

Rubrics for Evaluating New Applications for BCG Certification—Part 2
Revised 1 July 2025. Updated 19 October 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 6—Research Report Prepared for Another Person				
RR1. Focus and responsiveness Standards 10 and 74 (bullets 3–5 and 9)	The research question or questions are clearly defined and effectively focused, and the report either fulfills the recipient’s authorization and instructions, or explains why it was not possible.	Some part of the research question or questions is partially unclear or partially unfocused; or the recipient’s authorization or instructions are left partially unfulfilled without explanation.	The research question or questions are unclear or ineffectively focused; or the recipient’s authorization and instructions are left largely unfulfilled without explanation; or the authorization is unclear or not established in advance.	The work sample is not accompanied by a copy of the client’s instructions.
RR2. Extent and efficiency of research Standards 9, 11–18, 19, 41, 58 (bullets 1–2); and if DNA is used, Standards 51 and 53	Research covered sources potentially relevant to the problem and extended to those that might illuminate or challenge other findings in the time allowed; and it proceeded in a logical sequence; and efficient steps were proposed for any continuing investigation.	Research bypassed or gave low priority to a potentially relevant source or overlooked a few sources that might illuminate or challenge other findings in the time allowed; or it included a few redundant or irrelevant steps; or similar problems affected plans for any continuing investigation.	The research bypassed two or more potentially relevant sources that could have been consulted in the time allowed; or it mostly consisted of poorly prioritized, redundant or irrelevant steps; or similar problems affected plans for any continuing investigation.	The report meets most standards but its scope is too narrow to meet the application guide requirement for “in-depth and skillful use of a range of sources.”
RR3. Adequacy of source citations Standards 1–7, 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 report is missing.
RR4. Adequacy of starting-point information Standard 74 (bullet 2)	A clear summary of earlier research or previously known information informs the recipient of the investigation’s starting point.	Earlier research or previously known information is not recapitulated completely or accurately enough to easily remind the recipient of the starting point.	Earlier research or previously known information is not recapitulated at all.	The report is missing.
RR5. Comprehensive-ness and accuracy of reported findings Standards 23–27, 74 (bullets 7–8)	Positive and negative findings are reported accurately and in sufficient detail to avoid repetition of the same searches later; and contents of records and comments about them are clearly distinguished.	Positive and negative findings are reported with occasional lapses in accuracy or detail; or contents of records and comments about them are sometimes indistinguishable.	Many positive or negative findings are not accurately or fully reported; or contents of records and comments about them are mostly indistinguishable.	The report is missing.

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Page 2

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
RR6. 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 report meets most standards but its scope is too narrow to meet the application guide requirement for “in-depth and skillful use of a range of sources.”
RR7. 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 are presented.	A few significant connections or contradictions in evidence are overlooked.	Many points of agreement or disagreement in evidence from multiple sources are not acknowledged; or the conclusion is based on one source, so no correlation of evidence is involved.	The report meets most standards but its scope is too narrow to meet the application guide requirement for “in-depth and skillful use of a range of sources.”
RR8. Resolution of conflicting evidence Standard 48	Conflict resolutions are logical; and additional research to address any unresolved conflicts is proposed.	Conflict resolutions are plausible but not fully clear or persuasive.	Most conflict resolutions are illogical, unclear, or unconvincing; or conflicting evidence is left unresolved and additional research to address unresolved conflicts is not proposed.	The report meets most standards but its scope is too narrow to meet the application guide requirement for “in-depth and skillful use of a range of sources.” NOT APPLICABLE No conflicting evidence.
RR9. Soundness of conclusions Standards 49–50, 59; and if applicable, Standard 56	All final and intermediate conclusions are consistent with reliable and sufficient evidence.	A final or intermediate conclusion is partially inconsistent with relevant evidence; or a conclusion rests on only partially reliable or only partially sufficient evidence.	A final conclusion or many intermediate conclusions are not consistent with relevant evidence; or a conclusion rests on unreliable or insufficient evidence.	The report meets most standards but its scope is too narrow to meet the application guide requirement for “in-depth and skillful use of a range of sources.”
RR10. Clarity of report Standards 67–70, 74 (bullet 1)	The report’s format and sequence are easy to follow; and the writing throughout is clear, and largely free from grammar, spelling, punctuation, and typographical errors.	The report’s format or sequence is occasionally hard to follow; or writing throughout is sometimes unclear or disorganized or has occasional grammar, spelling, punctuation, or typographical errors.	The report’s format or sequence is confusing; or writing throughout is frequently confusing or disorganized or has many grammar, spelling, punctuation, or typographical errors.	The report is missing.
RR11. Document images and separation safeguards Standards 8, 28, 71, 74 (bullet 10)	All document images exactly reproduce the entire item of interest; each one bears a complete source citation and is cross-referenced in the report; and safeguards protect other report parts from separation or loss.	All document images exactly reproduce the entire item of interest; a few images lack a complete source citation or are not cross-referenced in the report; or safeguards do not protect other report parts from separation or loss.	Several document images exclude part of the item of interest, or one or more appear to have been inappropriately altered; or many images lack complete source citations.	The report is missing. NOT APPLICABLE Document images were not supplied to the client.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
RR12. Respect for privacy Code of Ethics, “To protect the client,” bullet 10; and if DNA is used, Code of Ethics, “To protect people who provide DNA,” bullet 2	The report includes written permission from the client to use for certification and confirms permission from all living owners of DNA match lists referenced in the report.	The report includes required written permission or confirmation from <i>most</i> of the following individuals: (1) the client and (2) living owners of DNA match lists referenced in the report.	The report omits required written permission or confirmation from <i>many</i> of the following individuals: (1) the client and (2) living owners of DNA match lists referenced in the report.	The report is missing.
	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/).			
Requirement 7—Case Study: Conflicting, Indirect, or Negative Evidence				
CS1. Extent of research Standards 12, 14, 17, 19, 41, 58 (bullets 1–2); and if DNA is used, Standards 51 and 53	The research is broadened beyond the person of interest to include family members or associates or same-surname individuals to a degree necessary for the problem; it extends to sources that might illuminate or challenge other findings; and it covers all relevant jurisdictions and all potentially relevant sources appropriate for the research question.	The research extends beyond the person of greatest interest but overlooks some relevant individuals, disregards some sources that might illuminate or challenge other findings, or bypasses a relevant jurisdiction or a potentially relevant source appropriate for the problem.	The research focuses largely on one person; or it disregards many sources that might illuminate or challenge other findings; or it overlooks several relevant jurisdictions or two or more potentially relevant sources appropriate for the problem.	The case study meets most standards but does not fulfill the application guide requirement for a significant problem of relationship that cannot be solved with uncontested direct evidence.
CS2. 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 case study is missing.
CS3. 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 case study meets most standards but does not fulfill the application guide requirement for a significant problem of relationship that cannot be solved with uncontested direct evidence.
CS4. 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 are presented; and any conflicting evidence is presented fully and accurately.	A few significant connections or 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 case study meets most standards but does not fulfill the application guide requirement for a significant problem of relationship that cannot be solved with uncontested direct evidence.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
CS5. 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 case study meets most standards but does not fulfill the application guide requirement for a significant problem of relationship that cannot be solved with uncontested direct evidence.
				NOT APPLICABLE No conflicting evidence.
CS6. Soundness of conclusions Standards 49–50, 59; and if applicable, Standard 56	The final conclusion and all intermediate conclusions are consistent with reliable and sufficient evidence.	The final conclusion or an intermediate conclusion is partially inconsistent with relevant evidence; or a conclusion rests on only partially reliable or only partially sufficient evidence.	The final conclusion or many intermediate conclusions are not consistent with relevant evidence; or a conclusion is based on unreliable or insufficient evidence.	The case study meets most standards but does not fulfill the application guide requirement for a significant problem of relationship that cannot be solved with uncontested direct evidence.
CS7. 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 case study is missing.
CS8. Respect for privacy If DNA is used, Code of Ethics, “To protect people who provide DNA,” bullet 2	The case study includes confirmation of permission from all living owners of DNA match lists referenced in the case study.	The case study includes confirmation of permission from <i>most</i> living owners of DNA match lists referenced in the case study.	The case study omits confirmation of permission from <i>many</i> living owners of DNA match lists referenced in the case study.	NOT APPLICABLE The case study does not include living owners of DNA match lists or the study does not use DNA
	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 FOR CERTIFICATION	INSUFFICIENT FOR CERTIFICATION
	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.