



# The BCG Application Guide

2021

Board for Certification of Genealogists  
*Promoting quality in genealogy since 1964*

# The BCG Application Guide

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Post Office Box 14291  
Washington, DC 20044  
[www.BCGcertification.org](http://www.BCGcertification.org)  
[office@BCGcertification.org](mailto:office@BCGcertification.org)





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# Introduction

## Certification

Certification is extended by the Board for Certification of Genealogists to applicants who successfully demonstrate their ability to meet research and ethical standards. Credentials are available for two certification categories: a core research category and an optional teaching category. Certification in the research category attests to the competence of an individual's research, analysis, kinship determination, and reporting skills. All Board associates are certified in this category. The teaching credential is an option pursued by associates who lecture and wish validation of those specialized skills.

Certified Genealogist, the board's research credential, is a registered trademark. The category short form (initials)—CG—is also a registered trademark. Certified Genealogical Lecturer, the board's teaching credential, and its short form CGL are service marks. Individuals who have earned one or both credentials include genealogists who engage in genealogy for a living as well as family historians who value certification for personal reasons.

All Board-certified genealogists, including trustees, officers, and judges, are required to submit renewal applications at five-year intervals. This reevaluation ensures that their skills are current and that the work they produce for clients, family members, readers, or audiences maintains the quality expected of modern genealogists.

## Essential Materials

Two Board publications are essential for individuals who seek certification. They are this guide and *Genealogy Standards*.<sup>1</sup> The guide explains the application process and sets out the requirements applicants must fulfill to demonstrate their skills. *Genealogy Standards* describes the standards against which work is measured. First codified by BCG in 2000 and revised in 2014 and 2019, the standards are widely accepted criteria for sound genealogical research.

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<sup>1</sup> Board for Certification of Genealogists, *Genealogy Standards*, second edition revised (Nashville, Tennessee: Ancestry.com, 2021).



# Research- Category Application

## The Application Process

Applying for the research-category certification is a two-step process. The first step is to file a preliminary application; the second is to submit a final application accompanied by a portfolio of materials that demonstrates your expertise.

### **Preliminary Application**

Complete a Preliminary Application Form indicating the geographic area and time period in which you normally work or are particularly interested. Also specify any languages other than English that you use in your work. BCG will use this information to select the document you will need to fulfill Requirement 3. This specified area, time period, and language apply to the document work only. Return the completed form to the office along with your payment of the preliminary application fee. The executive director will then send you an application package.

### **Final Application**

The package you receive in response to your preliminary application includes (a) a Category Application Form, (b) a digital image of a historical document corresponding with the interest you specified on your preliminary application, and (c) a copy of the Genealogist's Code of Ethics. You will also need the current edition of *Genealogy Standards*.

#### *Completing the Category Application Form*

Fill out the form and scan it and upload it with your completed portfolio. The final application fee is due when the portfolio is submitted. All portfolios will be screened before being accepted for evaluation. Incomplete submissions and those with many severe problems will not be eval-



uated. If your portfolio is not evaluated, the final application fee will be refunded minus a small processing fee for electronic payments.

#### *Demonstrating Your Skills*

BCG's research-category requirements test skills in these areas:

- understanding research sources and methods
- planning, executing, and reporting the results of research
- citing sources
- evaluating evidence
- proving kinship
- resolving genealogical problems

#### *Selecting Your Materials*

Your work samples must meet the criteria specified in this guide. They must also demonstrate your ability to meet the standards articulated in *Genealogy Standards* and the ethical provisions outlined in the Genealogist's Code of Ethics.

#### *Portfolio Size*

Final applications from initial applicants must be no more than 150 pages. Permission included from clients and owners of DNA match lists will not be included in the overall page count. (Portfolio limits for renewing applicants are described on page 15.)

#### *Submitting an Electronic Portfolio*

Applicants must submit their portfolio electronically. This involves uploading files to a secure server. Textual materials must first be converted to PDF format. The BCG office will send detailed instructions with your application packet. Scanning of paper portfolios is available from the BCG office for an extra fee. However, applicants can produce better quality images themselves by saving their work samples as PDF files.

#### *Meeting the Deadline*

Your final application portfolio is due before the end of one year—measured from the date you sign your Preliminary Application Form.

### Getting Help

BCG supports applicants with numerous resources including *OnBoard*, an educational newsletter, and ACTION, a private online group where preliminary applicants can ask questions about the certification process. See Appendix B, Getting Help, for a comprehensive listing and details of these resources. Information on where to find examples of the requirements is included.

## Requirements: CG Applications

Each of BCG's requirements is designed to test specific skills. To allow for a complete evaluation of your abilities, follow the instructions for each requirement carefully. To ensure your portfolio exhibits the expected qualities, adhere closely to the standards outlined in *Genealogy Standards*. The work you submit will be measured against those standards. The standards applicable to each requirement are identified throughout these instructions.

### *Requirement restrictions*

No material in an initial application may have been reviewed, critiqued, or proofread by another individual. This restriction rules out submission of published work, although an original unedited manuscript of a published work *is* acceptable if the work meets all of the criteria for a requirement. This restriction also means work from an unsuccessful application may not be re-used in subsequent portfolios.

Successful portfolios reflect diversity; therefore, an individual named in a document or work sample must not appear in any other work sample in your application.

### *DNA Evidence*

DNA evidence is not required for new applicant or renewal portfolios. The 2019 edition of *Genealogy Standards* includes seven standards for using DNA evidence. BCG recognizes that DNA is not always available, relevant, or usable for a specific problem. While DNA is required to establish a genetic relationship,<sup>2</sup> the use of DNA is not required for every research question or in every research context. Articles in peer-reviewed journals provide many examples of problems that are resolved with and without the use of DNA evidence. If DNA evidence is used in a portfolio it must meet standards for using DNA evidence (Standards 51–56) as well as all other applicable standards. For more guidance on meeting Standards 51–56, see “DNA Resources” on BCG’s website.

A complete research-category portfolio will include the following materials:

## 1 **Genealogist’s Code of Ethics**

*Sign and date the copy of the Genealogist’s Code of Ethics* that is printed on the back of the Category Application Form. (See also Appendix A.) You must honor any applicable provisions of the code during preparation of your portfolio.

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<sup>2</sup> For “genetic relationship,” see *Genealogy Standards* (2019), 79.

## 2 Development Activities

*Activities.* List the genealogy-related activities that helped you prepare for certification and in a sentence or two discuss how each activity helped you improve your (a) attainment of genealogical standards, (b) knowledge of genealogically useful materials and contexts, (c) skills in reconstructing unknown or forgotten relationships, families, people, groups, and events, and (d) abilities to present your findings to others. Your discussion should cover formal and informal development activities in which you engaged. {Standards 89–90}

## 3 Document Work (BCG-Supplied Document)

The document BCG will send you for this requirement (and that you will return with your portfolio) will represent the geographic area, time period, and language you specified on your Preliminary Application Form. The document will be typical of records you might encounter in your work and, therefore, may contain irregularities such as faded or illegible text, or incomplete or missing citations.

Five treatments of the document are required.

### 3-A *Submit a transcription of the document.* {Standards 1–6, 23–24, 29, 32}

If your preliminary application stated an intention to work in a language other than English, the BCG-supplied document will likely be in that language. Your transcription must be in that language as well. *Include also a translation into standard English* and continue in English with the rest of the requirements.

### 3-B *Submit an abstract of the document.* {Standards 1–6, 23–24, 30, 31, 32}

### 3-C *Submit a statement identifying a single research question.* The document mentions several people, and it states or implies events or circumstances related to them. Using that information, propose (in a sentence or two) a research question that identifies (a) who in the document you would envision researching and (b) what you would hope to find out about him, her, or them by pursuing the search further. {Standard 10}

### 3-D *Submit an analysis* of the data in the document related to the research question you proposed in item 3-C. The analysis should discuss the document’s reliability, including source and information quality; background context; information in the document relevant to the research question; and evidence in the document relevant to the research question. {Standards 35–45}

### 3-E *Submit a research plan* (one page or less) describing the *first* steps for continuing research to resolve the question defined in 3-C. {Standards 9–16} You must

- base the plan on clues found within the document and on sound research methods, standard genealogical sources, and materials specific to the area, time period, and subject of *this* record; and
- identify fully any publications, personnel, repositories, or records (original, in print, or electronic) you would normally consult in following that plan.

#### 4 Research Report Prepared for Another Person

*Submit one report* prepared for another person that represents authorized research about a genealogical problem. The report must demonstrate *in-depth and skillful use of a range of sources*. It must include analysis of the problem, a detailed account of findings, and recommendations for further work if the problem is not resolved.

Do not submit genealogies, biographical narratives, case studies, lineage-society applications, or other commissioned projects for this part of your portfolio. The requirement is not for *any* type of commissioned work; it is for a *report* that describes the research performed during a commissioned investigation.

The research report must

- use a family other than your own or your spouse's;
- be written for and actually sent to the person who commissioned the work, regardless of whether the work was *pro bono* (unpaid) or done for an agreed-upon sum, hourly fee, salary, or research-time exchange; and
- be submitted *exactly* as it was sent to the person or agency that authorized the work. This instruction applies to the report's content and layout and means you must not re-research the problem, alter the documentation, or reformat the report before sending it to the Board. The instruction does *not* apply to the medium chosen for submission, i.e. a report sent to a client on paper may be submitted to BCG electronically.

**Note:** If you are not working for paying clients, *pro bono* authorizations can be solicited from friends, neighbors, or correspondents. You might also undertake research for a library user, courthouse patron, or society member whose inquiry requires in-depth research.

The report must meet documentation standards 1–8, research standards 9–50, and writing standards 58–74. Standard 74 describes unique report characteristics. If your report includes DNA evidence it must also meet Standards 51–56.

Include *your conclusions* about whether the research objective was reached—regardless of whether the underlying genealogical problem was solved. (BCG rec-

ognizes some problems cannot be solved and others require more extensive work than can be completed in the time authorized by the commissioning individual.)

- 4-A** *Submit copies of all photocopies or other document images* that accompanied the original report, exactly as they were sent with the report. {Standards 1–6, 8, 28}
- 4-B** *Submit the commissioning individual’s authorization letter, e-mail, or a signed contract* describing the nature of the project you were to undertake and specifying the limitations on your time, travel, and expense. {Standard 74, third, fourth and fifth bullets}
- 4-C** *Submit the commissioning individual’s written permission* for the report’s use in your portfolio. Because the commissioning individual has a proprietary interest in the report, BCG requires inclusion of a specific “permission to use” notice for all such work submitted in a portfolio. A contract that provides blanket permission to reuse work for teaching and peer-review is acceptable in lieu of a special letter. {Genealogist’s Code of Ethics, Appendix A.}

## 5 Case Study: Conflicting, Indirect or Negative Evidence

*Supply a case study (proof argument)* drawn from your own research that (a) demonstrates application of the Genealogical Proof Standard and (b) resolves, in your opinion, a significant problem of *relationship* or *identity*<sup>3</sup> that cannot be resolved from uncontested direct evidence.

- Your chosen problem may relate to your own family or a client’s.
- Your presentation must use one of the following techniques:
  - (a) assembling *indirect* or *negative* evidence, or a combination of the two
  - (b) resolving a conflict between two or more items of *direct* evidence
  - (c) resolving conflict between *direct* evidence and *indirect* or *negative* evidence
- Supply for your case study a title or label that indicates your choice of technique (a), (b), or (c) above.
- Your discussion must
  - (a) describe the problem;
  - (b) present your evidence, both supporting and contradictory, with full source citations; and
  - (c) state your conclusion and reasons for accepting it as persuasive.

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<sup>3</sup> An identity problem typically involves distinguishing between same-named people. It does not mean you can submit a study about a single identifying characteristic of a person such as their date or place of birth.

The Genealogical Proof Standard, which your case study is expected to meet, is described on pages 1–3 of *Genealogy Standards*. Your case study must also conform to documentation standards 1–8, writing standards 58–71, and the evidence-reasoning standards applicable to your choice of technique. If your case study includes DNA evidence it must also meet Standards 51–56.

Copies of the documents used for your case study are not required for evaluation purposes and need only be included in the rare instance that select images are necessary to illustrate a point. The basis for your conclusions should otherwise be set out in the body of the work in conformance with the genealogical standards mentioned above.

## 6 Kinship-Determination Project

*Submit a narrative genealogy, narrative lineage, or narrative pedigree* that documents and explains linkages among individuals through three ancestral generations—ascending or descending. Your project is expected to meet the Genealogical Proof Standard. Use a documented proof statement, proof summary, or proof argument, as appropriate, to establish each relationship. Include proof summaries or arguments justifying your kinship conclusions for at least two parent-child relationships in different generations.

This project may use your own family but may not include you or your siblings.

Whether you submit a genealogy, lineage, or pedigree, your project overall must demonstrate the following scope and qualities:

- sufficiently broad research to ensure evidence is adequately tested {Standards 12, 14, 17, 19, 41 and 58}
- accurate placement of each individual within the family {Standards 37–50}
- descriptive biographical information for each couple in the genealogy, lineage, or pedigree {Standard 73}
- documentation of every statement of fact that is not common knowledge {Standards 1–8}
- names and vital data of the children of each couple in the genealogy, lineage, or pedigree
- a clear, comprehensive format that follows the appropriate style—i.e., *NGS Quarterly*, *Register*, or Sosa-Stradonitz systems {Standard 72}

Your project must include at least two proof summaries, two proof arguments, or one of each. Each proof must conform with standards for reasoning from evidence 37–50 and standards for genealogical proofs 58–61. If your project includes DNA

evidence it must also meet Standards 51–56.

In addition to the previously mentioned standards, the entire project must also adhere to Standards 62–71.

Copies of the documents used for your kinship-determination project are not required for evaluation purposes and need only be included in the rare instance that select images are necessary to illustrate a point. The basis for your conclusions should otherwise be set out in the body of the work in conformance with the genealogical standards mentioned above.

For more help with this and other requirements, see Appendix B, Getting Help, on pages 27–29 of this guide.

**If your portfolio now includes responses to Requirements 1 through 6, you have completed your research-category application.**

# Teaching- Category Application

## The Application Process

BCG's teaching category of *Certified Genealogical Lecturer* denotes associates who deliver oral presentations about genealogical subjects, including sources, methods, and standards. The category is open to all associates once they attain certification in the research category.

### The Application Form

On the Category Application Form, *identify when your research-category certification was first earned or, if applicable, last renewed*. Fill out the rest of the *top section of the form* and return it with your portfolio and fee payment to the BCG office.

Your teaching certification will expire at the same time as your research certification. You should therefore time your CGL application to maximize the length of time between its approval and the next renewal of your CG certification. However, if you have not yet qualified for the research category, you must do so *before* applying to the teaching category. You may not apply for the two categories simultaneously.

### Demonstrating Your Skills

BCG's teaching-category requirements test your skills in the following areas:

- selecting and organizing lecture contents
- providing accurate and effective presentations
- using written and visual learning aids



## Presenting and Submitting Your Materials

Instructions regarding acceptable formats for audio and other materials are included below. If you communicate only in American Sign Language or wish your submission to reflect the fact that you teach the deaf, please contact the BCG office to make special arrangements regarding the format of your submission.

All portfolios must be submitted electronically, contact the BCG office for detailed instructions. The final application fee is due when the portfolio is submitted.

### Requirements: CGL Applications

#### 1 Background Résumé

The following items will provide information about you and your activities.

- 1-A** *Summarize your lecturing activities*, particularly those related to genealogical study. If you wish, you may provide samples of advertisements or brochures for your genealogy-related lectures.
- 1-B** *List the genealogical topics* you feel competent to address. You may also include the lecture *titles* if you wish.

#### 2 Recorded Lectures

*Submit digital recordings of two lectures* you have presented, each of which meets Standards 81–82, 85–86, and the following criteria:

- The lecture was at least fifty minutes long but no longer than seventy-five minutes.
- It directly relates to genealogical sources, methods, and/or standards.
- It was recorded before a live audience, or the recording was subsequently presented to a live audience. The live audience may have been addressed at a conference or by means of a webinar. If someone other than yourself edited the recording before delivery, submit a pre-edited version.

Submit your recordings in digital format. Digital recordings must be in a standard format such as WAV, MP3, MP4, or MKV. Please specify the size of your digital files. A link to a Legacy Family Tree webinar may also be used but if the

recording is inaccessible for any reason (transient internet failure, storage site failure, file relocation at the storage site, and others) this may cause delays in evaluating the portfolio. Links to lectures at other websites are not permitted.

**2-A** *Submit a copy of the script, outline, or speaking notes* you used for the presentation.

**2-B** *Submit a copy of your handout or syllabus material.* {Standards 83–84, 86}

**2-C** *Submit copies* of your visual aids or computer-programmed projections.

- If you use a chalk- or white-board for illustrative writings or drawings during the session, reproduce them digitally for inclusion in your application portfolio.

To ensure evaluation can proceed even if there are technical difficulties, please supply one copy of your visuals as a PDF file. You may also submit a copy of your slides as created in PowerPoint or other presentation software.

**2-D** *Submit a list* of materials (books, periodicals, websites, recordings, and so forth) you recommend for further study of the topic. {Standard 84}

- If this kind of list is included in the handout or syllabus material, omit a response to this requirement.
- If the handout or syllabus was abbreviated or omitted to conform to limits imposed by the sponsor, include a supplemental bibliography in your response to this requirement.

**If your portfolio now includes responses to Items 1-A through 2-D of this section, you have completed your teaching-category application.**



# Renewal Applications

## The Renewal Process

To ensure that the work of certified individuals continues to meet acceptable standards, BCG obliges all its associates to apply for renewal at five-year intervals.

Your certification expires on the fifth anniversary of your initial certification. Your renewal portfolio is due *before* that date. You may continue to use your credential while you await the evaluation results.

### Early Preparation for Renewal

Genealogists who enjoy success at renewal begin preparation as soon as they are certified. You might wish to follow this two-step process:

- First, as soon as you receive the judges' evaluations, begin to remedy any shortcomings they pointed out, particularly any noted as serious. Doing so will ensure that *all* the work you produce while you are certified will be suitable for inclusion in your renewal portfolio.
- Second, open a "Renewal" file. Keep in it documentation of your genealogical and continuing education activities. When you complete a report, lecture, case study, or other work product of which you are proud, place a copy of it in this file. As your renewal deadline approaches, the materials you need for your application will be at hand. Selecting representative samples from a group of your best is surer and easier than revisiting an entire five-year body of good work.

## The Application Form

At least half a year before your renewal portfolio is due, the executive director will send you a Category Application Form and instructions for uploading an electronic portfolio. Please notify the office if you have not received these items six months before your certification expires.

*Note:* If exceptional circumstances will prevent you from meeting the deadline, please contact the executive director for instructions as soon as you realize your certification will lapse before you can renew it. If your certification lapses, you will lose the right to use your credential until you submit your portfolio and the evaluation is complete. Associates are allowed a one-year grace period to submit a renewal application after their credential expires.

*If you hold certification in a single category*, check the “Renewal” box and complete the rest of the *top part* of the form. Submit it with your renewal portfolio and renewal fee.

*If you hold dual certification* (research category and teaching category) and wish to renew both, check the boxes for both “Renewal” and “Simultaneous” on the Category Application Form and include payment for *both* renewal fees.

## Meeting the Standards

Refer to the current edition of *Genealogy Standards* for the qualities your renewal judges will look for in your work samples. As Board standards keep pace with accepted practices in the field, changes in standards—those made between manual editions—are published in the Board’s newsletter, *OnBoard*.

If standards advanced significantly during your five-year certification period, do not revise your work samples to reflect the change. Attach a note to let the judges know that you recognize the advances but also include at least one recent work sample that reflects them.

## Submitting Your Materials

Renewal portfolios must be submitted in electronic format following the instructions for preparing and uploading electronic portfolios supplied to you by the BCG office. Scanning of paper portfolios is available from the BCG office for an extra fee. However, applicants can produce better quality images themselves by saving their work samples as PDF files.

### Portfolio size

Renewal portfolios must be no more than 100 pages. Permission included from clients and owners of DNA match lists will not be included in the overall page count.

### DNA evidence

DNA evidence is not required for renewal portfolios. The 2019 edition of *Genealogy Standards* includes seven standards for using DNA evidence. BCG recognizes that DNA is not always available, relevant, or usable for a specific problem. While DNA is required to establish a genetic relationship,<sup>4</sup> the use of DNA is not required for every research question or in every research context. Articles in peer-reviewed journals provide many examples of problems that are resolved with and without the use of DNA evidence. If DNA evidence is used in a portfolio it must meet standards for using DNA evidence (Standards 51–57) as well as all other applicable standards. For more guidance on meeting Standards 51–57 see “DNA Resources” on BCG’s website.

## Requirements: Renewal Applications

In your initial portfolio, you demonstrated your knowledge of standards and ability to work to

them. Your renewal portfolio should similarly reflect sound knowledge of and adherence to genealogical standards. It should also show your ability to improve in weak areas and to keep pace with developments in the field. See “Standards for Continuing Education” in *Genealogy Standards*.

The portfolio you submit must contain the following materials:

### 1 Genealogist’s Code of Ethics

A current copy of the Code of Ethics (included on the back of the Category Application Form) must be signed, dated, and uploaded with your portfolio.

### 2 Research-Category Renewal

- 2-A** *Development Activities.* List the genealogy-related activities that helped you prepare for certification and in a sentence or two discuss how each activity helped you improve your (a) attainment of genealogical standards, (b) knowledge of genealog-

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For “genetic relationship,” see *Genealogy Standards* (2019), 79.

ically useful materials and contexts, (c) skills in reconstructing unknown or forgotten relationships, families, people, groups, and events, and (d) abilities to present your findings to others. Your discussion should cover formal and informal development activities in which you engaged. The development activities requirement should describe the steps you took to remedy shortcomings noted in your previous evaluations. {Standards 89–90}

**2-B** *Work samples.* Include up to two samples of your genealogical work completed during the five-year period since your last evaluation. Submission of a work sample that includes the same deficiencies identified in a prior evaluation may be the basis for finding a portfolio insufficient for renewal. The best choices will involve research undertaken to prove identity and kinship, or set past lives in historical context. At least one work sample *must* meet the Genealogical Proof Standard. Case studies, kinship-determination projects and *some* research reports are good choices for a GPS work sample. The GPS work sample need not be complex.<sup>5</sup>

Clearly designate which of your work samples meet the GPS. GPS submissions should demonstrate your ability to meet all five GPS components, including resolution of conflicting evidence if it is present. The work will be evaluated against documentation standards, research standards, and the writing standards applicable to the type of work.

Published articles may be used and work samples may have been reviewed, critiqued, or proofread by another individual. If your submissions include significant work done by one or more other persons, identify them *and their specific contributions*. {Standard 22} If the work done by you is not clearly distinguishable from the work done by other individuals, the work sample must not be included in the portfolio.

Submit no more than two work samples. No more than two will be evaluated. If you submit two work samples, they may be the same type of work or they may be different. One work sample is defined as *one* example of a type of work. Two items of the same type (e.g., two articles) are two work samples.

The types of work you might consider are numerous and may be work done for yourself or work done for others. Suggestions include the following:

- Proof arguments written to record your conclusions about genealogical questions, especially those involving kinship or identity. Applicable standards include 1-8, 12, 14, 17, 19, 37–50, and 58–71. If your proof argument includes DNA evidence it must also meet Standards 51–57.
- Case studies written to demonstrate genealogical techniques. Applicable

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<sup>5</sup> Thomas W. Jones, “The Genealogical Proof Standard: How Simple Can It Be?” *OnBoard* 16 (September 2010):17–18, 20; “BCG Resources on Key Skills,” *Board for Certification of Genealogists* (<https://bcgcertification.org/skillbuilding-the-genealogical-proof-standard-how-simple-can-it-be/>).

standards include 1-8, 12, 14, 17, 19, 37–50, and 58–71. If your case study includes DNA evidence it must also meet Standards 51–57.

- Family histories, published or unpublished. These may be lineages, genealogies, or pedigrees. Include proof statements, proof summaries, or proof arguments, as appropriate, to establish each relationship. A submission may cover one generation or more. Applicable standards include 1–8, 12, 14, 17, 19, 37–50, and 58–73. If your family history includes DNA evidence it must also meet Standards 51–57.
- Research reports you prepared. Research reports prepared for clients seldom meet the GPS due to client-imposed restrictions such as time limits that prevent reasonably exhaustive research. Research reports prepared for your own files will often be a better choice. Applicable standards include 1–8, 12, 14, 17, 19, 37–50, 58–71, and 74. If your report includes DNA evidence it must also meet Standards 51–57. Research reports should also meet these requirements:
  - (a) If for your own files, submit any document images that you included as part of it.
  - (b) If for another person (a client, society member, or library or archive patron), submit the report exactly as it was sent and include copies of all accompanying document images, the commissioning individual's authorization and permission as described in research-category requirements 4-A, 4-B, and 4-C on pages 5–6 of this guide. If the report recipient required abbreviated citations for a specialized project, include their statement to that effect and attach full references in BCG-recommended format.

The following types of submissions are also appropriate for a renewal portfolio, although not for the GPS requirement.

- Lineage-society applications you researched and assembled, together with copies of the supporting documents that were attached. The limitations of society forms and requirements do not make these a good choice for the GPS requirement. Include a copy of the society's application instructions. If the society required abbreviated citations, attach a separate sheet with full references. If done for a client, include documents discussed in research-category requirements 4-A, 4-B, and 4-C. Applicable standards include 1–8, 12, 14, 17, 19, 37–50, 58–71, and 75. If your lineage-society application includes DNA evidence it must also meet Standards 51–57.
- Magazine, newspaper, newsletter, or internet articles about genealogical methods, sources or standards (not general news items). If an article was published without standard citations, attach a separate sheet with full references. Applicable standards: 1–8, 69–70, and 76 or 77.



- Longer works about genealogical methods, sources, or standards. These may be unpublished or published. If a work is too large to submit in full, submit a copy of the title page and a significant sample of the work. Applicable standards: 1–8, 69–70, and 76 or 77.
- Representative examples of transcription or abstracting projects. Copies of the original records must be included. Without copies of the originals, such projects cannot be evaluated. Applicable standards: 23, 29 and 32 for transcriptions, and 23–24, 30, and 32 for abstracts.
- Digital recordings of lectures, seminars, or workshops you presented that address methods, sources, or standards, along with a copy of the handout or syllabus material and a copy of your visual aids. For a lecture to be evaluated, *all* related materials must be submitted. Recordings, handouts, syllabus material, or slides will not be evaluated as standalone items. Acceptable formats for lecture materials are described in “Requirements: CGL Applications” on pages 10–11. Applicable standards: 81–88.

If you are applying for certification in the CGL category or renewing in that category, reserve lecture materials for that portfolio.

### 3 Teaching-Category Renewal

Because teaching-category certification requires concurrent certification in the research category, you may file the renewal applications simultaneously. To do so, check the “Simultaneous” box on the Category Application Form and include *both* renewal fees.

- 3-A** *Describe briefly*, in list or paragraph form, the lectures, seminars, or workshops you have presented during the past five years.
- 3-B** *Submit recordings* of two lectures presented by you in the last five years. Include (a) copies of related material (syllabus submission or handout, presentation outline or script, discussion notes, activities instruction, reading list, and so forth) and (b) copies of your visual aids. (For file format specifications, see section 2, *Recorded Lectures*, of the CGL requirements.)

**If your portfolio now includes responses to Items 1 through 2-B and, if applicable, items 3-A and 3-B, you have completed your renewal portfolio.**

# Evaluation & Approval of Applications

## The Evaluation Process

The Board grants certification upon recommendations made by its panel of judges. Initial applications are reviewed by at least three of those judges, each of whom is a BCG-certified genealogist with a well-earned reputation for excellence in the field. Each will evaluate your portfolio anonymously and independently of the others. All will be familiar with BCG's standards and the requirements for certification. Renewal applications are reviewed by at least two judges.

## The Judges' Responses

You will receive a report of each judge's evaluation of your portfolio's strengths and weaknesses. The evaluations have two parts: rubrics and remarks.

### *Rubrics*

The judges will use rubrics to determine if your work "meets standards," "partially meets standards," or "does not meet standards." The final recommendation of each ("sufficient" or "insufficient" for certification) will be based on whether the work meets most of the standards and the ease with which any unmet standards might be remediable. New application and renewal rubrics are posted at BCG's website for use by applicants when preparing their portfolios. Renewing associates may find the new application rubrics for research reports, case studies, and kinship-determination projects useful for self-evaluating work samples prior to submission. See [www.BCGcertification.org/process/rubrics/](http://www.BCGcertification.org/process/rubrics/)

*Remarks*

The evaluations you receive will include comments by the judges in text format. Judges will identify specific strengths or weaknesses in your work that justify their rubric selections.

*Recommendations*

New applications that receive unanimous decisions from all three judges are automatically approved or disapproved, as the case may be. If the judges' recommendations are not unanimous, your portfolio will be sent to an arbitration judge for further review and recommendation. Renewal applications that receive mixed recommendations shall be reviewed by a third judge before being sent to a fourth (or arbitration) judge.

**Notification**

The evaluation process normally takes five to six months. You will work hard to prepare your application—your judges will need time to give it the consideration it deserves. Because those who serve in this capacity are among the nation's most active genealogists, the most appropriate judges for your portfolio may not be immediately available for service. Consequently, your particular application may take a little longer than normal.

When the review process is complete, the executive director will notify you whether your application has been approved and will return your application portfolio along with copies of each judge's evaluation.

**After Approval****Roster Listing**

As a BCG associate, you will be entitled to have your name, contact details, research availability, and special interests listed on the Board's roster at [www.BCGcertification.org](http://www.BCGcertification.org). This data will be listed for the duration of your certification period as long as your annual maintenance fees are paid.

*Note:* Although your special interests were not specifically tested, the Board assumes you will list your abilities in the realistic fashion prescribed by the Genealogist's Code of Ethics. {Appendix A}

**Use of Credentials**

After approval you will also be entitled to proclaim your certified status by using your category designation or its short form (initials) after your name. You may use your credential on your website, work products, stationery,

business cards, and other materials. It is essential, however, that you do so appropriately. Certified Genealogist and CG are registered trademarks and CGL and Certified Genealogical Lecturer are service marks owned by the Board and used by associates under license. To help legally protect BCG's exclusive use of these marks, always observe these conditions for their use:

- Never use a category designation or its short form in a way that may be construed as generic. That means neither should be used as a freestanding noun preceded by the articles “a” or “the.” Neither should they be uncapitalized or expressed as a plural. The designation should apply to something that is named, rather than used itself as the name. “I am a Certified Genealogist” is an example of improper usage. “I hold the Certified Genealogist credential” is proper.
- Whenever you use your full category designation or its short form, identify it as a mark in one of these two ways:
  - (1) Add a superscript<sup>®</sup> the *first* time the Certified Genealogist credential or the short form CG are referred to in a letter, report, or other document. Similarly, add a superscript<sup>SM</sup> on first mention of the Certified Genealogical Lecturer credential or the credential short form CGL. If your equipment will not superscript or lacks symbols, place an R or SM in parentheses. Only the *first* reference needs the superscript or symbol.
  - (2) Place a notice explaining the marks in a box or footer on the page where the credential first appears. A notice can also be placed in the introductory matter. Adapt the wording to your own category or categories. For example:

Certified Genealogist and CG are registered trademarks and the designations CGL, and Certified Genealogical Lecturer are service marks of the Board for Certification of Genealogists<sup>®</sup>, used under license by Board certificants who meet competency standards.

*Note:* The Board's own name is registered in the U. S. Patent and Trademark Office, and therefore should carry the appropriate symbol<sup>®</sup> as a superscript on first reference. As an alternative, registration of the Board's name can be acknowledged through explanatory text.

Use of the category names and short forms is also governed by stylistic conventions. The category name is capitalized; it is best to use small capitals or

full-size capitals set in a smaller point size. Do not separate the initials with periods.

For example:

John Doe, Certified Genealogist<sup>®</sup>, Certified Genealogical Lecturer<sup>SM</sup>  
John Doe, CG<sup>®</sup>, CGL<sup>SM</sup>

Your right to use a credential lasts only as long as you are certified in that category. You may continue to use the category designation, however, between filing a renewal application (before certification expires) and awaiting notification of the judges' evaluation results.

Should you need or desire to attest the accuracy of your transcriptions or extracts (*not abstracts*)—to file with lineage-society applications, for example—you may use your category designation in the following manner:

The above transcription [extract] is an accurate rendering of the cited record.

**Your Signature,**

Certified Genealogist<sup>®</sup>  
No. 1234; expires February 2014

*Seals*

The Board's license also includes permission for you to use the distinctive seal that identifies you as certified. The certification seal can be used on stationery, reports, invoices, business cards, and flyers—*but not in books, monographs, or other materials you publish, or with attestations or other materials that might mislead the reader into believing that the work product has the Board's specific endorsement.* Note that the seal is protected with a service mark. Please do not remove this mark.

The Board's corporate seal, which appears on your certificate, is used only on official BCG publications and papers (as, for example, the title page of this guide).

**Other Benefits**

*Newsletter*

You will continue receiving the educational newsletter *OnBoard* for as long as your certification is in good standing (with annual maintenance fees paid) and while your renewal application is pending.

*Identification Card*

You are provided with a wallet-sized certification ID card because some research facilities and courthouse personnel may require evidence of your certified status before granting records access.

## Appeals

If your application is not approved and you feel one or more judges did not give it a fair appraisal, you may appeal for a review by the Board's trustees.

### *Burden of proof*

If you elect to appeal, the burden is on you to establish by clear and convincing evidence that the grounds for the original decision were incorrect.

### *Deadlines*

If you wish to appeal, you must notify the executive director of your intention within sixty days of the date on which your application was denied. Once you have notified the executive director of your intention to appeal, you will then have thirty days to prepare and submit an appeal statement explaining your reasons for disputing the outcome. A copy of your portfolio must also be supplied to BCG before the end of this thirty days.

### *Method of submission*

All appeals are evaluated electronically. Since your portfolio was originally submitted electronically, you will need to resubmit your portfolio only if BCG has already destroyed its copy. The executive director will advise you if this is the case. Appeal statements may be submitted by email.

### *What not to include*

Appeal statements must *not* include new material (i.e., work that was not previously reviewed by the judges). You need not supply the judges' evaluations—the trustees will use the office copies for their review.

### *Scheduling of appeals*

Appeals are usually considered by the Board at its next meeting. However, to ensure adequate time for review, appeals that are received less than 30 days before the next meeting will be deferred to the following meeting. Meetings are held twice a year, in May and October.

### *Process*

Each trustee will evaluate your portfolio independently. Each of them will also review your appeal statement and the judges' evaluations. The merits of your case will then be discussed by the Board in a closed session. A two-thirds affirmative vote is required to alter the original decision.

### *Notification of outcome*

You will be notified as to whether your appeal was upheld or denied. BCG does *not* supply reasons for appeal decisions.



# Appendix A

## The Genealogist's Code of Ethics

Applicants for certification sign the following code to signify their agreement to abide by its provisions.

### **To protect the public**

- I will not publish or publicize as fact anything I know to be false, doubtful, or unproved; nor will I be a party, directly or indirectly, to such action by others.
- I will identify my sources for all information and cite only those I have personally used.
- I will quote sources precisely, avoiding any alterations that I do not clearly identify as editorial interpretations.
- I will present the purpose, practice, scope, and possibilities of genealogical research within a realistic framework.
- I will delineate my abilities, publications, and/or fees in a true and realistic fashion.
- I will not publish any personal, genealogical, or genetic information disclosed to me unless I have informed consent or omit personally identifying detail. I will also treat publicly available information about living people with sensitivity and will not publish any information with foreseeable potential for harm.

### **To protect the client (paying or *pro bono*)**

- I will reveal to the client any personal or financial interests that might compromise my professional obligations.



- I will undertake paid research commissions only after a clear agreement as to scope and fee.
- I will, to the best of my abilities, address my research to the issue raised by the client and report to that question.
- I will seek from the client all prior information and documentation related to the research and will not knowingly repeat the work as billable hours without explanation as to good cause.
- I will furnish only facts I can substantiate with adequate documentation; and I will not withhold any data necessary for the client's purpose.
- If the research question involves analysis of data in order to establish a genealogical relationship or identity, I will report that the conclusions are based on the weight of the available evidence and that absolute proof of genealogical relationships is usually not possible.
- If I cannot resolve a research problem within the limitations of time or budget established by contract, I will explain the reasons why.
- If other feasible avenues are available, I will suggest them; but I will not misrepresent the possibilities of additional research.
- I will return any advance payment that exceeds the hours and expenses incurred.
- I will not publish or circulate reports in which a client or colleague has a proprietary interest without that person's informed consent. I will respect this interest whether my report was made directly to the client or to an employer or agent.

#### **To protect the profession**

- I will act, speak, and write in a manner I believe to be in the best interests of the profession and scholarship of genealogy.
- I will participate in exposing genealogical fraud; but I will not otherwise knowingly injure or attempt to injure the reputation, prospects, or practice of another genealogist.
- I will not attempt to supplant another genealogist already employed by a client or agency. I will substitute for another researcher only with specific, written consent of and instructions provided by the client or agency.
- I will not represent as my own the work of another. This includes works that are copyrighted, in the public domain, or unpublished. This pledge includes reports, lecture materials, audio/visual tapes, compiled records, and authored essays.
- I will not reproduce for public dissemination, in an oral or written fashion, the work of another genealogist, writer, or lecturer without that person's written consent. In citing another's work, I will give proper credit.

**To protect people who provide DNA samples**

- When seeking DNA from a living person for genealogical research, I will explain
  - a) how I would use and share their genetic information and the risks and benefits of that use and sharing;
  - b) the possibility and consequences of discovering unanticipated relatives, unknown medical conditions, unexpected ethnic backgrounds, and intentional misinformation about such situations;
  - c) options for openness and privacy, how other researchers could or could not access the data; and why complete anonymity and privacy can never be guaranteed.

After providing this information, I will request and comply with the consent, freely given by the person providing the DNA sample or that person's guardian or legal representative.

- When working with DNA test results of living people, I will not publish personally identifying information without each test taker's consent. I will not privately share a match list without the list owner's consent. If I have the list owner's consent, I may privately share details of a match without the match's consent.



# Appendix B

## Getting Help

### The Essentials

*The BCG Application Guide* is the ultimate authority for information about BCG's certification requirements. *Genealogy Standards* provides information about genealogical standards. These two publications are essential for all applicants and take precedence over other materials.

### BCG Website

BCG's website offers many helpful resources. Pages of special interest include "BCG Learning Center," "BCG Resources on Key Skills," "DNA Resources," "Educational Activities," "Frequently Asked Questions," "Genealogical Work Samples," and "OnBoard Articles."

### Mentoring

*Online support:* Preliminary applicants are invited to subscribe to BCG's support group, Aids to Certification Testing: Interactive Online Networking—otherwise known as ACTION. Applicants are responsible for their own skill development, but subscribers to this e-mail list may ask questions about the certification process and requirements. Authoritative answers are supplied by knowledgeable BCG associates.

*Personal Mentors:* Applicants may choose to seek a BCG associate as a personal mentor. Because the best mentoring relationships are those that are initiated privately, these arrangements are left to individuals. BCG does not assign mentors. Check the online roster for a certified person near you.

## Newsletter

BCG's newsletter, *OnBoard*, regularly offers educational articles. It is published three times a year and is provided free to preliminary applicants. Other non-certified individuals may subscribe by contacting the office.

## Examples

Examples of work samples meeting BCG standards are available on the BCG website and elsewhere. Specifically:

*Document work:* For examples of transcriptions and abstracts, see "Document Analysis Skills" under the BCG website's "Test Your Document Skills" section.

*Research reports:* Reports written to BCG standards are found on the "Genealogical Work Samples," page at BCG's website. These examples illustrate the manner in which different assignments might be handled, but standards do not require duplicating the letterhead style, data arrangement, or precise format.

*Case studies:* See the "Genealogical Work Samples," section of BCG's website. Models for case studies may also be found in major genealogical journals.

*Kinship-determination projects:* Examples of kinship-determination projects with embedded proof discussions are found at BCG's website under "*Genealogical Work Samples*."

*Proof summaries and proof arguments:* For a discussion of these and an example, see Barbara Vines Little, "It's Not That Hard to Write Proof Arguments," published in *OnBoard* 15 (September 2009), 20–23. It is also available under "OnBoard Articles" at BCG's website.

*Successful portfolios:* Examples of successful portfolios may be viewed at the BCG booth at national conferences and some genealogical institutes.

## Lectures, Workshops, and Seminars

*Lectures:* The Board cosponsors a Skillbuilding track at national conferences with presentations about genealogical standards, specific types of work products, and subjects such as research planning, citations, evidence evaluation, and the Genealogical Proof Standard.

*Workshops:* The BCG Education Fund, an independent trust founded to promote BCG's educational aims, sponsors workshops focusing on devel-

opment of genealogical skills. These workshops are held on the day preceding the start of the National Genealogical Society conference.

*Certification Seminars:* Also presented at major conferences, these seminars take a comprehensive look at the application process and requirements.

### **Citations**

Genealogy follows the humanities-style reference-note format for citations. Because guides for other fields do not address many types of records used in genealogical research, BCG recommends the models in Elizabeth Shown Mills's *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, third edition, revised (Baltimore: Genealogical Publishing Co., 2017). A Kindle version is available from Amazon.

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