

Rubrics for Evaluating New Applications for BCG Certification – Part 1
Revised 1 July 2025

Page 1

Instructions: For each indicator below mark the description that best applies to the work sample. Within each description, pay special attention to the words *and* (all criteria in the description must be met) and *or* (any of the criteria can be met).

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
Requirement 2—Development Activities				
DA1. Engagement in development activities Standards 89–90 ¹	The applicant has engaged in a variety of development activities aimed at improving genealogical standards attainment.	The applicant has engaged in development activities aimed at improving genealogical standards attainment but the variety of activities is limited.	The applicant’s activities are not targeted at improving genealogical standards attainment.	Development activities are missing.
Requirement 3—BCG-Supplied Document Work				
DW1. Accuracy of transcription Standards 23, 29, 32	Nearly every word and idiosyncrasy (spelling, punctuation, capitalization, signatures, or marks) is precisely rendered; obsolete letter forms are appropriately recorded; difficult or partially illegible words are transcribed; and transcriber comments are clearly identified.	More than a few words and idiosyncrasies are not precisely rendered or more than a few words are missing; obsolete letter forms are misrendered; some difficult or partially illegible words are not attempted; or transcriber comments are not clearly identified.	Many words and idiosyncrasies are not precisely rendered; many words are missing or not attempted.	The transcription is missing.
DW2. Completeness of transcription Standards 29, 32	All sections of the document are transcribed, including headings, insertions, endorsements, and notations; blots, tears, or other physical flaws affecting legibility or completeness are mentioned.	A small section of the document is omitted; or some significant physical characteristics are overlooked.	A significant section of the document is omitted; or no significant physical characteristics are noted.	The transcription is missing.
DW3. Accuracy of abstract Standards 23–24, 30–32	The abstract retains the document’s original meaning; it quotes any ambiguous words and phrases; and it identifies any editorial comments as the abstractor’s.	The abstract slightly alters or obscures the document’s meaning; or it does not clearly identify editorial comments as the abstractor’s.	The abstract significantly alters or obscures the document’s meaning.	The abstract is missing.

¹ For more information about the standards, see Board for Certification of Genealogists, *Genealogy Standards*, second edition revised (Nashville, Tennessee: Ancestry.com, 2021).

Rubrics for Evaluating New Applications for BCG Certification – Part 1
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DW4. Completeness of abstract Standards 29, 30, 32	All significant information from all parts of the document is reported; boilerplate phrases are excluded; blots, tears, or other physical flaws affecting legibility or completeness are mentioned.	A small part of significant information is omitted; some boilerplate phrases are retained; some significant physical characteristics are overlooked.	A significant amount of information is omitted; many boilerplate phrases are retained; no significant physical characteristics are noted.	The abstract is missing.
DW5. Adequacy of citation Standards 1–6, 32	A complete and accurate citation is provided.	A citation is provided but is inaccurate or incomplete.	No citation is provided.	The work sample is missing.
DW6. Analysis of reliability Standards 35–39, 44	All characteristics and evidence indicating reliability, credibility, and accuracy of information are correctly appraised, including puzzling information or inconsistencies.	A few characteristics or evidence indicating credibility, reliability, and accuracy are poorly appraised or not considered.	Many characteristics or evidence indicating credibility, reliability, and accuracy are poorly appraised or not considered or the analysis of reliability is missing.	The work sample includes no analysis of any type.
DW7. Analysis of background context Standards 12, 24, 41	Analysis of the document’s background considers all significant geographic, political, legal, and historical factors, and recognizes phrases, terms, and other characteristics of the record common to the area, time period, or record type.	Analysis of the document’s background overlooks a few relevant geographic, political, legal, or historical factors, or shows unfamiliarity with a few relevant phrases, terms, or other record characteristics.	Analysis of the document’s background overlooks many relevant geographic, political, legal, or historical factors, or shows unfamiliarity with many relevant phrases, terms, or other record characteristics, or the analysis of background context is missing.	The work sample includes no analysis of any type.
DW8. Single research question Standard 10	The research question about a person in the document concerns identity, relationship, or events. It is sufficiently broad to be answerable with relevant evidence and sufficiently focused to be tested against the Genealogical Proof Standard.	The research question does not concern identity, relationship, or events; or is overly broad or too narrowly focused to be tested against the Genealogical Proof Standard; or multiple questions limit effective research planning.	The research question is vague or undefined; or does not concern identity, relationship, or events; or poses an unanswerable question.	The work sample includes no research question of any type.
DW9. Analysis of information relevance and soundness of presumptions Standards 42, 45	The analysis identifies all significant information in the document relevant to the research question specified in requirement 3-E; all presumptions are valid.	The analysis overlooks a few significant items of information relevant to the research question; or a presumption is unsound.	The analysis overlooks much relevant information in the document; or several presumptions are unsound; or the analysis of information relevance is missing.	The work sample includes no analysis of any type.
DW10. Analysis of evidence Standards 40, 43	The analysis recognizes all direct, indirect and negative evidence relevant to the research question specified in requirement 3-E.	The analysis overlooks some direct, indirect and negative evidence relevant to the research question.	The analysis overlooks much direct, indirect and negative evidence relevant to the research question or the analysis of evidence is missing.	The work sample includes no analysis of any type.

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DW11. Efficiency of research plan Standards 1, 9, 11–16	The research plan identifies logical sources and efficiently prioritizes first steps for the discovery of evidence that will help answer the research question; and all sources in the plan are fully identified.	The research plan omits or gives low priority to a logical first step; it proposes a redundant, irrelevant or likely unproductive step; or some sources mentioned in the plan are not fully identified.	The research plan omits or gives low priority to several logical first steps; the steps are mostly redundant, irrelevant or likely unproductive; or many sources mentioned in the plan are not fully identified.	The research plan is missing.
Requirement 4—Kinship-Determination Project—Descending Narrative Lineage				
KD1. Extent of research Standards 12, 14, 17, 19, 41, 58 (bullets 1–2); and if DNA is used, Standards 51 and 53	The research underlying all parent-child relationships in the project is appropriately broad for reliable kinship determination; it reaches beyond the person or sources of most-direct impact in search of information that might illuminate or challenge other findings, and it covers all potentially relevant sources appropriate for each circumstance.	The research underlying one kinship determination is not appropriately broadened beyond one person or a few sources; or it overlooks a relevant jurisdiction, or a potentially relevant source appropriate for the circumstance.	The research underlying two or more kinship determinations in the project is not appropriately broadened beyond a few sources; or it overlooks several jurisdictions, or two or more potentially relevant sources appropriate for the circumstance.	The kinship-determination project is missing.
KD2. Adequacy of source citations Standards 1–8, 22, 62	Sources are cited fully and consistently, following recommended standards; lapses of any kind are few in number and generally minor in consequence.	Key citations or important details are sometimes missing or inaccurate; or the format or style has numerous inconsistencies.	Many citations are missing, incomplete or inaccurate; or the format or style has little or no consistency.	The kinship-determination project is missing.
KD3. Quality of evidence Standards 35–39; 44; 58 (bullet 3)	Evidence is drawn from reliable sources and information, and the use of any weak evidence is logically defended.	Some evidence is drawn from reliable sources and information, but the high credibility of several items is not recognized, or a few items of low credibility are used without justification.	Much evidence is drawn from unreliable sources and information without any justification.	The kinship-determination project is missing.
KD4. Correlation and assembly of evidence Standards 40, 42–43, 45–47, 60–61, 64–66; and if DNA is used, Standards 52, 54, and 55	The most significant connections and contradictions in evidence pertaining to kinship determinations are presented; and any conflicting evidence is presented fully and accurately.	A few significant connections and contradictions in evidence are overlooked.	Many points of agreement or disagreement in evidence are not acknowledged; or the conclusion is based on one source, so no correlation is involved; or contradictory evidence is omitted or presented inaccurately.	The kinship-determination project is missing.
KD5. Resolution of conflicting evidence Standard 48	Conflict resolutions are logical.	Conflict resolutions are plausible but not fully clear or persuasive.	Conflicting evidence is left unresolved; or most conflict resolutions are illogical, unclear, or unconvincing.	The kinship-determination project is missing. NOT APPLICABLE No conflicting evidence.

Rubrics for Evaluating New Applications for BCG Certification – Part 1
Revised 1 July 2025

Page 4

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KD6. Soundness of conclusions Standards 49–50, 59; and if applicable, Standard 56	All kinship determinations are consistent with reliable and sufficient evidence.	A kinship determination is partially inconsistent with relevant evidence, or rests on only partially reliable or only partially sufficient evidence.	Two or more kinship determinations are not consistent with relevant evidence, or rest on unreliable or insufficient evidence.	The kinship-determination project is missing.
KD7. Clarity of writing Standards 67–71	Writing throughout the project is clear, organized, and largely free from grammar, spelling, punctuation, and typographical errors.	Writing throughout the project is sometimes unclear or disorganized or has occasional grammar, spelling, punctuation, or typographical errors.	Writing throughout the project is frequently confusing or disorganized or has many grammar, spelling, punctuation, or typographical errors.	The kinship-determination project is missing.
KD8. Biographical information Standard 73	Biographical information places all couples in the project in their respective historical, community, religious, and economic contexts.	Biographical information for some couples in the project is superficial or missing.	Biographical information for all couples in the project is superficial or missing.	The kinship-determination project is missing.
KD9. Format Standard 72	The project closely follows a format for descending lineages that is generally accepted in the field; any deviations or inconsistencies are few in number.	The project follows a generally accepted format but contains many deviations or inconsistencies.	The project uses a format for lineages that is not generally accepted in the field.	The kinship-determination project is missing.
KD10. Respect for privacy If DNA is used, Code of Ethics, “To protect people who provide DNA,” bullet 2	The project confirms written permission from <i>all</i> living owners of DNA match lists referenced in the project.	The project confirms permission from <i>most</i> living owners of DNA match lists referenced in the project.	The project omits confirmation of permission from <i>most</i> living owners of DNA match lists referenced in the project.	NOT APPLICABLE
	See code as revised at <i>Board for Certification of Genealogists</i> > Ethics and Standards > Genealogist’s Code of Ethics (https://bcgcertification.org/ethics-standards/code/).			

Overall Evaluation		
Overall evaluation	SUFFICIENT TO PROCEED TO PART 2	INSUFFICIENT TO PROCEED TO PART 2
	The applicant’s work samples demonstrate most documenting, research, and writing standards, and any partially met or unmet standards are easily remediable.	The applicant’s work samples do not demonstrate most documenting, research, and writing standards; <i>or</i> the applicant’s work samples demonstrate most standards, but at least one partially met or unmet standard is not easily remediable; <i>or</i> the applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate many indicators.