

The BCG Certified Genealogist® Pilot Program Application Guide

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Contents

Introduction	
Certification	i
Essential Materials	i
Certified Genealogist Application	
The Application Process for the Pilot Program	1
Requirements: CG Applicants	3
Evaluation & Approval of Applications	
The Evaluation Process	10
After Approval	11
Appeals	14
Appendix A	
The Genealogist's Code of Ethics	15
Appendix B	
Getting Help	18

Introduction

Certification

Certification is extended by the Board for Certification of Genealogists to applicants who successfully demonstrate their ability to meet research and ethical standards. Certification attests to the competence of an individual's research, analysis, kinship determination, and reporting skills.

Certified Genealogist is a registered trademark. The short form (initials)—CG—is also a registered trademark. Individuals who have earned the credential include genealogists who engage in genealogy for a living as well as family historians who value certification for personal reasons.

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

Essential Materials

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

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

Certified Genealogist Application Pilot Program

The Pilot Program Application Process

Applying for the Certified Genealogist credential under the pilot program is a three-part process. The first part is to file a preliminary application; the second part is to submit portfolio elements 1, 2, 3, and 4.

The third part is to submit portfolio elements 5, 6, and 7. Combined, the second and third parts comprise a portfolio of materials that demonstrates your expertise.

Part 1: Preliminary Application

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

Part 2 Submission: Part 2 Application Form, Genealogist's Code of Ethics, Development Activities, Document Work, and Kinship Determination Project

The package you receive in response to your preliminary application includes (a) a Part 2 Pilot Program Application, (b) a digital image of a historical document corresponding with the interest you specified on your preliminary application, and (c) a copy of the Genealogist's Code of Ethics. You will also need the current edition of *Genealogy Standards*.

Completing the Part 2 Pilot Program Application

Fill out the form, scan it, and upload it with your completed Part 2 elements. The Part 2 fee is due when these elements are submitted. All Part 2 submissions will be screened before being accepted for evaluation. Incomplete submissions and those with many severe problems will not be evaluated. If your portfolio is not evaluated, the application fee will be refunded minus a small processing fee for electronic payments.

Part 3 Submission: Part 3 Pilot Program Application, Updated Genealogist's Code of Ethics, Research Report, and Case Study

If the applicant's Part 2 is deemed sufficient, then the applicant will be sent a Part 3 package which includes an application form and a copy of the Genealogist's Code of Ethics.

Fill out the form, scan it, and upload it with your completed Part 3 elements. The Part 3 fee is due when these elements are submitted.

For Part 2 and Part 3*Demonstrating Your Skills*

BCG's Certified Genealogist requirements test skills in these areas:

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

Selecting Your Materials

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

Portfolio Size

Part 2 must be no more than 75 pages. Part 3 must be no more than 75 pages. Permission included from clients and owners of DNA match lists will not be included in the overall page count.

Submitting an Electronic Portfolio

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

Meeting the Deadlines

In order to submit Part 2, you must be on the clock and submit within the pilot program window, which closes on 31 December 2024.

When an applicant's Part 2 submission is judged sufficient to proceed, the Part 3 submission is due within one year following the date of notification. Only a single one-year extension is allowed between Part 2 and Part 3. The extension fee is due at the time an extension is requested. Therefore, a maximum of two years is allowed for Part 3 to be submitted. If an applicant does not submit Part 3 prior to the final deadline, the application lapses and an applicant must begin the entire process again at Part 1.

Getting Help

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

Requirements: CG Applications

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

Requirement restrictions

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

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

DNA Evidence

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

Part 1 Elements

A complete Part 1 submission includes the completed Preliminary Application Form.

Part 2 Elements

A complete Part 2 submission will include the Part 2 Pilot Program Application and the following materials:

1 Genealogist’s Code of Ethics

Sign and date the copy of the Genealogist’s Code of Ethics that is printed on the back of the Part 2 Application Form. (See also Appendix A.) You must honor any applicable provisions of the code during preparation of your portfolio.

2 Development Activities

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

3 Document Work (BCG-Supplied Document)

The document BCG will send you for this requirement (and that you will return with your portfolio) will represent the geographic area, time period, and language you specified on your Preliminary Application Form. The document will be typical

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

of records you might encounter in your work and, therefore, may contain irregularities such as faded or illegible text, or incomplete or missing citations.

Five treatments of the document are required.

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

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

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

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

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

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

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

4 Kinship-Determination Project

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

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

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

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

Your project must include at least two proof summaries, two proof arguments, or one of each. Each proof must conform with standards for reasoning from evidence 37–50 and standards for genealogical proofs 58–61. If your project includes DNA evidence it must also meet Standards 51–56.

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

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

For more help with this and other requirements, see Appendix B, Getting Help.

If your submission now includes responses to Requirements 1 through 4, you have completed Part 2.

Part 3 Elements

You may not submit Part 3 unless you have been informed that your Part 2 submission was deemed sufficient. A complete Part 3 submission will include the Part 3 Pilot Program Application and the following materials:

5 Genealogist's Code of Ethics

Sign and date the copy of the Genealogist's Code of Ethics that is printed on the back of the Part 3 Pilot Program Application. (See also Appendix A.) You must honor any applicable provisions of the code during preparation of your portfolio.

6 Research Report Prepared for Another Person

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

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

The research report must

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

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

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

Include *your conclusions* about whether the research objective was reached—regardless of whether the underlying genealogical problem was solved. (BCG recognizes some problems cannot be solved and others require more extensive work than can be completed in the time authorized by the commissioning individual.)

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

7 **Case Study: Conflicting, Indirect or Negative Evidence**

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

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

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

- Your discussion must
 - (a) describe the problem;
 - (b) present your evidence, both supporting and contradictory, with full source citations; and
 - (c) state your conclusion and reasons for accepting it as persuasive.

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

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

If your submission now includes responses to Requirements 5 through 7, you have completed Part 3.

Evaluation & Approval of Applications

The Evaluation Process

The Board grants certification upon recommendations made by its panel of judges. Both Part 2 and Part 3 of initial applications are reviewed by at least three of those judges, each of whom is a BCG-certified genealogist with a well-earned reputation for excellence in the field. Each will evaluate your portfolio anonymously and independently of the others. All will be familiar with BCG's standards and the requirements for certification.

The Judges' Responses

You will receive a report of each judge's evaluation of your portfolio's strengths and weaknesses after both Part 2 and Part 3. The evaluations have two sections: rubrics and remarks.

Rubrics

The judges will use rubrics to determine if your work "meets standards," "partially meets standards," or "does not meet standards." The final recommendation of each ("sufficient" or "insufficient" for certification) will be based on whether the work meets most of the standards and the ease with which any unmet standards might be remediable. New application rubrics are posted at BCG's website for use by applicants when preparing their portfolios. See www.BCGcertification.org/process/rubrics/

Remarks

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

Recommendations

Part 2 and Part 3 applications that receive unanimous decisions from all three judges are automatically approved or disapproved, as the case may be. If the judges' recommendations are not unanimous, your portfolio will be sent to an arbitration judge for further review and recommendation.

Notification

The evaluation process for Part 2 and Part 3 normally takes three to four months each. 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 Part 2 review process is complete, the executive director will notify you whether you may proceed to Part 3 and will return your Part 2 application portfolio along with copies of each judge's evaluation.

When the Part 3 review process is complete, the executive director will notify you whether your completed submission has been approved and will return your Part 3 application portfolio along with copies of each judge's evaluation. A successful Part 3 submission results in the awarding of the Certified Genealogist credential.

After Approval

Roster Listing

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

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

Use of Credentials

After final approval you will also be entitled to proclaim your certified status by using your category designation or its short form (initials) after your name. You may use your credential on your website, work products, stationery, business cards, and other materials. It is essential, however, that you do so

appropriately. Certified Genealogist and CG are registered trademarks owned by the Board and used by associates under license. To help legally protect BCG's exclusive use of these marks, always observe these conditions for their use:

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

Certified Genealogist and CG are registered trademarks of the Board for Certification of Genealogists[®], used under license by Board certificants who meet competency standards.

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

Use of the category names and short forms is also governed by stylistic conventions. The category name is capitalized; it is best to use small capitals or full-size capitals set in a smaller point size. Do not separate the initials with periods.

For example:

John Doe, Certified Genealogist®
John Doe, CG®

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®

No. 1234; expires February 2014

It is inappropriate to proclaim any certification status after a successful Part 2 submission.

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 Part 3 submission is not approved and you feel one or more judges did not give it a fair appraisal, you may appeal for a review by the Board's trustees. Part 2 submissions are not eligible for appeal to the Board.

Burden of proof

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

Deadlines

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

Method of submission

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

What not to include

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

Scheduling of appeals

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

Process

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

Notification of outcome

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

Appendix A

The Genealogist's Code of Ethics

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

To protect the public

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

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

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

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

To protect the profession

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

To protect people who provide DNA samples

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

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

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

Appendix B

Getting Help

The Essentials

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

BCG Website

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

Mentoring

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

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

Newsletter

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

Examples

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

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

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

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

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

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

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

Lectures, Workshops, and Seminars

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

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

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 Explained: Citing History Sources from Artifacts to Cyberspace*, third edition, revised (Baltimore: Genealogical Publishing Co., 2017). A Kindle version is available from Amazon.