher/#5.225.3" scope ... 5.225.3.3

Cross Reference Phrase . Paragraph Division Division

Division id="7a6701f2-894c-4107-a701-f2894c010750"

Paragraph outputclass="title" id="f6bf694a-7a69-4b64-bf69-4a7a69cb649b"

Cross Reference outputclass="ps\_link" keyref="rdamP30176/div\_h12\_jmc\_4hb" Condition Option Cross Reference

Paragraph

Division id="255b6db8-116c-4536-9b6d-b8116c253668" Paragraph id="p\_vbp\_jpz\_kgc"

Phrase id="ph\_e4w\_jpz\_kgc" conkeyref="b\_ps\_rbms/ph\_okh\_fzr\_fg" Apply the option if none of the names appears in the language or script of the title proper. See DCRMR Phrase

Phrase id="ph\_xmh\_kpz\_kgc" conkeyref="b\_ps\_rbms/ph\_ixm\_qtm\_hgc"

Cross Reference href="https://bsc.rbms.info/DCRMR/ppdm/Name-of-publisher/#5.22.39.1" scope ... 5.22.39.1

Cross Reference Phrase , Phrase id="ph\_qsb\_lpz\_kgc" conkeyref="b\_ps\_rbms/ph\_klj\_wtm\_hgc"

Cross Reference href="https://bsc.rbms.info/DCRMR/ppdm/Parallel-name-of-publisher/#5.225.3" scope ... 5.225.3

Cross Reference Phrase . Paragraph Division Division

- All RDA Toolkit content (including policy statements) is coded in DITA (XML-based standard)
- Key feature of DITA: reusability of content via key references
- Boilerplate language populated from a single document minimizes need to manually type every word in every PS

# Anatomy of a policy statement in RDA Toolkit

- Solid line denotes the beginning of a policy statement
- Dashed line denotes the end of a policy statement
- “Send to Back” function places an overlapping policy statement behind the one above to make full text of PS above visible

**RBMS**

[Send to Back](#)

Apply the option. See DCRM 5.22.39.1 , 5.225.3.3

.

**RBMS**

Apply the option if none of the names appears in the language or script of the title proper. See

**RBMS**

[Send to Back](#)

Do not apply the option. See DCRM 5.22.39.1 , 5.225.3 .

# Using “Send to Back” function

Send to Back

## RBMS

Apply the option. See DCRM 5.22.39.1 , 5.225.3.3

## RBMS

Apply the option if none of the names appears in the language or script of the title proper. See

Send to Back

## RBMS

Do not apply the option. See DCRM 5.22.39.1 , 5.225.3 .

Send to Back

## RBMS

Apply the option. See DCRM 5.22.39.1 , 5.225.3.3

## RBMS

Apply the option if none of the names appears in the language or script of the title proper. See DCRM 5.22.39.1 , 5.225.3 .

Do not apply the option. See DCRM 5.22.39.1 , 5.225.3 .

## A few more considerations

- More than 3,000 elements in RDA element set, but RBMS Policy Statements cover only a fraction of them
- RBMS Policy Statements tied to DCRMR; if DCRMR does not cover an element or particular condition in RDA, there will be no RBMS PS
- DCRMR focuses heavily on manifestation- and item-level RDA elements
- Catalogers must rely on RDA Toolkit and possibly other policy statements (e.g., LC-PCC) for elements out of scope for DCRMR and RBMS PS (e.g., agent elements often used for authority work)



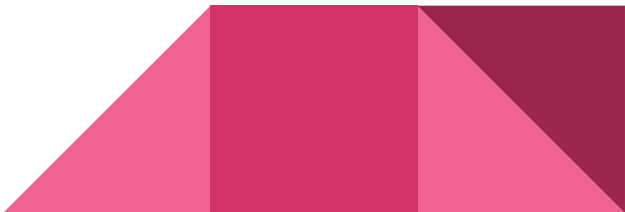
# Live Demo





# RBMS and Library of Congress-Program for Cooperative Cataloging (LC-PCC) Documentation

# RBMS and Library of Congress Documentation

- 1981 - Bibliographic Description of Rare Books (BDRB)
  - 1991, revised 1998 - Descriptive Cataloging of Rare Books (DCRB)
  - 2007 - Descriptive Cataloging of Rare Materials (Books) (DCRM(B))
  - 2022 - Descriptive Cataloging of Rare Materials (RDA Edition) (DCRMR)
- 

# RBMS and PCC (Program for Cooperative Cataloging) Documentation

- The BIBCO Standard Record (BSR) for original RDA includes provisions for cataloging rare materials
- Rare materials instructions are included for these DCRM manuals: books, cartographic, graphics, and music



# DCRM and RDA

## **Bibliographic Standards Committee (BSC) statement on DCRM and RDA**

Books - Apply one of the following:

1. Catalog according to DCRM for description cataloging and the official RDA toolkit for access points
2. Create RDA records by applying the provisions for rare materials included in the RDA BIBCO Standard Record (BSR)

# PCC BIBCO Standard Record (BSR) for Original RDA

- The BSR for original RDA includes provisions for rare materials
- The applicable DCRM manual(s) and relevant section numbers are included

| RDA INSTRUCTIONS & ELEMENTS | RDA NO.               | NOTES                                                                                                                                                                                                                                                                                                                                                                                                                                                               | MARC ENCODING |
|-----------------------------|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| Place of publication (T)    | <a href="#">2.8.2</a> | <p>For cataloging purposes, all online resources are considered published.</p> <p>If more than one, only the first recorded is required.</p> <p>Also transcribe current place if it differs (for multipart monographs).</p> <p><b>Rare materials:</b> Generally transcribe all places of publication (see DCRM(B,C,G,M) 4B6). If a place of publication is known to be fictitious or incorrect, supply a correction in square brackets (see DCRM(B,C,G,M) 4B9).</p> | 264           |
| Publisher's name (T)        | <a href="#">2.8.4</a> | <p>If more than one, only the first recorded is required.</p> <p>Also transcribe current publisher if it differs (for multipart monographs).</p> <p><b>Rare materials:</b> Generally transcribe all publishers' names (see DCRM(B,C,G,M) 4C6). If a publisher's name is known to be fictitious or incorrect, supply a correction in square brackets (see DCRM(B,C,G,M) 4C5).</p>                                                                                    | 264           |

## Rare Materials (Books, Cartographic Resources, Graphics, and Notated Music)

| ELEMENT                                                                   | NOTES                                                                                                                                                                                                                            | MARC ENCODING |
|---------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| <b>Leader</b>                                                             |                                                                                                                                                                                                                                  |               |
| Type of record                                                            | <b>Rare books:</b> Use “a” or “t”<br><b>Rare cartographic resources:</b> Use “e” or “f”<br><b>Rare graphics:</b> Use “k”<br><b>Rare music:</b> Use “c” or “d”                                                                    | Ldr/06        |
| Bibliographic level                                                       | <b>Rare books, rare music:</b> Use “m”<br><b>Rare cartographic resources, rare graphics:</b> Use “m” or “a”                                                                                                                      | Ldr/07        |
| Encoding level                                                            | Use ‘blank’ value                                                                                                                                                                                                                | Ldr/17        |
| Descriptive cataloging form                                               | Use “i” (ISBD punctuation included) or “c” (ISBD punctuation omitted)<br>For more information on options for omission of punctuation, see:<br><a href="#">PCC Guidelines for Minimally Punctuated MARC Bibliographic Records</a> | Ldr/18        |
| <b>Variable Control Fields –<br/>Physical Description Fixed<br/>Field</b> |                                                                                                                                                                                                                                  |               |
| Category of material                                                      | Use for rare cartographic resources, rare graphics, and microform reproductions of rare materials.                                                                                                                               | 007/00        |
| Specific material designation                                             |                                                                                                                                                                                                                                  | 007/01        |
| Color                                                                     | (Rare cartographic resources and rare graphics only)                                                                                                                                                                             | 007/03        |
| Physical medium                                                           | (Rare cartographic resources only)                                                                                                                                                                                               | 007/04        |
| Primary support material                                                  | (Rare graphics only)                                                                                                                                                                                                             | 007/04        |

# Official RDA BSR Introduction - Beta Version

## Guidelines for Rare Materials (Books, Cartographic Resources, Graphics, and Notated Music)

The rare materials provisions in the BSR are closely aligned with the provisions of [Descriptive Cataloging of Rare Materials \(DCRM\)](#) and may be used with any resources deemed rare by the cataloging agency.

As is the case with the general provisions of the BSR, the rare materials provisions represent an essential set of elements to which other elements can be added. They are not intended to reproduce or replace *DCRM*, and elements in *DCRM* not in the BSR can certainly be included in the record.

# Official RDA BSR Introduction - Beta Version

The BSR may also be used together with guidelines and policy statements provided by user communities. While many of these policies have been included in the BSR, referring to the primary documentation of these communities is highly recommended. Currently, the BSR references selected guidelines from the music, rare materials ... communities.

Guidelines adjacent to the BSR include:

- [Descriptive Cataloging of Rare Materials for Official RDA \(DCRMR\)](#)
- DCRM manuals ([Cartographic materials](#), [Graphic materials](#), [Music](#))

# BSR for Official RDA--Beta Version

| OFFICIAL RDA ELEMENT NAME or GUIDANCE                                | SUPERELEMENT   | ELEMENT SUPERTYPE(S)                                  | OFFICIAL RDA DOMAIN           | OFFICIAL RDA RANGE    | General / Core / Recommended?                                             | NOTES                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------------|----------------|-------------------------------------------------------|-------------------------------|-----------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Manifestation Elements</b>                                        |                |                                                       |                               |                       |                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <a href="#">title proper</a>                                         | not applicable | <a href="#">title of manifestation</a>                | <a href="#">Manifestation</a> | <a href="#">Nomen</a> | PCC Core Element                                                          | <p>For general guidance, see also <a href="#">title of manifestation</a>.</p> <p><b>Archival materials:</b> Most titles will be devised by the cataloger, per <a href="#">Devised titles for archival resources and collections</a>. Additional guidance on the formulation of titles may be found in <a href="#">DACS 2.3</a>.</p> <p><b>Rare materials:</b> Generally do not abridge titles.</p>                                                  |
| <a href="#">parallel title proper</a>                                | not applicable | <a href="#">title of manifestation ; title proper</a> | <a href="#">Manifestation</a> | <a href="#">Nomen</a> | PCC Core Element                                                          | <p><b>PCC Core Element</b> for all materials. Record all.</p> <p><b>Rare materials:</b> Generally do not abridge titles.</p>                                                                                                                                                                                                                                                                                                                        |
| <a href="#">other title information</a>                              | not applicable | not applicable                                        | <a href="#">Manifestation</a> | not applicable        | PCC Core Element                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <a href="#">variant title of manifestation</a>                       | not applicable | <a href="#">title of manifestation</a>                | <a href="#">Manifestation</a> | <a href="#">Nomen</a> | <p>PCC Recommended Element</p> <p>PCC Core Element for rare materials</p> | <p><b>PCC Core Element</b> for rare materials when required by <a href="#">DCRM</a>.</p>                                                                                                                                                                                                                                                                                                                                                            |
| <a href="#">statement of responsibility relating to title proper</a> | not applicable | <a href="#">statement of responsibility</a>           | <a href="#">Manifestation</a> | not applicable        | PCC Core Element                                                          | <p>For monographs, only the first recorded statement of responsibility relating to title proper is required, but catalogers are encouraged to transcribe (or record in a note) any other statements of responsibility that aid in resource discovery, identification, and selection.</p> <p><b>Rare materials:</b> Generally record all statements of responsibility relating to title proper appearing in the preferred source of information.</p> |

# BSR for Official RDA--Beta Version

| OFFICIAL RDA ELEMENT NAME or GUIDANCE | SUPERELEMENT                          | ELEMENT SUPERTYPE(S)                           | OFFICIAL RDA DOMAIN           | OFFICIAL RDA RANGE    | General / Core / Recommended? | NOTES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------|---------------------------------------|------------------------------------------------|-------------------------------|-----------------------|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">name of publisher</a>     | <a href="#">publication statement</a> | <a href="#">name of agent of manifestation</a> | <a href="#">Manifestation</a> | <a href="#">Nomen</a> | PCC Core Element              | <p>PCC Core Element for manifestations in published form.</p> <p><b>Rare materials:</b> For rare materials, in most cases, transcribe all names of publisher (<a href="#">DCRMR 5.22.31</a>, <a href="#">DCRM(C,G,M) 4C6</a>). Record a fictitious or false name of publisher as it appears on the manifestation. Record a real value known from another source of information. If a name of publisher is known to be fictitious or incorrect, supply a correction in square brackets (see <a href="#">DCRMR 5.22.34</a>, <a href="#">DCRM(C,G,M) 4C5</a>)</p> |

**Rare materials:** For rare materials, in most cases, transcribe all names of publisher (see DCRMR 5.22.31; DCRM(C,G,M,S) 4C6). Record a fictitious or false name of publisher as it appears on the manifestation. Record a real value known from another source of information. If a name of publisher is known to be fictitious or incorrect, supply a correction in square brackets (see DCRMR 5.22.34, DCRM (C,G,M) 4C5)

# BSR for Official RDA + LC-PCC Policy Statements

The BSR is intended to be used with the Library of Congress - Program for Cooperative Cataloging (LC-PCC) policy statements found in the official RDA Toolkit

Entities > [Manifestation](#) > [title proper](#)

## title proper

### Definition and Scope

A nomen that is a title of manifestation that is selected for preference in a specific application or context.

An alternative title is treated as part of a title proper.

Select Policy Statement Set (4)

LC-PCC PS



## name of publisher

### Recording

Record this element as a value of Nomen: [nomen string](#) or as an instance of a [Nomen](#).

For a variation in a value of this element that is associated with a unit or iteration of a manifestation that embodies a *diachronic work*, see Guidance: Resource description. Describing a manifestation. [Describing a manifestation of a diachronic work](#).

### CONDITION

Two or more values for this element appear in the *source of information*.

### CONDITION OPTION

Record the value that appears first.

### CONDITION OPTION

Record one or more values separately in the order indicated by the sequence, layout, or typography of the *source of information*.

### CONDITION

Select Policy Statement Set (4)

LC-PCC PS



[Send to Back](#)

### LC-PCC

LC/PCC practice: See the Metadata Guidance documentation: [Manifestation: printer corporate body: government printers](#).

LC/PCC practice: See the Metadata Guidance documentation: [Manifestation: printer corporate body: privately printed works](#).

[Send to Back](#)

### LC-PCC

LC/PCC practice: Apply the option.

[Send to Back](#)

### LC-PCC

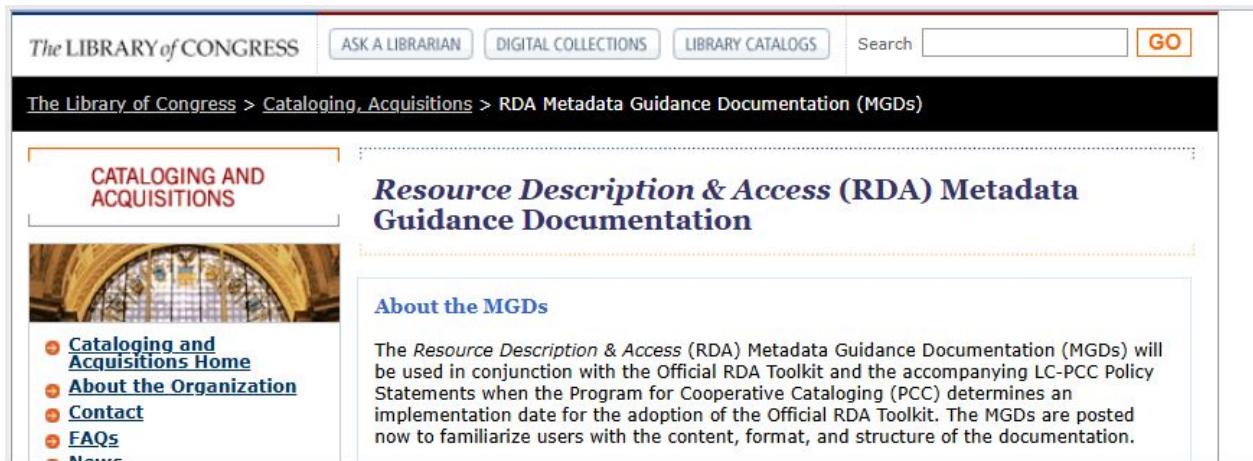
LC/PCC practice: Apply the option.

PCC practice: For rare materials, in most cases, transcribe all names of publisher (see DCRM [5.22.31](#); DCRM(C,G,M,S) 4C6).

RDA Toolkit  
Citation #  
13.20.54.33

# BSR for Official RDA + LC-PCC Policy Statements + Metadata Guidance Documentation

The BSR is intended to be used with the Library of Congress - Program for Cooperative Cataloging (LC-PCC) policy statements found in the official RDA Toolkit and the Metadata Guidance Documentation (MGDs) available on the LC website



The screenshot shows the Library of Congress website. At the top, there is a navigation bar with links for "ASK A LIBRARIAN", "DIGITAL COLLECTIONS", and "LIBRARY CATALOGS", along with a search box and a "GO" button. Below this, a breadcrumb trail reads: "The Library of Congress > Cataloging, Acquisitions > RDA Metadata Guidance Documentation (MGDs)". The main content area is titled "Resource Description & Access (RDA) Metadata Guidance Documentation". On the left side, there is a sidebar with the heading "CATALOGING AND ACQUISITIONS" and a list of links: "Cataloging and Acquisitions Home", "About the Organization", "Contact", "FAQs", and "More". The main text area contains a section titled "About the MGDs" which states: "The Resource Description & Access (RDA) Metadata Guidance Documentation (MGDs) will be used in conjunction with the Official RDA Toolkit and the accompanying LC-PCC Policy Statements when the Program for Cooperative Cataloging (PCC) determines an implementation date for the adoption of the Official RDA Toolkit. The MGDs are posted now to familiarize users with the content, format, and structure of the documentation."

<https://www.loc.gov/aba/rda/mgd/>

# BSR for Official RDA + LC-PCC Policy Statements + Metadata Guidance Documentation

MGDs are also linked in the relevant LC-PCC policy statements

Entities > [Manifestation](#) > [date of publication](#)

**date of publication**

Select Policy Statement Set (4)  
**LC-PCC PS** ▼

**Prerecording**

This element is a *subelement* of the *superelement* Manifestation: [publication statement](#) →.

For general guidance and instructions on recording a statement from a manifestation that reproduces another manifestation, see Guidance: Manifestation statements.  
[Manifestation statements of facsimiles and reproductions](#) →.

**OPTION**

Record an unstructured description within a value of Manifestation:  
[manifestation publication statement](#) →.

**LC-PCC** [Send to Back](#)

LC/PCC Core.

PCC practice: For rare materials, see DCRM [5.23.3](#); DCRM(C,G,M,S) 4D1.

LC/PCC practice: See the Metadata Guidance documentation: [Manifestation elements](#)

LC/PCC practice: See the Metadata Guidance documentation: [Timespan](#).

RDA Toolkit  
Citation #  
[82.98.60.69](#)

# Metadata Guidance Documentation

Currently, only the following MGDs have provisions for rare materials

- Basic Cataloging Decisions
- Relationship WEMI-WEMI
- Transcription-Punctuation
- String Encoding Schemes: Scale
- Entities > Manifestation > place of publication



# MGD Example - Transcription-Punctuation

## **In-house Guidelines vs. RDA Rules, Metadata Guidance**

The agency creating the data may establish in-house guidelines for capitalization, punctuation, numerals, symbols, abbreviations, etc., or choose a published style manual, etc. (e.g., The Chicago Manual of Style), as its preferred guide. In such a situation, for capitalization of transcribed elements, catalogers are encouraged (but not required) to follow RDA Resources > Community resources > Community vocabularies > [Terms in specific languages](#); it is permitted to "take what you see" on the resource. For punctuation, numerals, symbols, etc., follow the RDA Guidance > Transcription guidelines > [Guidelines on normalized transcription](#), relevant LC-PCC Policy Statements, and this metadata guidance. If supplying information in brackets or providing a romanized form, apply cataloger's judgment to follow the appropriate guidance or not.

For rare materials, use [Descriptive Cataloging of Rare Materials](#) as the "designated published style manual".

# RBMS and Library of Congress-Program for Cooperative Cataloging Documentation

- DCRMR
- DCRM(C,G,M)
- Official RDA Toolkit
- LC-PCC Policy Statements
- Metadata Guidance Documentation

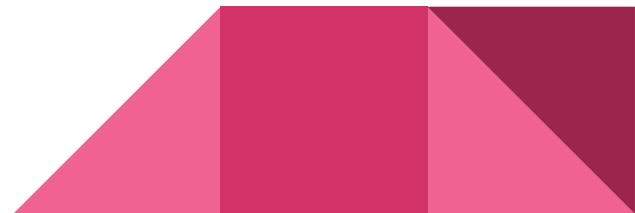




# Looking Ahead

# Maintenance

- New releases of the RDA Toolkit occur three times a year
- RBMS RDA Editorial Group reviews upcoming changes to the Toolkit and edits PSs accordingly



# Maintenance

- When published, new releases are announced in the News module of the RDA Toolkit homepage

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Welcome To RDA Toolkit

Last Toolkit Release: 2026-02

**News** All News >

 What to Know About the Countdown Clock: a Webinar

The Countdown Clock for the Original RDA Toolkit began on May 11. This short webinar will explain what the countdown clock means for cataloguing institutions; what will happen to the Original RDA Toolkit; and how to transition to Official RDA.

 The Countdown Clock and Transitioning to Official RDA

**The Countdown Clock**

On May 11, 2026 a Countdown Clock appeared in the top blue banner of the Original RDA Toolkit

This clock will count the final 365 days that the Original Toolkit will be available online and serve as a daily reminder that your institution needs to prepare for the transition to the Official RDA Toolkit.

 Upcoming Event – Perspectives on Teaching Official RDA

The 3rd Meeting on Education for Information Organization "New Pedagogical and Technological Perspectives for Teaching and Applying the Official RDA Toolkit in the Training of Librarians"

**NEW RELEASE** February 2026 RDA Toolkit Release

The latest release to RDA Toolkit took place on February 6. It is a relatively small release in terms of changes made by the RSC, but there are new examples and the introduction OLAC(On-line Audiovisual Catalogers) Best Practices.

**Profile Login**

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**Recently Updated Instructions**

Element: preferred name of corporate body  
2026/02/06

Element: variant access point for expression  
2025/10/09

Element: variant access point for place  
2025/10/09

Element: authorized access point for corporate body  
2025/10/09

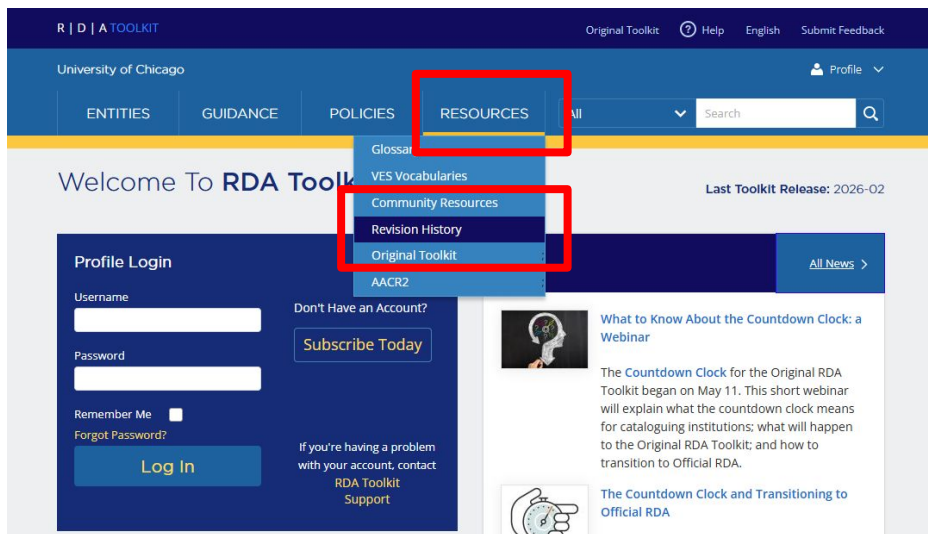
Element: authorized access point for timespan  
2025/10/09

Element: preferred name of place  
2025/10/09

Element: preferred name of place  
2025/10/09

# Maintenance

- More detailed release notes are shared under Resources > Revision history



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Resources > Revision History > Notes on the February 6, 2026 Toolkit Release

Notes on the February 6, 2026 Toolkit Release

Select Policy Statement Set (0)RBMS PS

The February 2026 release is a light one. It includes a few corrections based on feedback submitted to RDA Toolkit, new examples, and a number of changes based on [RSC/FT2025-1/Decisions](#). Updates and corrections were made to policy statements from the British Library, Library Archives Canada, Library of Congress/Program for Cooperative Cataloging, RMBs, and the National Library of New Zealand.

This release also introduces the best practices from the On-line Audiovisual Catalogers (OLAC). To access the OLAC BP, you will need to change your Institutional Views (click the administration button in the toolbar at the bottom of the Toolkit window) or your Profile Views (click the Views button on the top most toolbar). In both cases, click on Manage Views and then check the box next to OLAC BP and save your change.

In the next week or so, updates will be made to translations of RDA Toolkit in Spanish, Finnish (including policy statements) and French language policy statements from Library Archives Canada.

The Release Notes below describe more significant changes to the English version. This release is based on GitHub release 5.4.12 of RDA Reference data.

The next release will take place in June, 2026.

Each individual release note includes the title of the element or page where changes have been made, a brief description of the revision, and download links for PDFs of both the new version of the page and the previous version of the page. The PDFs may be uploaded into document comparison software to reveal the exact nature of changes in a file. There are a range of choices for comparing documents, both free and downloadable, free and paid. Some suggested free online options include [Diffchecker](#), [Draftable online](#), [I-net PDFC](#), and [TextCompare](#).

Release Notes

| Page                                             | Release Note                                                                           | New PDF | Previous PDF |
|--------------------------------------------------|----------------------------------------------------------------------------------------|---------|--------------|
| Corporate Body: preferred name of corporate body | Condition Option added in line with <a href="#">RSC/ReligionsWG/2025/1/Decisions</a> . | PDF     | PDF          |

Example updates were made to the following pages: [access point for corporate body](#), [art director person of](#), [art director person of](#), [editor person of moving image work](#), [editor person of moving image work of](#), [access point for corporate body](#), [preferred name of corporate body](#), [preferred name of person](#), [puppeteer person](#), [puppeteer person of](#), [supplementary content](#), [voice actor person](#), and [voice actor person of](#).

Document Date: 2026/02/18  
Document: [https://access.rdatoolkit.org/en-US\\_topic\\_02060206\\_RN](https://access.rdatoolkit.org/en-US_topic_02060206_RN)

← Revision History

Notes on the October 9, 2025 Toolkit Release →

# Maintenance

- Substantive revisions to RBMS Policy Statements will be announced by the RBMS RDA Editorial Group on DCRM-L
- Subscribe to DCRM-L at <https://listserver.lib.byu.edu/mailman/listinfo/dcrm-l>



# Ongoing Development

- Considering areas for new policy statement development
- RBMS Policy Statements will be revised to accommodate future developments in RDA, like adding or deprecating elements
- RBMS Policy Statements will be revised as additional DCRM manuals are integrated into DCRMR
- Before new policy statements are added to the Toolkit, drafts are circulated to the BSC for comment



# Questions or concerns?

Reach out to [dcrm.rda@gmail.com](mailto:dcrm.rda@gmail.com)

