

## FEELING A BIT INTIMIDATED?

Building a portfolio of your very best work for peer review is a wonderful learning experience, regardless of its outcome—but the thought of it can be intimidating, too. The Board has prepared guides to lead you step by step through the assembly of your portfolio. If you are feeling even a bit intimidated, the application process will seem much more “do-able” with this approach:

- Read through *The BCG Application Guide* for an overview, then reread the specific discussions on the application process and the individual required elements.
- For each requirement, refer to the corresponding standards in BCG’s manual, *Genealogy Standards*. Each application requirement is designed to showcase your ability to meet these standards.
- Decide what materials you want to submit for Requirements 4–7. You may already have work samples of this type prepared. Review them. Evaluate them against the standards set out in *Genealogy Standards*. Decide which projects will best display your expertise.
- Set aside a block of time for each requirement and complete it before moving to the next requirement.
- As you complete a requirement, mark it off on a working copy of the Category Application Form. Continue this process until you have finished and marked all the items on the form.
- Put your application aside for a week. Then review your entire portfolio in one session. Check punctuation, grammar, and spelling. Is the portfolio complete? Did you follow directions in putting it together? *Good. Send it in!*

## NOTE

This brochure is designed for persons who have filed the preliminary application for certification following *The BCG Application Guide*. The Guide and application form may be downloaded separately at the BCG website. Both the website and BCG office addresses appear below.

This brochure offers counsel and suggestions only. For further help:

- Full instructions for the certification application are in *The BCG Application Guide*.
- More Q&As can be found at the BCG website.
- The research, evaluation, and reporting qualities an application should demonstrate are described in BCG’s manual, *Genealogy Standards* (Nashville, Tennessee: Ancestry.com, 2014), 81 pages.

## Application Tips Q&As



### BOARD for CERTIFICATION of GENEALOGISTS

POST OFFICE BOX 14291  
WASHINGTON, DC 20044  
<http://www.bcgcertification.org>  
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# FREQUENTLY ASKED QUESTIONS

## IS FORMAL EDUCATION IN GENEALOGY NECESSARY?

No specific program of education is required for a successful application. However, candidates who expand their knowledge—whether by self-education or through a formal program—typically submit applications that exhibit stronger skills. Educational opportunities are offered by conferences, institutes, college-affiliated certificate or degree programs, and online courses and webinars. Applicants also benefit from regular study of methodological articles, case studies, and model genealogies published in the major journals. See BCG's brochure *Educational Preparation* for a range of suggestions.

## HOW LONG DOES THE EVALUATION PROCESS TAKE?

The average is five months. BCG knows you are eager for results and makes every effort to expedite the process. However, portfolio evaluators are among the most active genealogists in the field. When portfolios arrive on their desks on the eve of a conference, institute, or research trip, the review process can be delayed. Please be patient. The time between submission and final determination bears no relationship to the quality of the application.

## WHAT QUALITIES DO JUDGES LOOK FOR?

Successful portfolios meet quality standards generally accepted in the field and must meet the Genealogical Proof Standard. They demonstrate ample knowledge of resources for the area in which the applicant specializes and a sound understanding of both research methodology and principles of evidence analysis. They attest the applicant's ability to evaluate a research problem, conduct research efficiently and expertly, then report documented findings in whatever manner is appropriate to the project undertaken.

## WHAT ARE SOME COMMON MISTAKES TO GUARD AGAINST?

- Relying on too few sources.
- Presenting information or conclusions with no supporting evidence—or lumping many statements and sources into a single citation without specifying which data is supported by which source.
- Failing to differentiate between information found in a document and one's own analytical or interpretive comments.
- Using unreliable sources.
- Omitting significant data from abstracts.
- Difficulty in evaluating sources and discussing their research significance. (For "Document Work," it is important to interpret the records, not just reword the information.)
- Submitting research plans based upon just the most obvious detail or most general kinds of sources.
- Not following BCG or client instructions.

## WHAT ARE THE MOST COMMON PROBLEMS WITH CLIENT REPORTS ?

- Submitting a simple "look-up" assignment.
- Misinterpreting documents used within the report.
- Failing to advise clients of weaknesses that exist in the material provided.
- Failing to cite sources or providing seriously incomplete citations—both in the research report and on attached documents, charts, and the like.
- Presenting a report that is difficult to comprehend, insufficiently proofread, or otherwise unprofessional.
- Omitting the client's letter of instruction and permission to use the report.

## WHAT ARE THE MOST COMMON PROBLEMS WITH CASE STUDIES?

- Failing to conduct reasonably exhaustive research.
- Reaching premature conclusions.
- Missing important clues in documents.
- Misreading basic legal language.
- Failing to cite sources or providing seriously incomplete citations.
- Failing to illustrate one of the required techniques.

## WHAT ARE THE MOST COMMON PROBLEMS IN NARRATIVE LINEAGES, GENEALOGIES AND PEDIGREES?

- Failing to prove kinship links between the generations.
- Failing to present at least two proof arguments for kinships that are based on multiple pieces of independently created evidence or evidence that must be otherwise correlated.
- Making hasty, unsupported conclusions.
- Limiting research to a few common sources such as censuses, obituaries, and vital records.
- Presenting superficial sketches of individuals and outlines of families, instead of fully reconstructing lives from a variety of sources and placing those lives in relevant social and historical context.

## HOW MUCH MATERIAL SHOULD I SUBMIT?

Quality always trumps quantity. As a rule, a well-constructed portfolio will be free of extraneous material. Experience teaches that such a portfolio, submitted electronically, will not exceed 200 pages, and one submitted by mail will not exceed two pounds in weight.