

Judges: For each indicator below, mark the description that best applies to the work sample you are evaluating. Within each description, pay special attention to the words *and* (all criteria in the description must be met) and *or* (any of the criteria can be met). Also, before making a selection please compare qualitative terminology in each row—for example, “all significant,” “most,” “many,” and “a few.” In each rubric, these are comparisons, not “absolutes” that can be interpreted in isolation.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
Requirement 2—Development Activities				
DA1. Engagement in development activities Standards 82–83 ¹	The applicant has engaged in a variety of development activities aimed at improving genealogical standards attainment.	The applicant has engaged in development activities aimed at improving genealogical standards attainment but the variety of activities is limited.	The applicant’s activities are not targeted at improving genealogical standards attainment.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator.
Requirements 3 and 4—Document Work (BCG-Supplied and Applicant-Supplied)				
DW1. Accuracy of transcription Standards 23–24, 29, 32	Nearly every word and idiosyncrasy (spelling, punctuation, capitalization, signatures, or marks) is precisely rendered; obsolete letter forms are appropriately recorded; difficult or partially illegible words are transcribed; and transcriber comments are clearly identified.	More than a few words and idiosyncrasies are not precisely rendered or more than a few words are missing; obsolete letter forms are misrendered; some difficult or partially illegible words are not attempted; or transcriber comments are not clearly identified.	Many words and idiosyncrasies are not precisely rendered; many words are missing or not attempted.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
DW2. Completeness of transcription Standards 29, 32	All sections of the document are transcribed, including headings, insertions, endorsements, and notations; blots, tears, or other physical flaws affecting legibility or completeness are mentioned.	A small section of the document is omitted; or some significant physical characteristics are overlooked.	A significant section of the document is omitted; or no significant physical characteristics are noted.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
DW3. Accuracy of abstract Standards 23–24, 30, 32	The abstract retains the document’s original meaning; it quotes any ambiguous words and phrases; and it identifies any editorial comments as the abstractor’s.	The abstract slightly alters or obscures the document’s meaning; or it does not clearly identify editorial comments as the abstractor’s.	The abstract significantly alters or obscures the document’s meaning.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.

¹ For more information about the standards, see Board for Certification of Genealogists, *Genealogy Standards*, 50th-anniversary edition (Nashville, Tennessee: Ancestry, 2014).

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
DW4. Completeness of abstract Standards 29, 30, 32	All significant information from all parts of the document is reported; boilerplate phrases are excluded; blots, tears, or other physical flaws affecting legibility or completeness are mentioned.	A small part of significant information is omitted; some boilerplate phrases are retained; some significant physical characteristics are overlooked.	A significant amount of information is omitted; many boilerplate phrases are retained; no significant physical characteristics are noted.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
DW5. Adequacy of citation Standards 1–6, 32	A complete and accurate citation is provided.	A citation is provided but is inaccurate or incomplete.	No citation is provided.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
DW6. Analysis of reliability Standards 35–39, 44	All characteristics and evidence indicating reliability, credibility, and accuracy of information are correctly appraised, including puzzling information or inconsistencies.	A few characteristics or evidence indicating credibility, reliability, and accuracy are poorly appraised or not considered.	Many characteristics or evidence indicating credibility, reliability, and accuracy are poorly appraised or not considered.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
DW7. Analysis of background context Standards 12, 24, 41	Analysis of the document’s background considers all significant geographic, political, legal, and historical factors, and recognizes phrases, terms, and other characteristics of the record common to the area, time period, or record type.	Analysis of the document’s background overlooks a few relevant geographic, political, legal, or historical factors, or shows unfamiliarity with a few relevant phrases, terms, or other record characteristics.	Analysis of the document’s background overlooks many relevant geographic, political, legal, or historical factors, or shows unfamiliarity with many relevant phrases, terms, or other record characteristics.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
DW8. Analysis of information relevance and soundness of presumptions Standards 42, 45	The analysis identifies all significant information in the document relevant to the research question specified in requirement 3-C; all presumptions are valid.	The analysis overlooks a few significant items of information relevant to the research question; or a presumption is unsound.	The analysis overlooks much relevant information in the document; or several presumptions are unsound.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
DW9. Analysis of evidence Standards 40, 43	The analysis recognizes all direct, indirect and negative evidence relevant to the research question specified in requirement 3-C.	The analysis overlooks some direct, indirect and negative evidence relevant to the research question.	The analysis overlooks much direct, indirect and negative evidence relevant to the research question.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
DW10. Efficiency of research plan Standard 9–16	The research plan identifies logical sources and efficiently prioritizes first steps for the discovery of evidence that will help answer an effectively focused research question; and all sources in the plan are fully identified.	The research plan omits or gives low priority to a logical first step; it proposes a redundant, irrelevant or likely unproductive step; an inadequately focused question reduces efficiency; or some sources mentioned in the plan are not fully identified.	The research plan omits or gives low priority to several logical first steps; the steps are mostly redundant, irrelevant or likely unproductive; one or more unfocused or unrelated questions prevent efficiency; or many sources mentioned in the plan are not fully identified.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
Requirement 5—Research Report Prepared for Another Person				
RR1. Responsiveness to recipient’s specifications Standards 10 and 67 (bullets 3–5)	The research question or questions are clearly defined and effectively focused, and the report either fulfills all of the recipient’s requests, instructions, and goals for the assignment or explains why it was not possible.	Some part of the research question or questions is unclear or unfocused; or some of the recipient’s requests, instructions, or goals are left unfulfilled without explanation.	The research question or questions are unclear or ineffectively focused; or many of the recipient’s requests, instructions, and goals are left fulfilled without explanation.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR2. Extent and efficiency of research Standards 9–18, 19, 41, 51 (bullets 1–2)	Research covered commonly used sources relevant to the problem and extended to those that might illuminate or challenge other findings in the time allowed; and it proceeded in a logical sequence. ²	Research bypassed or gave low priority to a logical source or overlooked a few records that might illuminate or challenge other findings in the time allowed; or it included a few redundant or irrelevant steps.	The research bypassed two or more commonly used sources that could have been consulted in the time allowed; or it mostly consisted of poorly prioritized, redundant or irrelevant steps.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.

² “Commonly used sources” are defined here as those addressed by chapter titles in part 2 of Val D. Greenwood, *The Researcher’s Guide to American Genealogy*, 3rd edition (Baltimore: Genealogical Publishing Co., 2000).

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
RR3. Adequacy of source citations Standards 1–7, 22, 55	Sources are cited fully and consistently, following recommended standards; lapses of any kind are few in number and generally minor in consequence.	Key citations or important details are sometimes missing or inaccurate; or the format or style has numerous inconsistencies.	Many citations are missing, incomplete or inaccurate; or the format or style has little or no consistency.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR4. Adequacy of starting-point information Standard 67 (bullet 2)	A clear summary of earlier research informs the recipient of the investigation’s starting point and goals.	Earlier research is not recapitulated completely or accurately enough to easily remind the recipient of the starting point or goals.	Earlier research is not recapitulated at all.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR5. Comprehensive-ness and accuracy of reported findings Standards 23–27, 67 (bullets 7–8)	Positive and negative findings are reported accurately and in sufficient detail to avoid repetition of the same searches later; and contents of records and comments about them are clearly distinguished.	Positive and negative findings are reported with occasional lapses in accuracy or detail; or contents of records and comments about them are sometimes indistinguishable.	Many positive or negative findings are not accurately or fully reported; or contents of records and comments about them are mostly indistinguishable.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR6. Quality of evidence Standards 35–39, 44, 46, 51 (bullet 3)	Evidence is drawn from reliable sources and information, and the use of any evidence of low credibility is logically defended.	Some evidence is drawn from reliable sources and information, but the high credibility of several items is not recognized, or a few items of low credibility are used without justification.	Much evidence is drawn from unreliable sources and information without any justification.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR7. Correlation and assembly of evidence Standards 40, 42–43, 45, 47, 53, 57–59	The most significant connections and contradictions in evidence are discussed; irrelevant information is excluded.	A few significant connections or contradictions in evidence are overlooked.	The conclusion is based on one source, so no correlation of evidence is involved; or many points of agreement or disagreement in evidence from multiple sources are not acknowledged; irrelevant information is included; or discussion is superficial or missing.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR8. Resolution of conflicting evidence Standard 48	Conflict resolutions are logical; or research to gather additional evidence is proposed.	Conflict resolutions are plausible but not fully clear or persuasive.	Most conflict resolutions are illogical, unclear, or unconvincing; or research to gather additional evidence is not proposed.	The applicant did not follow <i>Application Guide</i> <div style="text-align: center;">NOT APPLICABLE</div> No conflicting evidence.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
RR9. Soundness of conclusions Standards 49–50, 52	All final and intermediate conclusions are consistent with reliable and sufficient evidence.	A final or intermediate conclusion is partially inconsistent with relevant evidence; or a conclusion rests on only partially reliable or only partially sufficient evidence.	A final conclusion or many intermediate conclusions are not consistent with relevant evidence; or a conclusion rests on unreliable or insufficient evidence.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR10. Clarity of report Standards 54, 60–63, 67 (bullet 1)	The report’s format and sequence are easy to follow; and explanations and comments are clear, and largely free from grammar, spelling, punctuation, and typographical errors.	The report’s format or sequence is occasionally hard to follow; or explanations are occasionally unclear; or occasional grammar, spelling, punctuation, or typographical errors hinder reader understanding.	The report’s arrangement is confusing; or explanations are frequently disorganized, rambling, or off-topic; or many grammar, spelling, punctuation, or typographical errors hinder reader understanding.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
RR11. Document images Standards 8, 28, 64, 67 (bullet 9)	All document images provide an exact reproduction of the entire item of interest; and each one bears a complete source citation; and images are cross-referenced in report.	All document images exactly reproduce the entire item of interest; a few images lack a complete source citation; or cross-references are not provided.	Several document images exclude part of the item of interest, or one or more appear to have been inappropriately altered; or many images lack complete source citations.	The applicant did not follow <i>Application Guide</i> directions closely enough ... <div style="text-align: center;">NOT APPLICABLE</div> No document images accompanied the report.
Requirement 6—Case Study: Conflicting, Indirect, or Negative Evidence				
CS1. Extent of research Standards 12, 14, 17, 19, 41, 51 (bullets 1–2)	The research is broadened beyond the person of interest to include family members or associates or same-surname individuals to a degree necessary for the problem; it extends to records that might illuminate or challenge other findings; and it covers all relevant jurisdictions and all commonly used sources appropriate for the research question.	The research extends beyond the person of greatest interest but overlooks some relevant individuals, disregards some records that might illuminate or challenge other findings, or bypasses a relevant jurisdiction or a commonly used source appropriate for the problem.	The research focuses largely on one person; or it disregards many records that might illuminate or challenge other findings; or it overlooks several relevant jurisdictions or two or more commonly used sources appropriate for the problem.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
CS2. Adequacy of source citations Standards 1–8, 22, 55	Sources are cited fully and consistently, following recommended standards; lapses of any kind are few in number and generally minor in consequence.	Key citations or important details are sometimes missing or inaccurate; or the format or style has numerous inconsistencies.	Many citations are missing, incomplete or inaccurate; or the format or style has little or no consistency.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
<p>CS3. Quality of evidence Standards 35–39, 44, 46, 51 (bullet 3)</p>	Evidence is drawn from reliable sources and information, and the use of any evidence of low credibility is logically defended.	Some evidence is drawn from reliable sources and information, but the high credibility of several items is not recognized, or a few items of low credibility are used without justification.	Much evidence is drawn from unreliable sources and information without any justification.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
<p>CS4. Correlation and assembly of evidence Standards 40, 42–43, 45, 47, 53, 57–59</p>	The most significant connections and contradictions in evidence are discussed; irrelevant information is excluded; and any conflicting evidence is presented fully and accurately.	A few significant connections or contradictions in evidence are overlooked; or discussion makes it difficult to see connections and contradictions.	The conclusion is based on one source, so no correlation of evidence is involved; or many points of agreement or disagreement in evidence from multiple sources are not acknowledged; irrelevant information is not recognized; or contradictory evidence is omitted or presented inaccurately.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
<p>CS5. Resolution of conflicting evidence Standard 48</p>	Conflict resolutions are logical.	Conflict resolutions are plausible but not fully clear or persuasive.	Conflicting evidence is left unresolved; or most conflict resolutions are illogical, unclear or unconvincing.	<p>The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.</p> <p style="text-align: center;">NOT APPLICABLE</p> <p>No conflicting evidence.</p>
<p>CS6. Soundness of conclusions Standards 49–50, 52</p>	The final conclusion and all intermediate conclusions are consistent with reliable and sufficient evidence.	The final conclusion or an intermediate conclusion is partially inconsistent with relevant evidence; or a conclusion rests on only partially reliable or only partially sufficient evidence.	The final conclusion or many intermediate conclusions are not consistent with relevant evidence; or a conclusion is based on unreliable or insufficient evidence.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
<p>CS7. Clarity of writing Standards 54, 60–64</p>	The evidence is effectively sequenced; explanations are clear and focused; and the writing is largely free from grammar, spelling, punctuation, and typographical errors.	The evidence sequencing is occasionally ineffective; explanations are occasionally hard to follow; or there are occasional grammar, spelling, punctuation, or typographical errors.	The research process is described more than the evidence; explanations are frequently disorganized, rambling, off-topic, or confusing; or there are many grammar, spelling, punctuation, or typographical errors.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
Requirement 7—Kinship-Determination Project				
<p>KD1. Extent of research Standards 12, 14, 17, 19, 41, 51 (bullets 1–2)</p>	<p>The research underlying all parent-child relationships in the project is appropriately broad for reliable kinship determination; it reaches beyond the person or records of most-direct impact in search of information that might illuminate or challenge other findings, and it covers all commonly used sources appropriate for each circumstance.</p>	<p>The research underlying one kinship determination is not appropriately broadened beyond one person or a few records; or it overlooks a relevant jurisdiction, or a commonly used source appropriate for the circumstance.</p>	<p>The research underlying two or more kinship determinations in the project is not appropriately broadened beyond a few records; or it overlooks several jurisdictions, or two or more commonly used sources appropriate for the circumstance.</p>	<p>The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.</p>
<p>KD2. Adequacy of source citations Standards 1–8, 22, 55</p>	<p>Sources are cited fully and consistently, following recommended standards; lapses of any kind are few in number and generally minor in consequence.</p>	<p>Key citations or important details are sometimes missing or inaccurate; or the format or style has numerous inconsistencies.</p>	<p>Many citations are missing, incomplete or inaccurate; or the format or style has little or no consistency.</p>	<p>The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.</p>
<p>KD3. Quality of evidence Standards 35–39; 44; 46; 51 (bullet 3)</p>	<p>Evidence is drawn from reliable sources and information, and the use of any evidence of low credibility is logically defended.</p>	<p>Some evidence is drawn from reliable sources and information, but the high credibility of several items is not recognized, or a few items of low credibility are used without justification.</p>	<p>Much evidence is drawn from unreliable sources and information without any justification.</p>	<p>The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.</p>
<p>KD4. Correlation and assembly of evidence Standards 40, 42–43, 45, 47, 53, 57–59</p>	<p>The most significant connections and consistencies in evidence pertaining to kinship determinations are discussed; irrelevant information is excluded; and any conflicting evidence is presented fully and accurately.</p>	<p>A few significant connections and contradictions in evidence are overlooked; or discussion makes it difficult to see connections and contradictions.</p>	<p>A kinship determination is based on one source, so no correlation of evidence is involved; or many points of agreement or disagreement in evidence from multiple sources are not acknowledged; irrelevant information is not recognized; or contradictory evidence is omitted or presented inaccurately.</p>	<p>The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.</p>
<p>KD5. Resolution of conflicting evidence Standard 48</p>	<p>Conflict resolutions are logical.</p>	<p>Conflict resolutions are plausible but not fully clear or persuasive.</p>	<p>Conflicting evidence is left unresolved; or most conflict resolutions are illogical, unclear, or unconvincing.</p>	<p>The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.</p> <p style="text-align: center;">NOT APPLICABLE</p> <p>No conflicting evidence.</p>

INDICATOR ↓	<i>MEETS STANDARDS</i>	<i>PARTIALLY MEETS STANDARDS</i>	<i>DOES NOT MEET STANDARDS</i>	<i>UNDETERMINED</i>
KD6. Soundness of conclusions Standards 49–50, 52	All kinship determinations are consistent with reliable and sufficient evidence.	A kinship determination is partially inconsistent with relevant evidence, or rests on only partially reliable or only partially sufficient evidence.	Two or more kinship determinations are not consistent with relevant evidence, or rest on unreliable or insufficient evidence.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
KD7. Clarity of writing Standards 54, 60–64	Proof summaries or proof arguments are clear and effectively sequenced; and writing throughout the project is organized and largely free from grammar, spelling, punctuation, and typographical errors.	Proof summaries or proof arguments are sometimes unclear or ineffectively sequenced; or writing throughout the project contains occasional grammar, spelling, punctuation, typographical or organizational problems.	Proof summaries or proof arguments describe the research process more than the evidence; explanations are frequently disorganized, rambling or confusing; or writing throughout the project contains many grammar, spelling, punctuation, typographical or organizational problems.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
KD8. Biographical information Standard 66	Biographical information places all couples in the project in their respective historical, community, religious, and economic contexts.	Biographical information for some couples in the project is superficial or missing.	Biographical information for all couples in the project is superficial or missing.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.
KD9. Format Standard 65	The project closely follows a format that is generally accepted in the field; any deviations or inconsistencies are few in number.	The project follows a format that is generally accepted in the field but contains many deviations or inconsistencies.	The project uses a format that is not generally accepted in the field.	The applicant did not follow <i>Application Guide</i> directions closely enough to provide the evidence needed to evaluate this indicator; or an unmet standard in another part of the work impedes evaluation.

Overall Evaluation

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