



# THE BCG

## APPLICATION GUIDE

BOARD FOR CERTIFICATION OF GENEALOGISTS  
Providing quality in genealogy since 1964



# THE BCG APPLICATION GUIDE

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Post Office Box 14291

Washington, DC 20044

<http://www.BCGcertification.org>

[office@BCGcertification.org](mailto:office@BCGcertification.org)





# CONTENTS

<b>INTRODUCTION</b>	
Certification	i
Essential Materials	i
<b>RESEARCH-CATEGORY APPLICATION</b>	
The Application Process	1
Requirements: CG Applicants	3
<b>TEACHING-CATEGORY APPLICATION</b>	
The Application Process	9
Requirements: CGL Applicants	10
<b>RENEWAL APPLICATIONS</b>	
The Renewal Process	13
Requirements: Renewal Applicants	14
<b>EVALUATION &amp; APPROVAL OF APPLICATIONS</b>	
The Evaluation Process	19
After Approval	20
Appeals	23
<b>APPENDIX A</b>	
The Genealogist's Code	25
<b>APPENDIX B</b>	
Getting Help	27
<b>INDEX</b>	31



# INTRODUCTION

## CERTIFICATION

Certification is extended by the Board for Certification of Genealogists® to applicants who successfully demonstrate their ability to meet standards of quality and ethics. 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.

The category names and their related short forms (initials) are service marks owned by the Board and used by certified associates under license. The service mark for the research category is CG<sup>SM</sup> or Certified Genealogist<sup>SM</sup>; for the teaching category, it is CGL<sup>SM</sup> or Certified Genealogical Lecturer<sup>SM</sup>. 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 *The BCG Genealogical Standards Manual*.<sup>\*</sup> The *Guide* describes the application and evaluation process. It also sets out the requirements applicants must fulfill to demonstrate their skills. The *Standards Manual* describes the standards against which applicant work is measured. The standards, codified by BCG in 2000, are widely accepted as benchmarks of genealogical excellence.

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<sup>\*</sup> *The BCG Genealogical Standards Manual* (Orem, Utah: Ancestry, 2000).



# 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, subject, and/or 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. 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 photocopy of an historical document corresponding with the interest you specified on your preliminary application, and (c) a copy of the Genealogist's Code. You will also need the current edition of *The BCG Genealogical Standards Manual*.

#### *Completing the Category Application Form*

- *Fill out the top section only* and return it to the BCG office along with your completed portfolio and payment of the final application fee.
- *Do not fill out the bottom section* of the form. It is there for use by the first judge who evaluates your portfolio.

### *Demonstrating Your Skills*

BCG's research-category requirements test your skills in the following 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 should meet the criteria specified in this *Guide*. They should also showcase your skills and demonstrate your understanding of the standards articulated in the *Standards Manual*. Be selective. Quantity is not synonymous with quality. If your portfolio exceeds two pounds, it likely contains more than is needed.

### *Presenting Your Materials*

Your portfolio will consist of several parts. Organize and label them in a lightweight three-ring binder with section dividers but without sheet protectors. For information on electronic submissions, see BCG's website at <http://www.bgc certification.org/certification/requirements.html>.

### *Meeting the Deadline*

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

### *Mailing Your Application*

Send *one* copy of your portfolio by Priority (not Express) mail to the BCG office at PO Box 14291, Washington, DC 20044. If your portfolio weighs between two and three pounds, a surcharge is required to cover higher handling costs. Contact the BCG office for the current rate and include payment with your application.

Portfolios that weigh three or more pounds are not accepted.

As packages are occasionally lost in the mail, retain a complete copy of your portfolio in your files.

## GETTING HELP

BCG supports applicants with numerous resources including *OnBoard*, an educational newsletter, and ACTION, an online mentoring group. 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, you should also adhere closely to the standards outlined in *The BCG Genealogical Standards Manual*. The material you submit in fulfillment of Requirements 3 to 7 will be measured against those standards. The standards applicable to each requirement are identified throughout these instructions.

*Requirement restrictions*

Published work may not be submitted for any of the requirements in an initial application. The original unedited manuscript of a published work *is* acceptable if the work meets all of the criteria for a requirement. Also, successful portfolios reflect diversity; therefore, none of the individuals named in a document or work sample should appear in any other work sample in your application.

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

**1 Genealogist's Code**

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

**2 Background Résumé**

The following items are not evaluated but provide BCG with general background about applicants and their activities.

**2-A** *Describe briefly your educational background.* Include genealogical and non-genealogical training, degrees, or certificates; and state when and at what institutions or institutes this education was acquired. Specific training is not a prerequisite for certification; this is strictly an informational item.

**2-B** *Identify non-English languages you read and/or write proficiently.* Proficiency in other languages is not required unless you specialize in a non-English field.

**2-C** *Discuss briefly your reasons for seeking certification.*

**2-D** *Discuss briefly your experience in genealogical research.*

- 2-E** *Discuss briefly the research facilities* where you normally work. Include
- *the names of the facilities* and a general description of holdings you consider important for the kind of work you do, and
  - *the approaches you use* to access materials distant from your home. Include, as applicable (a) Internet sites or microfilm rental programs, (b) how you access materials not online or not filmed, (c) frequency of personal travel for research, and/or (d) your use of on-site agents.
- 2-F** *List articles, books, or other writings you have published.* Use standard bibliographic format. If this background item does not apply to you, state “No publications.”
- 2-G** *List genealogical, historical, or hereditary societies* to which you belong. Include, if you wish, a brief description of your activities in these organizations, especially those that have contributed to your genealogical development.

### **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, subject, time period, or other interest 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 6, 7, 8, 11}
- 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 6, 7, 8, 14}
- 3-C** *Submit a statement identifying a research focus.* 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 problem 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.
- 3-D** *Submit an analysis* of the data in the document related to the research problem you proposed in item 3-C. Your analysis should address concepts set forth in Standards 20–25 and 28–30.

**3-E** *Submit a research plan* (one page or less) describing the *first* steps for continuing research to resolve the problem defined in 3-C. {Standard 5} You should

- 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 Document Work (Applicant-Supplied Document)**

*Select and provide a copy of a document* that represents the geographic area, subject, or time period in which you normally work. The document should exhibit the handwriting of its historical era. Choose a document that will allow you to display your skills in transcribing, abstracting, analysis, and research planning. Some documents will serve all of these purposes better than others.

*Supply for this document the five treatments* described in Items 3-A through 3-E, following the same directions and standards.

#### **5 Research Report Prepared for a Client**

*Submit one report* prepared for a client that represents authorized research about a genealogical problem. The report should reflect analysis of the problem, *in-depth and skillful use of a range of sources*, and recommendations for further work based on your findings.

The client 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 (the "client"), 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 client or agency that authorized the work. Do not re-research the problem, alter the documentation, or re-format the report before sending it to the Board.

**Note:** If you are not now working for paying clients, *pro bono* authorizations can be solicited from friends, neighbors, or correspondents. "Clients" might also be library users, courthouse patrons, or society members whose inquiries require in-depth research.

The client research report should adhere to

- data-collection standards 1–18,
- evidence-evaluation standards 19–34, and
- compilation standards 35–43.

**Note:** If the client required abbreviated citations for a specialized project, include their statement to that effect and attach separate sheets with full references in BCG-recommended format.

Include *your conclusions* about whether the client’s objective was reached—regardless of whether the underlying genealogical problem was solved. (BCG recognizes that some problems cannot be solved and that others require more extensive work than clients authorize in a single segment.)

- 5-A** *Submit copies of all photocopies or other document images* that accompanied the original report, exactly as they were sent with the report. {Standards 9, 10}
- 5-B** *Submit the client’s authorization letter or e-mail* describing the nature of the project you were to undertake and specifying the limitations on your time, travel, and expense. {Standard 38, third bullet}
- 5-C** *Submit the client’s written permission* for the report’s use in your portfolio.

Because reports done for clients normally include background information they supply, BCG requires inclusion of a specific “permission to use” notice with *all client 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, Appendix A.}

## 6 Case Study: Conflicting or Indirect 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 problem of *relationship* or *identity* that cannot be resolved from uncontested direct evidence.

- Your chosen problem may relate to your own family or a client’s.
- Your presentation should use *one* of the following techniques:
  - (a) assembling and correlating *indirect* evidence
  - (b) resolving a conflict between two or more items of *direct* evidence
  - (c) resolving conflict between *direct* evidence and *indirect* evidence
- You should supply for your case study a title or label that indicates your choice of technique (a), (b), or (c) above.

- Your discussion should
  - (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 this proof as persuasive.

Do not attach document photocopies, transcriptions, or abstracts unless they are essential to illustrate a point.

The Genealogical Proof Standard, which your case study is expected to meet, is described on pages 1–2 of the *Standards Manual*. Your case study should also conform to Standards 35, 44–49, and 70 as well as to the evidence-evaluation standards relevant to your choice of technique. {Standards 19–34}

## 7 Kinship-Determination Project

*Submit a narrative genealogy, narrative lineage, or narrative pedigree* that documents and explains linkages among individuals through at least three ancestral generations—ascending or descending.\* The explanation of linkages *must include* proof discussions 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. Information on living individuals should not be included unless their permission is obtained and supplied with the project.

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

- sufficiently broad research to ensure that any evidence is adequately tested {Standard 19}
- accurate placement of each individual within the family {Standards 20–34, and 50}
- descriptive biographical information for each couple in the genealogy, lineage, or pedigree {Standard 51}
- documentation of every statement of fact that is not common knowledge {Standard 53}

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\* “Three ancestral generations” means a project should include at least three couples in successive generations. “At least” means applicants may provide more extensive genealogies, lineages, and pedigrees of more than three couples if they wish.

- names and known 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 52}

*The two proof discussions* may present either direct, indirect, or conflicting evidence. You may present two narrative-style proof summaries (dealing with direct evidence), two proof arguments (discussing indirect or conflicting evidence), or one proof summary and one proof argument. Each proof summary or proof argument should

- discuss why you believe your conclusion is valid;
- demonstrate use of the Genealogical Proof Standard, as well as Standards 44–48 in the *Standards Manual*; and
- be supported by full source citations. {Standard 49}

**Caution:** This requirement calls for narrative-style, source-cited text discussions. List-style proof summaries do *not* meet the requirement.

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 7, 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 mail 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 Your Materials

Your application will consist of several parts. Organize and label them in a lightweight three-ring binder with dividers but without sheet protectors. Protect your recording materials with bubble-wrap or padded envelopes.

Instructions regarding acceptable formats 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.

## Mailing Your Application

Send your portfolio by Priority (not Express) mail to the BCG office at the address on the title page of this *Guide*. Your CGL materials may not weigh more than two pounds. As packages are occasionally lost in the mail, retain a copy of your portfolio (including recorded materials) in your files.

## 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 audiotape or digital recordings of two lectures* you have presented, each of which meets Standards 57 and 60 and the following criteria:

- The lecture was at least a half-hour long but no longer than one hour.
- It directly relates to genealogical sources, methods, and/or standards.

Submit your recordings on standard sized audiotapes or in digital format on CD-ROM. Digital recordings must be in a standard format such as .WAV or .MP3.

- 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 58–59}
- 2-C**     *Submit paper copies* (black-and-white or color) of your visual aids or computer-programmed projections.

- If you use maps, charts, or other materials too bulky to include in the portfolio, supply citations to them.
- If you use a chalk- or white-board for illustrative writings or drawings during the session, reproduce them on paper for inclusion in your application portfolio.

You may also submit copies of your slides as created in PowerPoint or other presentation software. However, paper copies are still required in case of technical difficulties.

- 2-D**     *Submit a list* of materials (books, periodicals, tapes, CDs, websites, computer programs, and so forth) you recommend for further study of the topic. {Standard 58}

- 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 you are submitting lecture recordings on CD-ROM, you may include items 2-A, 2-B, 2-C, and 2-D on the disk. These files must be in a standard digital format such as Rich Text Format (.RTF) or Portable Document Format (.PDF).

**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.

### 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. Please notify the office if you have not received the form 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 you hold certification in a single category*, check the “Renewal” box and complete the rest of the *top part* of the form. Return it with your renewal portfolio and renewal fee to the BCG office address given on the title page of this *Guide*.

*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 the *Standards Manual* 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.

## Presenting and Mailing Your Materials

Organize and mail your materials following the instructions on page 2. The same weight limits apply to research-category renewals as to new applications. Teaching-category materials should not exceed two pounds.

## REQUIREMENTS: RENEWAL APPLICATIONS

In your initial portfolio, you demonstrated your knowledge of standards and ability to work to them. Your renewal portfolio should show you routinely translate that knowledge and ability into the kind of day-to-day work the Board and public expects of certified persons. Consequently, your renewal is judged not on whether you *can meet* the standards but on whether you *are working* to them as a matter of course.

*Please note:* You are expected to have corrected any significant faults pointed out by the judges of your previous applications.

## 1 Genealogist's Code

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

## 2 Research-Category Renewal

Submit each of the following:

**2-A** *Activities.* List your genealogy-related activities during the last five years and in a sentence or two discuss each activity's relationship to updating or expanding your (a) research, analysis, reporting, and/or problem-resolution abilities; (b) understanding of current standards; (c) background knowledge about geographic areas, time periods, or subjects with which you normally work; and—if applicable—(d) your recognition of educational or technological advances in the field. {Standards 73 and 74}

**2-B** *Roster listing.* Describe briefly any changes you wish made to your contact information, special interests, or research availability as listed in the online directory. If no changes are required, respond "No changes."

**2-C** *Records access.* Discuss briefly (one page or less) the research facilities where you now work and/or expect to work during the next five years. Your discussion should include

- the names of the repositories and a general description of the holdings you consider important for the kind of work you do, and
- the method(s) you use to access distant materials. Include in your description (a) microfilm rental programs and online resources and how you access materials that have not been filmed or placed on-line, (b) frequency and extent of your research travel, and/or (c) use of onsite agents.

**2-D** *Work samples.* Choose up to four samples of your work from the past five years that best meet the following criteria:

- If your renewal is due on or after 1 June 2012, at least one work sample *must* demonstrate use of the Genealogical Proof Standard.
- Your choices should relate to the research-category's primary focus—i.e., broadly based genealogical projects whose goal is finding evidence, assembling proof, and writing historical accounts of the identities and relationships of individuals.

*Submit no more than four work samples.* The samples you submit may all be the same type of work, or they may be drawn from a variety of types—as long as the preceding criteria are met. 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:

- Research reports you prepared.
  - (a) If for 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 client authorization and client permission as described in research-category requirements 5-A, 5-B, and 5-C on page 6 of this *Guide*. If the client required abbreviated citations for a specialized project, include their statement to that effect and attach full references in BCG-recommended format.
  - (b) If for your own files, include (1) statements of the problems your research was planned to solve and (2) photocopies of documents that support your conclusions.
- Proof arguments written to record your conclusions about genealogical problems.
- Case studies written to demonstrate genealogical techniques.
- Journal, magazine, newspaper, newsletter, or Internet articles about genealogical problems, methods, sources, or standards (not general news items). (See “Standards for Writers,” *Standards Manual* pages 23–25.) If an article was published without standard citations, attach a separate sheet with full references in BCG-recommended format.
- 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.
- Family histories, published or unpublished. A significant sample of long works is acceptable.
- Lineage-society applications you researched and assembled, together with copies of the supporting documents that were attached. If done for a client, include documents discussed in research-category requirements 5-A, 5-B, and 5-C. Include a copy of the society’s application instructions. If the society required abbreviated citations, attach a separate sheet with full references in BCG-recommended format.

- Lineage-application reviews you wrote as a society registrar or archivist—ideally with “before” and “after” copies of the application and supporting documents.
- 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.
- Audiotapes or 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 representative sample (paper copy) of your visual aids. For a lecture to be evaluated, *all* related materials must be submitted. Audiotapes, handouts, syllabus material, or slides will not be evaluated as standalone items.

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

**Note:** If your submissions include significant work done by one or more other persons, identify them *and their specific contributions*. {Standards 3 and 4}

### 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-D 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. Your application will be carefully 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 quality standards and the requirements for your certification category.

### **The Judges' Response**

You will receive a report of each judge's evaluation of your portfolio's strengths and weaknesses, if any. 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. The rubrics are posted at BCG's website so that applicants can be guided by them when preparing their portfolios. See <http://www.bcgcertification.org/certification/judging>.

*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*

Portfolios 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.

**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 information, research availability, and special interests listed on the Board's roster at <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. {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 stationery, business cards, and flyers; books, articles, and other publications; lecture and course announcements, handouts, name tags, and conference registrations.

There are, however, several conditions for use of credentials that BCG associates must observe. Category designations—their full names and short forms—are service marks of the Board and they must be identified as such in order to protect the Board’s exclusive use of them. Therefore:

- Identify the full category designation or short form service marks by adding a superscript<sup>SM</sup> (or, if your equipment will not superscript, include the SM in parentheses).

*Note:* The service mark symbol is necessary only the *first* time the category name or short form appears in a letter, report, or other document. It does not need to be repeated thereafter. (If, for example, your letterhead carries the marks, you need not include them in the signature line.)

- Avoid using any category name or short form as a freestanding noun or in the plural, or in other ways that might be construed as generic, all of which can weaken the designation’s value as an exclusive, distinctive identification of Board-certified persons.
- When you design your stationery, invoices, website, and so forth, also include a notice similar to that which follows. (The wording, which might appear in small type at the bottom of the page, should be adapted to your own category or categories.)

Certified Genealogist and Certified Genealogical Lecturer and their short forms are service marks of the Board for Certification of Genealogists<sup>®</sup> and are used here under license.

Certified Genealogist and CG are proprietary service marks of the Board for Certification of Genealogists<sup>®</sup> used by the Board to identify its program of genealogical competency evaluation and used under license by the Board’s associates.

*Note:* The Board’s own name is registered as a service mark in the U.S. Patent and Trademark Office, and therefore should carry the appropriate symbol<sup>®</sup> as a superscript on first reference.

Use of the category names and short forms is also governed by stylistic conventions. The category name is capitalized; the initials *are not separated by periods* and are best written in small capitals or full-size capitals set in a smaller point size. For example:

John Doe, Certified Genealogist<sup>SM</sup>, Certified Genealogical Lecturer<sup>SM</sup>  
John Doe, CG<sup>SM</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>SM</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 that one or more of the judges did not give your portfolio a fair appraisal, you may appeal for a review by the Board's trustees. To file an appeal, use the following procedure:

- Notify the executive director that you wish to file an appeal. (It is not necessary to include your reasons for appealing unless you have a question that needs to be answered before you file.)
- The executive director will give you a filing deadline and alert the trustees to expect your appeal.
- Prepare an appeal statement explaining your reasons for disputing the judges' recommendations and place it in a folder marked "Appeal." Do *not* include new material, i.e., material that was not previously reviewed by the judges.
- Create and save to a disk PDF copies of (a) your original portfolio *exactly* as it was returned to you and (b) your appeal statement (see above). When making the PDF of your portfolio, *be sure to divide it into multiple files* to make it more manageable to review electronically.
- Package and mail the following items to the BCG office via Priority Mail with Delivery Confirmation:
  1. Your original portfolio *exactly* as it was returned to you.
  2. Your "Appeal" folder containing your explanation of why you are disputing the judges' recommendations.
  3. The disk containing the PDFs of your original portfolio and your appeal statement.

You need not include the judges' evaluation reports—the trustees will use the office copies for their review.

Each trustee will evaluate the electronic copy of your portfolio as if he or she were acting as an original judge and will then review your appeal-folder material and the judges' evaluation reports. Your portfolio and appeal folder (i.e., the hard copies) will be held in the BCG office for reference in case anything in the PDFs is illegible. At the next Board meeting, the merits of your case will be discussed. A two-thirds affirmative vote is required to alter the decision of the panel of judges. You will be notified of the results, and your original portfolio will be returned to you.



# Appendix A

## THE GENEALOGIST'S CODE

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.

### **To protect the consumer (client, correspondent, or relative)**

- I will keep confidential any personal or genealogical data given to me, unless I receive written consent to the contrary.
- I will reveal to the consumer any personal or financial interests that might compromise my professional obligations to him or her.
- 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 consumer and report to that question.
- I will seek from the consumer 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 will not withhold any data necessary for the consumer'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 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 agreement or 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 research or reports to which the consumer has a proprietary right without prior written consent of the consumer. I will observe these rights whether my report was made directly to the consumer or to an employer or agent.

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

- I will act, speak, and write in a manner consistent with the best interest and standards of both the profession and the scholarship of genealogy.
- I will assist legitimate efforts to expose genealogical charlatans; 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, letters, 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.

# Appendix B

## GETTING HELP

### The Essentials

*The BCG Application Guide* is the ultimate authority for information about BCG's certification requirements. *The BCG Genealogical Standards Manual* 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 "Are You Ready?" "Skillbuilding," "Frequently Asked Questions," "Sample Work Products," and "Educational Preparation." A two-hour certification seminar is available for viewing under "Become Certified."

### Mentoring

*Online mentoring:* Preliminary applicants are offered the opportunity to subscribe to BCG's mentoring group, Aids to Certification Testing: Interactive Online Networking—called ACTION, for short. 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 also 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 in the *Standards Manual*, on the BCG website, and elsewhere. Specifically:

*Document work:* See the BCG website under "Test Your Skills."

*Client reports:* Reports written to BCG standards are found in Appendix C of the *Standards Manual* and on the "Sample Work Products" 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:* Appendix D of the *Standards Manual* offers one example of a case study. For others, see the "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 "Sample Work Products." Appendixes E, F, and G of the *Standards Manual* illustrate standard formats, handling of children's lists, and typography.

*Proof summaries and proof arguments:* For a discussion of these, see Barbara Vines Little, "It's Not That Hard to Write Proof Arguments" published in *OnBoard*, September 2009, and available under "Skillbuilding" at BCG's website. This article includes an explanation of current terminology relating to proof discussions. A proof argument is also illustrated in the *Standards Manual*, Appendix D, Example 2, although the evolution of terminology means its identification as a proof summary is now outdated. Appendix D, Example 1, Cover-Sheet List Format, illustrates a *list-style* proof summary and is, therefore, inappropriate for the kinship-determination project, which calls for any proof summaries to follow narrative style.

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

## 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 development 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* series. The series currently offers five works to choose from:

- Mills, Elizabeth Shown. *Evidence! Citation & Analysis for the Family Historian*. Baltimore: Genealogical Publishing Co., 1997.
- ———. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. Revised edition. Baltimore: Genealogical Publishing Co., 2009.
- ———. *QuickSheet: Citing Online Historical Resources Evidence! Style*. Revised edition. Baltimore: Genealogical Publishing Co., 2007.
- ———. *QuickSheet: Citing Ancestry.com Databases and Images Evidence! Style*. Baltimore: Genealogical Publishing Co., 2009.
- ———. *QuickSheet: Citing Online African-American Historical Resources Evidence! Style*. Baltimore: Genealogical Publishing Co., 2010.

## Other Publications

- *The Chicago Manual of Style*. Sixteenth edition. Chicago: University of Chicago Press, 2010. (For matters of editorial style.)
- Curran, Joan F., Madilyn Coen Crane, and John H. Wray. *Numbering Your Genealogy: Basic Systems, Complex Families, and International Kin*. NGS Special Publication No. 97. Revised edition of Special Publication No. 64. Arlington: National Genealogical Society, 2008.
- Mills, Elizabeth Shown, editor. *Professional Genealogy: A Manual for Researchers, Writers, Teachers, and Librarians*. Baltimore: Genealogical Publishing Co., 2001.
- ———. *Evidence Analysis: A Research Process Map*. Washington, D.C.: Board for Certification of Genealogists, 2006.



# INDEX

- ACTION ..... 27
- American Sign Language ..... 10
- Appeals..... 23
- BCG Certification Roster..... 15, 20
- BCG Genealogical Standards Manual*...i, 1, 2, 3, 7, 8, 14, 16, 27, 28
- Biographical data  
for narratives ..... 7
- Case Studies..... 6–7, 16, 28
- Certification  
ID card ..... 22  
seal ..... 22
- Certification categories  
defined..... i  
names & short forms, use of ..... 20–22
- CG  
category requirements ..... 3–8
- CGL  
category requirements ..... 10–11  
defined..... 9
- Citations  
abbreviated..... 6, 16  
guides for..... 29
- Client research reports..... 5–6, 16, 28
- Clients  
defined..... 5  
project authorizations ..... 5  
permissions ..... 6
- Credentials  
*See* service marks
- Deadlines  
appeal..... 23  
final application..... 2  
renewal..... 13, 14
- Digital recordings..... 10, 17
- Document Work  
Applicant-supplied..... 5, 28  
BCG-supplied..... 4–5, 28
- Ethics ..... i  
*See also* Genealogist’s Code
- Evaluations ..... 19–20, 23
- Evidence Explained* ..... 29
- Examples..... 28
- Family, your own ..... 6, 7
- Fees, discussion of  
annual maintenance ..... 20, 22  
excess postage ..... 2  
final application ..... 1  
preliminary application..... 1  
renewal..... 14  
teaching category..... 9
- Forms  
Category Application..... 1, 9, 14, 17  
Preliminary Application..... 1
- Genealogical Proof Standard... 6, 7, 8, 15, 29
- Genealogist’s Code ... 1, 3, 6, 15, 20, 25–26
- Genealogy, narrative..... 7
- Getting Help..... 27–29
- Initials, category short form  
defined ..... i  
use of..... 20–22
- Judges..... i, 19–20, 23
- Kinship-Determination Project .... 7–8, 28
- Languages, non-English..... 1

- Lectures  
 BCG-sponsored .....28–29  
 portfolio submissions.....10, 17
- Licenses, BCG associates' .....i, 21, 22
- Lineage, narrative..... 7
- Lineage society applications.....16, 17
- Mailing  
 appeals packages ..... 23  
 portfolios..... 2, 10, 14  
 weight limit ..... 2, 10, 14
- Mentors ..... 27
- OnBoard*.....22, 28
- Pedigree, narrative ..... 7
- Portfolios  
 presentation of ..... 2, 10, 14  
*See also* Requirements
- Professional Genealogy*  
*A Manual for*..... 29
- Proof arguments ..... 7, 8, 16, 28
- Proof summaries.....7, 8, 28
- Publications ..... 29
- Published work .....3, 16
- Renewal  
 deadline .....13–14  
 dual-category ..... 14  
 early preparation for..... 13  
 research-category .....15–17  
 standards.....14  
 teaching-category ..... 17
- Reports  
*See* Client research reports
- Requirements  
 renewal..... 14–17  
 research-category .....3–8  
 teaching-category ..... 10–11
- Research availability..... 15, 20
- Résumés..... 3–4, 10
- Roster listing ..... 15, 20
- Rubrics ..... 19
- Sample work products.....28
- Seals  
 BCG's, use of.....22  
 certification, use of .....22
- Seminars, BCG-sponsored ..... 28–29
- Service marks ..... i, 20–22
- Sources  
*See* citations
- Simultaneous renewals ..... 14
- Special interests ..... 1, 15, 20
- Website, BCG.....27
- Work Samples  
*See* Requirements
- Workshops, BCG Education Fund  
 sponsored .....29





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