

Report of the PCC Task Group on RDA and the BIBCO Standard Record (BSR) for Textual Monographs

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Revised March 15, 2012 based on comments from SCS

Revised April 06, 2012 based on comments from PCC Policy Committee

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The Task Group was charged with making recommendations for a BSR for textual monographs that would be compatible with RDA (the full charge can be viewed at [http://www.loc.gov/catdir/pcc/scs/RDA_BSR_Charge -- Final.docx](http://www.loc.gov/catdir/pcc/scs/RDA_BSR_Charge_-_Final.docx)). This final report will address all of the main areas in the charge, and includes four appendices:

[Appendix A: RDA Implementation Dependencies](#)

[Appendix B: Revision of the PCC RDA FAQs](#)

[Appendix C: Revisions to “Characteristics of the BIBCO Standard Record \(BSR\)”](#)

[Appendix D: Draft RDA BSR for Textual Monographs](#)

Charge and Recommendations

The group had six main elements in its charge; each is listed below and followed by comments and recommendations.

1. *Examine the document LC RDA Core Elements for November 2011—(combination of RDA “Core” and RDA “Core if” elements plus additional elements), available at http://www.loc.gov/aba/rda/pdf/rdaprep_core_elements.pdf.*

The Task Group used as a basis for its work the most current version of the *LC RDA Core Elements* document (December 23, 2011), available at: <http://www.loc.gov/aba/rda/>.

While the existing [AACR2 BSR for textual monographs](#) is organized along a baseline of MARC fields, the group resolved that an RDA BSR should instead be organized along a baseline of RDA metadata elements. As the cataloging community begins a transition out of MARC and into other metadata encoding schemas, or as PCC considers BIBCO-level contributions using other metadata standards (e.g., Dublin Core, MODS), equivalent encoding schemas can be added to the end of the document, making it more extensible than it would be if organized around MARC.

The *LC RDA Core Elements* document is already presented along a baseline of RDA elements, and includes useful information about FRBR entities, and mappings to relevant MARC fields and coding, all of which the Task Group has retained in the RDA BSR.

The existing AACR2 BSR defines elements as being either Mandatory (M) or Mandatory if Applicable (A). The latter variously translates to “if present on the resource” (e.g., edition statement, series statement), “if appropriate to the resource” (e.g., dissertation note), or “if consistent with agency policy” (e.g., “the inclusion of varying title information is intended to reflect individual cataloger judgment and/or local institutional policy”).

While it may be tempting to equate ‘Mandatory if applicable’ elements with RDA ‘Core if’ elements, they are not synonymous. RDA pre-defines some elements as core and requires them for resource description “when applicable and readily ascertainable” (RDA 0.6.1). Some are core only under certain conditions, usually when one or more core RDA elements cannot be ascertained (e.g., ‘Copyright date is itself core only if the neither the Date of publication nor the date of distribution can be identified).

RECOMMENDATION 1: In order to avoid confusion between RDA’s language of “core” and the existing AACR2 BSR’s language of “mandatory” and “mandatory if applicable,” the Task Group recommends defining elements as either RDA Core or BSR Core (i.e., additional elements core to the BSR, but not core in RDA), along similar lines that the Library of Congress has defined in its “LC RDA Core Elements.” The Task Group has integrated this new language into the draft RDA BSR for Textual Monographs in [Appendix D](#).

2. *Decide if there are any areas within the above document where PCC catalogers should or would be allowed to differ from the treatment given by the Library of Congress catalogers.*

The Task Group recognized the need to maintain the overall intent of the BSR to represent a “floor” of essential elements needed to fulfill the primary user tasks of find, identify, select, and obtain. The group did not include elements from ‘LC RDA Core Elements’ that would not be considered core for a BSR:

- Dimensions (RDA 3.5);
- Notes on changes in carrier characteristics (RDA 3.22.6);
- Summarization of the content (RDA 7.10);
- Supplementary content (RDA 7.16);
- Library of Congress Control Number (MARC 010) as a required data element.

The group also revised some of the language in the “Decision with qualification” column of the RDA BSR, usually to reflect the PCC (not LC) context, or to provide more explicit guidance.

RECOMMENDATION 2A: While the Task Group recognized that the spirit of the BSR as a “floor” should be maintained, it may be particularly important during the transition period that the PCC have a BSR that also highlights elements that, though not core, would still be recommended because of their ability to aid in user tasks. To that end, the Task Group included a section of elements that are additionally “Recommended.” Each recommended element is also part of ‘LC RDA Core Elements,’ but goes beyond what the PCC has previously considered required elements for a floor. They are:

- Contributor (RDA 20.2);
- Related work (RDA 25.1);
- Related expression (RDA 26.1);
- Related manifestation (RDA 27.1);
- Related item (RDA 28.1).

Encouragement for going beyond RDA Core requirements is included for three additional RDA elements in the BSR: *Statement of responsibility relating to the title proper* (RDA 2.4.2); *Creator* (RDA 19.2); *Other person, family, or corporate body associated with a work* (RDA 19.3). The Task Group chose not to repeat these three elements again in the “Recommended” section of the BSR chart, and instead integrated those recommendations into the main body of the BSR.

RECOMMENDATION 2B: Because the LCPSs are currently under review, the Task Group decided to remove the asterisk (*) from the LC document indicating when there was an LCPS for that particular RDA instruction. The existence of an LCPS will be apparent in the Toolkit.

3. *The group should also consider any MARC developments being pursued that might facilitate recording data elements in the MARC 21 Bibliographic Format.*

The only MARC development currently underway that will imminently affect the BSR is the recent approval of the [MARC 264](#) field as the alternative to recording production, publication, distribution, manufacture, and copyright notice. Because this new field is scheduled to be integrated into OCLC around the same time that the RDA BSR would be approved and released for use, the Task Group removed all references to using the MARC 260 field, and replaced them with the MARC 264 field. However, because the 260 field is not being made obsolete, members are concerned that current documentation is not explicit enough about the relationship between the 260 and 264 fields, and how they are expected to be used.

RECOMMENDATION 3: The PCC (that is, BIBCO and CONSER jointly) should issue a clear statement about the relationship between the 260 and the 264, including guidance on: when/if it may be appropriate to use one field over the other; when/if it may be appropriate to have both a 260 and a 264 in the same record; when/if catalogers might choose to replace a 260 in an existing copy record with a 264 field.

4. *Call upon experts from other format communities for input on the inclusion of core data elements specific to those communities.*

This Task Group was exclusively charged with developing an RDA BSR for Textual Monographs, and did not have a need to call upon other format communities to fulfill that part of its charge. However, the group did discuss possibilities for how the PCC could approach addressing RDA for the other eight formats/resource types that currently have AACR2 BSRs (archival collections, cartographic materials, electronic resources, graphic materials, notated music, moving image materials, rare books, and sound recordings).

Beyond the suite of continuing resources-related RDA elements forming part of the CONSER Standard Record, and those RDA elements that are exclusive to authority records, there are only a few remaining RDA core elements that *do not* apply to bibliographic records for textual monographs. They are:

- Medium of performance (RDA 6.15);
- Numeric designation of a musical work (RDA 6.16);
- Key (RDA 6.17);
- Horizontal scale of cartographic content (RDA 7.25.3);
- Vertical scale of cartographic content (RDA 7.25.4).

The organization of RDA around FRBR entities (as opposed to AACR2's organization in Part I around having separate chapters for each resource type) lends itself to PCC developing a single BSR for *all* non-continuing resources formats and resource types. Many of the differences between the existing BSRs are related not to descriptive data, but fixed or coded MARC data. The current [LC RDA Core Elements](#) document already illustrates what a collective BSR might look like, with format-specific elements simply being given qualifying notes on their specific application. If an element is not relevant or applicable to the resource being cataloged, it is ignored.

RECOMMENDATION 4A: PCC should consider developing a collective BIBCO document that brings all RDA Core, RDA 'Core if,' and BSR Core RDA elements together in a single BSR for all formats, supplemented with guidelines for fixed and coded MARC data for each of the nine formats and resource types presently defined with separate BSRs.

RECOMMENDATION 4B: The other format communities that developed the existing AACR2 BSRs should be consulted again, with an eye to defining which additional RDA elements would be defined as PCC Core for their respective domains, while still maintaining the "floor" principle of the BSR. For example, LC defines *Layout* (RDA 3.11) as an 'LC RDA Core Element' for cartographic resources; other format communities should each be asked to propose BSR Core elements along similar lines.

RECOMMENDATION 4C: The Task Group felt that proliferation of separate guidelines on how to apply or interpret RDA instructions should be limited. The PCC should consult ALA Publishing and the JSC to consider ways PCC guidelines could be integrated directly into the RDA Toolkit itself, much like the LCPS statements are currently. Integration of the guidelines in this way would aid the cataloger in terms of being aware of, accessing, and following the guidelines. The RDA BSR would still be made available as a separate document on the PCC website for those who are not Toolkit subscribers. The Task Group also supports and encourages any efforts, such as those currently being explored by the PCC RDA Policy Statements Task Group, to unify PCC policies into a single set of RDA policy statements.

5. *The group will consider whether any changes or additions need to be made to the BSR for Textual Monographs FAQ (available at: <http://www.loc.gov/catdir/pcc/bibco/BSR-MAPS.html>).*

RECOMMENDATION 5: The BSR for Textual Monographs FAQs should directly reference both the overarching PCC RDA FAQ document and the post-test guidelines. The following statement should be added to the introduction of the BSR FAQ: “For more information on PCC policies and practices related to RDA, please consult the [PCC RDA FAQs](#), the [PCC Post-RDA Test Guidelines](#), and the general information collected on the [PCC RDA website](#).”

6. *Submit a report with your findings and any recommendations for further action to the Standing Committee on Standards.*

RECOMMENDATION 6A: In addition to assessing revisions to the various FAQ documents, the group also identified a need for the PCC to revise the “Characteristics of the BIBCO Standard Record (BSR)” document (http://www.loc.gov/catdir/pcc/bibco/CharacteristicsofBSR_3Sept-2010.pdf) to incorporate RDA, and highlight some issues the group identified with the existing AACR2 BSR. A draft revision of this document is included as [Appendix C](#) to this report.

RECOMMENDATION 6B: When reviewing the RDA elements *ISSN of Series* (RDA 2.12.8) and *ISSN of Subseries* (RDA 2.12.16), task group members were concerned by language in RDA that provides for recording only ISSNs that appear on the resource itself. The Task Group recommends that the Standing Committee on Standards Representative to CC:DA pursue a “fast track” proposal, via the ALA Representative to the JSC, to allow for recording ISSNs from any source, including sources outside the resource itself.

Recommended Changes in BSR Policy Resulting from the Draft RDA BSR

The Task Group is recommending several changes to existing AACR2 BSR policies in order to accommodate RDA; these changes are highlighted in yellow in the draft of the RDA BSR document. To summarize, the recommended policy changes are:

- *Parallel title proper* (RDA 2.3.3): the AACR2 BSR requires that only the first and any English parallel title be transcribed, all others are optional. RDA 2.3.3 does not present such optional omissions, nor does the RDA BSR.
- *Statement of responsibility relating to title proper* (RDA 2.4.2): task group members felt strongly that the RDA BSR guidelines should (1) allow for application of the basic RDA instruction that if there is more than one statement of responsibility relating to the title proper, only the first recorded is required, but also (2) explicitly encourage catalogers to transcribe the fullest statement of responsibility possible in BSR records to aid in the fulfillment of user tasks. This approach allows for the minimal application of RDA as a floor, leaves the element open to cataloger's judgment, but promotes fuller transcription in a way that the AACR2 BSR does not.
- *Date of publication* (RDA 2.8.6): AACR2 allowed for using a copyright date as a substitute for a missing date of publication; RDA does not. In order to avoid confusion during the transition, the Task Group wanted to explicitly clarify that in RDA the element *must* be recorded (that is, it is mandatory, not mandatory if applicable). To that end, the RDA BSR summarizes how to fulfill the core requirement (record publication date(s) found in the resource, supply date(s) in brackets, or record “[Date of publication not identified]”).
- *Note on issue, part, or iteration used as the basis for identification of the resource* (RDA 2.20.13): use of the MARC 588 “Source of Description” field is not part of the AACR2 BSR, which currently only mentions the Source of Title Proper (MARC 500) note. This RDA element is part of ‘LC RDA Core Elements’ when applicable. In the context of textual monographs, RDA 2.20.13 is especially important for recording the basis for identification of multi-part resources when the description is not based on the first part, and for this reason was included as a BSR Core element.
- *Media type* (RDA 3.2): Media type is a new element introduced by RDA, and was not in AACR2; it is not core in RDA. The element is core for LC, and the Task Group is recommending it also be BSR Core, especially during this transition period as we continue to learn how this element can best be employed in catalogs.
- *Carrier type* (RDA 3.3): Carrier type is a new element introduced by RDA, and was not in the AACR2 BSR; it is core in RDA.
- *Identifying Works and Expressions* (RDA Chapter 6): in RDA, the only relationship required is to the principal creator (1XX). There is no RDA requirement for an AACR2-style “main entry” for a work title [i.e., an authorized access point for a work that does not begin with the name of a person, family, or corporate body (coded 130)], but there is an RDA requirement that the work be identified. One way to fulfill the requirement is to include an authorized access point for the work and/or expression (whether that is a name/preferred title or preferred title alone). The Task

Group recognizes that “identifying works and expressions” is not referring to the authorized access point for the principal creator. However, since the creator is usually part of an authorized access point for the work, we thought it appropriate to make reference to RDA 19.2 here.

- *Content type* (RDA 6.9): Content type is a new element introduced by RDA, and was not in the AACR2 BSR; it is core in RDA.
- *Illustrative content* (RDA 7.15): This element is not core in RDA. While the 300\$b was mandatory if applicable for the AACR2 BSR, it does not contribute significantly to access. Both this TG and the PCC/LC PSD RDA Policy Statements Task Group agreed to make this element optional/cataloger’s judgment for an RDA BSR record.
- *Cataloging source: Language of cataloging* (MARC 040; RDA 0.11.2): the Task Group recommends that the PCC and the bibliographic utilities discuss making it a core requirement to always record the language of cataloging in PCC RDA records, even for English. The Task Group has made the 040\$b a core element in the BSR, and for consistency’s sake, recommends that CONSER also consider this change in its existing policy for the CONSER Standard Record.
- *Library of Congress Control Number* (MARC 010): while the LCCN/010 is listed in the AACR2 BSR as being ‘Mandatory if applicable,’ in practice it was only applicable to LC’s catalogers. LC can continue to require this identifier for its records, but it will no longer form part of the BSR and has been removed.

Additional Comments

- *Extent* (RDA 3.4): *Extent* is a core element in RDA only if the resource is complete or if the total extent is known; the AACR2 BSR requires the 300\$a in all cases. Following RDA would technically represent a change in existing PCC policy. Members of both this TG and the PCC/LC PSD RDA Policy Statements Task Group recommend going beyond RDA and continuing PCC practice of requiring extent whether the resource is complete or not (e.g., for an incomplete multipart monograph, the cataloger would record the type of unit, but not the number: 300\$a volumes).
- The organization of the RDA BSR along a baseline of RDA elements, as opposed to MARC coding and fields means the BSR will not be presented in an order of MARC fields that reflects a bibliographic record. While some catalogers may be used to and prefer a BSR document ordered by MARC fields, the PCC Policy Committee is not in favor of creating a second MARC version of the BSR, which would lose all connection to the organization of RDA around FRBR concepts.

Task Group Members

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Appendix A: RDA Implementation Dependencies

RDA-related task groups are asked to prepare an appendix to the final report with a timeline/calendar that:

- Outlines the steps that need to be taken for completing RDA-related tasks;
 - Identifies who will be responsible for those tasks;
 - States the time frame and order in which tasks should be accomplished prior to implementation;
 - Lists any other dependencies that might need to be considered.
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Timeframe

- Final report submitted to the Standing Committee on Standards by March 9, 2012
- Review by SCS concluded and report forwarded to Policy Committee by March 23, 2012
- Review by PoCo and Steering Committees by April 6, 2012
- Report is announced to PCCLIST and posted for community comment by April 12, 2012
- Discussion at OpCo, May 3-4, 2012

The only dependency to implementation (beyond approval of PCC membership and PoCo) is the implementation of MARC 264 in OCLC (see Recommendation 3 in the final report). The RDA BSR draft currently assumes that the PCC will recommend using the 264 field instead of the 260 field. If the timing for the MARC 264 implementation in the bibliographic utilities is delayed, or the PCC makes a different policy decision, the RDA BSR could be revised accordingly.

Appendix B: Revision of the PCC RDA FAQs (<http://www.loc.gov/catdir/pcc/PCC-RDA-FAQ.html>)

The Task Group recommends adding the following FAQ in section three of the PCC RDA FAQs:

3.8 What form of access point should be recorded in BIBCO or CONSER records? Should I only include RDA access points in RDA bibliographic records? Should I only include AACR2 access points in AACR2 bibliographic records?

Please consult the [PCC Post-RDA Test Guidelines](#) for information on using AACR2 and RDA access points in bibliographic records.

There are two additional areas in the FAQs (sections 5.4 and 7.4) that will require revision resulting from the work of this task group:

5.4 Will the CONSER Standard Record, BIBCO Standard Record(s) and other PCC standards (such as provider-neutral) be rewritten for RDA?

The need for evaluating these has been noted in the final report of the [PCC RDA- Decisions-Needed Task Group](#). Both BIBCO and CONSER have appointed groups to work on evaluating and recommending changes to the standard record to accommodate RDA. Work on these tasks has been ongoing since fall 2011.

The PCC Standing Committee on Standards is reviewing provider-neutral record guidelines and reproduction policies in light of RDA.

(Proposed addition: The PCC Task Group on RDA and the BIBCO Standard Record (BSR) for Textual Monographs was the first group to look at the existing BSRs in light of RDA. The final report of that group, as well as a constituency-review draft of the RDA BSR for Textual Monographs, is available at: [insert URL here]. The final report on RDA provider-neutral records is available at: [insert URL here].)

7.4 My institution is currently a NACO member and was planning to join BIBCO [or CONSER or SACO] to contribute AACR2 records (in the cases of BIBCO and CONSER). Should I wait and join later, when RDA is implemented?

No.

There is no need to wait to join BIBCO, CONSER or SACO. BIBCO and CONSER training currently assumes that catalogers are skilled in using AACR2 for bibliographic record creation, and instruction focuses on applying the BIBCO Standard Record and CONSER Standard Record, respectively. At this point, SACO training is unaffected by RDA implementation.

(Proposed addition: There is no planned “implementation date” after which all libraries are expected to catalog in RDA and before which they are not supposed to. [PCC “Day One” for authority records](#) is March 31, 2013, when it will no longer be permitted to add AACR2 authority records to the National Authority File. There is no similar “Day One” planned for bibliographic records contributed under the BIBCO or CONSER programs. BIBCO and CONSER Libraries, however, do not need to wait for “Day One” to begin contributing RDA monographic, integrating resource, or serial records to the BIBCO/CONSER programs, or to begin contributing RDA authority records to the LC/NACO Authority File. After “Day One” all NACO libraries will be required to contribute all authority work in RDA but may if they choose continue to contribute BIBCO/CONSER records in AACR2.)

Appendix C: Revisions to “Characteristics of the BIBCO Standard Record (BSR)”

In addition to assessing revisions to the various FAQ documents, the group also considered revisions to the “Characteristics of the BIBCO Standard Record (BSR)” document (http://www.loc.gov/catdir/pcc/bibco/CharacteristicsofBSR_3Sept-2010.pdf) to incorporate RDA. Appendix C now represents that revised document in its entirety.

Characteristics of AACR2 BIBCO Standard Records (BSR)

May 2012

These characteristics apply to AACR2 BIBCO records in all formats.

1. The BSR is a “floor” record that promotes an essential set of elements to serve user needs. Emphasis is given to access points, not to extensive descriptive data. The BSR supports the importance of controlled subject and name access points.
2. The BSR element set includes those elements that are mandatory (M) and those elements that are mandatory if applicable (A). The BSR element set uses those elements in a way that avoids unessential and redundant elements. Essential elements support user tasks to find, identify, select, and obtain needed resources.
3. BIBCO Standard Records are considered to be as full as is necessary for the basic user tasks. The BSR recognizes that individual resources have unique needs that may, in the judgment of the cataloger, require additional elements. Elements not included in the BSR element set may be added, if determined by cataloger judgment and/or local policy to be important for identification or access.
4. Main entry headings (1XX), name or LCSH subject headings (6XX), genre/form terms (655), appropriate added entries (7XX), and series added entries (8XX) must be supported by authority records established through the NACO and SACO programs.
5. Using the defined element set in the BSR will allow the consistency for more uniform data and will allow catalogers to concentrate on appropriate added access.
6. BSR content is supported through use of MARC 21 Format for Bibliographic Data.
7. The BSR is intended for use by experienced catalogers knowledgeable in AACR2, LCRIs, national standardized classification systems, and subject systems.
8. During the course of drafting the RDA BSR, several areas in the AACR2 BSR were identified as needing clarification. They are the following:
 - a. Lack of specification in the AACR2 BSR concerning the statement of responsibility. No direction is given about level of description (AACR2 1.0D1 or 1.0D2) as to recording any subsequent statements of responsibility. Most catalogers have followed 1.0D2.
 - b. The Source of description note field (MARC 588) was not included in the original BSR. This normally is used with all serials and online resources, but is also used

with monographic sets where the description is based on volumes other than the first.

- c. The Library of Congress Control Number (MARC 010) was listed as being ‘Mandatory if applicable.’ While technically this is true, in fact it is only the Library of Congress for which it is actually applicable.

Characteristics of RDA BIBCO Standard Records (BSR)

May 2012

These characteristics apply to RDA BIBCO records in all formats.

1. The BSR is a “floor” record that promotes an essential set of elements to serve user needs. Emphasis is given to access points, not to extensive descriptive data. The BSR supports the importance of controlled subject and name access points.
2. The BSR element set includes those elements that are core and ‘core if’ in RDA, as well as additional elements that are defined by PCC as ‘BSR core.’ The BSR element set uses those elements in a way that avoids unessential and redundant elements. Essential elements support user tasks to find, identify, select, and obtain needed resources.
3. BIBCO Standard Records are considered to be as full as is necessary for the basic user tasks. The BSR recognizes that individual resources have unique needs that may, in the judgment of the cataloger, require additional elements. Elements not included in the BSR element set may be added, if determined by cataloger judgment and/or local policy to be important for identification or access.
4. If included in the metadata, authorized access points for persons, families, corporate bodies, works, and expressions (1XX, 7XX), subject access points following LCSH (6XX), genre/form terms (655), and authorized access points for series (8XX) must be supported by authority records established through the NACO and SACO programs, or must follow the policies of those programs in cases where an authority record is not required by program policy.
5. Using the defined element set in the BSR will allow the consistency for more uniform data in catalog records and allow catalogers to concentrate on appropriate added access.
6. BSR content is supported through use of MARC 21 Format for Bibliographic Data.
7. The BSR is intended for use by experienced catalogers knowledgeable in RDA, Library of Congress Policy Statements (LCPS), national standardized classification systems, and subject systems.

Appendix D: Draft RDA BSR for Textual Monographs

This document is a combination of RDA “Core,” “Core if,” and “BSR core plus” elements applicable to textual monographs. *Elements that represent a change in policy or practice from the AACR2 BSR for Textual Monographs are highlighted in yellow.*

See separate RDA BSRs when necessary (such as for rare books and electronic manifestations of textual monographs); elements not relevant to textual monographs are not included below.

BSR elements not related to RDA, or treated in MARC control fields, are included in a separate table at the end of this document.

Explanation of symbols in this table:

“Element” column:

- A plus sign (“+”) identifies additional elements, beyond the RDA “core” and RDA “core if” elements, selected by PCC to be core elements in records for textual monographs.
- A “**T**” in parentheses identifies a transcribed element per RDA instruction (“take what you see”) or per LC’s existing policy for alternative in that instruction.
- An “**R**” in parentheses identifies additional elements that, while not core in RDA or the BSR, the PCC *recommends* and encourages catalogers include when the element may be useful to support user tasks (find, identify, select, and obtain).

“**FRBR**” column: Specifies the FRBR/FRAD entities applicable to that RDA element:

| | |
|--------------------|-------------------|
| C = corporate body | M = manifestation |
| E = expression | P = person |
| F = family | PL = place |
| I = item | W = work |

RDA & BSR Core Elements

| Element | RDA no. | FRBR | Notes | MARC encoding |
|--|------------------------|------|---|---------------|
| IDENTIFYING MANIFESTATIONS AND ITEMS | | | | |
| Title proper (T) | 2.3.2 | M | | 245 |
| Parallel title proper (T) + | 2.3.3 | M | Record all. | 245 |
| Other title information (T) + | 2.3.4 | M | | 245 |
| Later title proper (T) + | 2.3.8 | M | Reminder: applies to multipart monographs. | 246 |
| Statement of responsibility relating to title proper (T) | 2.4.2 | M | If more than one, only the first recorded is required by RDA, but catalogers are encouraged to transcribe as many statements of responsibility that are possible and appropriate to aid in resource discovery, identification, and selection. | 245 |
| Designation of edition (T) | 2.5.2 | M | | 250 |
| Designation of a named revision of an edition (T) | 2.5.6 | M | | 250 |
| Date of production | 2.7.6 | M | Record date of production for a resource in unpublished form. | 264 |
| Place of publication (T) | 2.8.2 | M | If more than one, only the first recorded is required. Also transcribe current place if it differs (for multipart monographs). | 264 |
| Publisher's name (T) | 2.8.4 | M | If more than one, only the first recorded is required. Also transcribe current publisher if it differs (for multipart monographs). | 264 |
| Date of publication | 2.8.6 | M | Record the publication date(s) found in the resource, or supply date(s) in brackets, or record "[Date of publication not identified]." | 264 |
| Place of distribution (T) | 2.9.2 | M | Transcribe for a published resource, if place of publication is not identified; if more than one, only the first recorded is required. | 264 |
| Distributor's name (T) | 2.9.4 | M | Transcribe for a published resource, if publisher is not identified; if more than one, only the first recorded is required. | 264 |
| Date of distribution | 2.9.6 | M | Record date of distribution for a published resource, if date of publication is not identified. | 264 |
| Place of manufacture (T) | 2.10.2 | M | Transcribe for a published resource, if neither place of publication nor place of distribution is identified; if more than one, only the first recorded is required. | 264 |

| | | | | |
|--|-------------------------|---|--|-----------------------------------|
| Manufacturer's name (T) | 2.10.4 | M | Transcribe for a published resource, if neither publisher nor distributor is identified; if more than one, only the first recorded is required. | 264 |
| Date of manufacture | 2.10.6 | M | Record date of manufacture for a published resource, if neither date of publication, date of distribution, nor copyright date is identified. | 264 |
| Copyright date | 2.11 | M | Record copyright date for monographs, if neither the date of publication nor the date of distribution is identified. | 264 |
| Title proper of series (T) | 2.12.2 | M | | 490 |
| ISSN of series + | 2.12.8 | M | | 490 |
| Numbering within series (T) | 2.12.9 | M | | 490 |
| Title proper of subseries (T) | 2.12.10 | M | | 490 |
| ISSN of subseries + | 2.12.16 | M | Supply both ISSN of series and ISSN of subseries if both are present. | 490 |
| Numbering within subseries (T) | 2.12.17 | | | 490 |
| Mode of issuance + | 2.13 | M | Use Bibliographic level (Ldr/07) value "m". | Ldr/07 |
| Identifier for the manifestation | 2.15 | M | | 020, 024, 026-028, 074, 088 |
| Note on title + | 2.20.2 | M | Supply source of title, if applicable. | 500, 588 |
| Note on issue, part, or iteration used as the basis for identification of the resource + | 2.20.13 | M | Reminder: applies to multipart monographs and serials. | 588 |
| DESCRIBING CARRIERS | | | | |
| Media type + | 3.2 | M | | 337 |
| Carrier type | 3.3 | M | Always record in 338. For microform textual monographs, must also complete the Specific Material Designation (007/01). | 338; 007/01 |
| Extent | 3.4 | M | Always record extent, even though RDA only considers extent to be core if the resource is complete or the total extent is known. | 300 |
| | | | | |

| | | | | |
|---|------------------------|---|---|------------------------------------|
| IDENTIFYING WORKS AND EXPRESSIONS | | | The authorized access point for principal creator (if any) is required for use in conjunction with the work and expression attributes listed in this section (see also RDA 19.2 below). If a formal authorized access point for a work or expression is also included in the BSR, its form should be established following NACO policies. | |
| Preferred title for the work | 6.2.2 | W | | 130, 240, 7XX |
| Form of work | 6.3 | W | Record if needed to differentiate. | 130, 240, 7XX |
| Date of work | 6.4 | W | Record if needed to differentiate. | 130, 240, 7XX |
| Place of origin of the work | 6.5 | W | Record if needed to differentiate. | 130, 240, 7XX |
| Signatory to a treaty, etc. | 6.22 | W | Record both signatories of a bilateral treaty. | 240, 7XX |
| Other distinguishing characteristic of the work | 6.6 | W | Record if needed to differentiate. | 130, 240, 7XX |
| Content type | 6.9 | E | Always record content type as an element in 336. Also record as part of an access point if needed to differentiate. Use Type of Record (Ldr/06) values "a" or "t". | 336, Ldr/06, 006 |
| Date of expression | 6.10 | E | Record if needed to differentiate. | 130, 240, 7XX |
| Language of expression | 6.11 | E | Record if needed to differentiate. Also code in 008/35-37, 041/546. | 008/35-37, 041, 546, 130, 240, 7XX |
| Other distinguishing characteristic of the expression | 6.12 | E | Record if needed to differentiate. | 130, 240, 7XX. |
| DESCRIBING CONTENT | | | | |
| Dissertation or thesis information + | 7.9 | W | | 502 |
| Language of the content + | 7.12 | E | | 008/35-37, 041, 546 |
| Script + | 7.13.2 | E | Record for some languages (see LCPS 7.13.2.3). | 546 |

| | | | | |
|---|----------------------|---|--|----------------|
| PERSONS, FAMILIES, AND CORPORATE BODIES ASSOCIATED WITH A WORK | | | | |
| Creator | 19.2 | W | If more than one, only the creator having principal responsibility named first in resources embodying the work or in reference sources is required; if principal responsibility is not indicated, only the first-named creator is required. After satisfying the RDA core requirement, catalogers may provide additional authorized access points for creators according to cataloger's judgment. | 1XX 7XX |
| Other person, family, or corporate body associated with a work | 19.3 | W | If the authorized access point representing that person, family, or corporate body is used to construct the authorized access point representing the work). After satisfying the RDA core requirement, catalogers may provide additional authorized access points according to cataloger's judgment. | 1XX 7XX |

Recommended RDA Elements

The following table includes elements that, while not core in RDA or the BSR, the PCC *recommends* and encourages catalogers to include when the element may be useful to support user tasks (find, identify, select, and obtain).

| | | | | |
|--|----------------------|---|--|-------------|
| PERSONS, FAMILIES, AND CORPORATE BODIES ASSOCIATED WITH AN EXPRESSION | | | | |
| Contributor (R) | 20.2 | E | Cataloger's judgment for contributors to the resource beyond the principal creator of the work. | 7XX |
| | | | | |
| RELATED WORKS | | | | |
| Related work (R) | 25.1 | W | Give a contents note (no limit on number of works in the contents note unless burdensome). Give an analytical authorized access point for the predominant or first work in the compilation. Additional access points for other related works may also be included at the discretion of the cataloger. See section above for elements used to identify works and expressions. | 5XX, 7XX |

| | | | | |
|-------------------------------|----------------------|---|---|---------------------|
| | | | If local institutional cataloging policy is to trace a series, use the authorized access point form of the series established in the LC/NACO Authority File. | 8XX |
| RELATED EXPRESSIONS | | | | |
| Related expression (R) | 26.1 | E | Give a contents note (no limit on number of expressions in the contents note; use cataloger's judgment). Give an analytical authorized access point for the predominant or first expression in the compilation. Additional access points for other related expressions may also be included at the discretion of the cataloger. See section above for elements used to identify works and expressions. If local institutional cataloging policy is to trace an expression of a series, use the authorized access point form of the expression of the series established in the LC/NACO Authority File. | 5XX, 7XX, 8XX |
| RELATED MANIFESTATIONS | | | | |
| Related manifestation (R) | 27.1 | M | Make for reproductions. | 5XX, 76X-787 |
| RELATED ITEMS | | | | |
| Related item (R) | 28.1 | I | Make for reproductions, bound-withs, and for special relationships for rare materials if warranted. | 5XX, 76X-787 |

Required Non-RDA Data

The following table outlines data required by the BSR that do not map directly to RDA (e.g., classification and subject access), or data associated with bibliographic records that are encoded in the MARC 21 Bibliographic Format.

| Element | RDA no. | Notes | MARC encoding |
|-----------------------------|---------|--|---------------|
| LEADER | | | |
| Encoding level | n/a | Use Encoding level (Ldr/17) value "blank" | Ldr/17 |
| Descriptive cataloging form | n/a | Use Descriptive cataloging form (Ldr/18) value "i" | Ldr/18 |
| | | | |

| Element | RDA no. | Notes | MARC encoding |
|--|------------------------|---|-------------------|
| PHYSICAL DESCRIPTION FIXED FIELD | | | |
| Category of material | n/a | For microform textual monographs, use value “h” | 007/00 |
| FIXED-LENGTH DATA ELEMENTS | | | |
| Type of date/publication status | Varies | | 008/06 |
| Date 1 | Varies | | 008/07-10 |
| Date 2 | Varies | | 008/11-14 |
| Place of publication, production, or execution | Varies | | 008/15-17 |
| Form of item | n/a | | 008/23 |
| Language | Varies | | 008/35-37, 041 |
| Modified record | n/a | | 008/38 |
| Cataloging source | n/a | | 008/39 |
| VARIABLE FIELDS | | | |
| Cataloging source: Language of cataloging + | 0.11.2 | Always specify that the language of cataloging is English. Use “eng” | 040\$b |
| Cataloging source: Description conventions | n/a | Use “rda” | 040\$e |
| Authentication code | n/a | Use “pcc” | 042 |
| Classification numbers | n/a | Assign at least one classification number from an established classification system . | 050, etc. |
| Subject and genre/form access | n/a | Use judgment in assessing each resource. As appropriate, assign a complement of access points that provide access to at least the primary/essential and/or form of the work at the appropriate level of specificity. Assign such access points from an established thesaurus, list, or subject heading system . | 6XX |