

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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator.
Requirements 3 and 4—Document Work (BCG-Supplied and Applicant-Supplied)				
DW1. Accuracy of transcription Standards 23, 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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
DW10. Efficiency of research plan Standards 1, 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
Requirement 5—Research Report Prepared for Another Person				
RR1. Focus and responsiveness Standards 10 and 67 (bullets 3–5)	The research question or questions are clearly defined and effectively focused, and the report either fulfills the recipient’s authorization and instructions, or explains why it was not possible.	Some part of the research question or questions is partially unclear or partially unfocused; or the recipient’s authorization or instructions are left partially unfulfilled without explanation.	The research question or questions are unclear or ineffectively focused; or the recipient’s authorization and instructions are left largely unfulfilled without explanation.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator.
RR2. Extent and efficiency of research Standards 9, 11–18, 19, 41, 51 (bullets 1–2)	Research covered commonly used sources ² 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; and efficient steps were proposed for any continuing investigation.	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; or similar problems affected plans for any continuing investigation.	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; or similar problems affected plans for any continuing investigation.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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 or previously known information informs the recipient of the investigation’s starting point.	Earlier research or previously known information is not recapitulated completely or accurately enough to easily remind the recipient of the starting point.	Earlier research or previously known information is not recapitulated at all.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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
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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
RR6. Quality of evidence Standards 35–39, 44, 51 (bullet 3)	Evidence is drawn from reliable sources and information, and the use of any weak evidence 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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, 53–54, 57–59	The most significant connections and contradictions in evidence are discussed.	A few significant connections or contradictions in evidence are overlooked.	Many points of agreement or disagreement in evidence from multiple sources are not acknowledged; or the conclusion is based on one source, so no correlation of evidence is involved.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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; and additional research to address any unresolved conflicts is proposed.	Conflict resolutions are plausible but not fully clear or persuasive.	Most conflict resolutions are illogical, unclear, or unconvincing; or additional research to address unresolved conflicts is not proposed.	<i>Application Guide</i> directions were not followed closely enough. . . .
				NOT APPLICABLE No conflicting evidence.
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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
RR10. Clarity of report Standards 60–63, 67 (bullet 1)	The report’s format and sequence are easy to follow; and the writing throughout is clear, and largely free from grammar, spelling, punctuation, and typographical errors.	The report’s format or sequence is occasionally hard to follow; or writing throughout is sometimes unclear or disorganized or has occasional grammar, spelling, punctuation, or typographical errors.	The report’s format or sequence is confusing; or writing throughout is frequently confusing or disorganized or has many grammar, spelling, punctuation, or typographical errors.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
RR11. Document images and separation safeguards Standards 8, 28, 64, 67 (bullet 9)	All document images exactly reproduce the entire item of interest; each one bears a complete source citation and is cross-referenced in the report; and safeguards protect other report parts from separation or loss.	All document images exactly reproduce the entire item of interest; a few images lack a complete source citation or are not cross-referenced in the report; or safeguards do not protect other report parts from separation or loss.	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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator.
				NOT APPLICABLE Document images were not supplied to the client.

INDICATOR ↓	MEETS STANDARDS	PARTIALLY MEETS STANDARDS	DOES NOT MEET STANDARDS	UNDETERMINED
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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
CS3. Quality of evidence Standards 35–39, 44, 51 (bullet 3)	Evidence is drawn from reliable sources and information, and the use of any weak evidence 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
CS4. Correlation and assembly of evidence Standards 40, 42–43, 45–47, 53–54, 57–59	The most significant connections and contradictions in evidence are discussed; and any conflicting evidence is presented fully and accurately.	A few significant connections or contradictions in evidence are overlooked.	Many points of agreement or disagreement in evidence are not acknowledged; or the conclusion is based on one source, so no correlation is involved; or contradictory evidence is omitted or presented inaccurately.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
CS5. Resolution of conflicting evidence Standard 48	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.	<i>Application Guide</i> directions were not followed closely enough. . . . <div style="text-align: center;">NOT APPLICABLE</div> No conflicting evidence.
CS6. Soundness of conclusions Standards 49–50, 52	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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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
CS7. Clarity of writing Standards 60–64	Writing throughout the project is clear, organized, and largely free from grammar, spelling, punctuation, and typographical errors.	Writing throughout the project is sometimes unclear or disorganized or has occasional grammar, spelling, punctuation, or typographical errors.	Writing throughout the project is frequently confusing or disorganized or has many grammar, spelling, punctuation, or typographical errors.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
Requirement 7—Kinship-Determination Project				
KD1. Extent of research Standards 12, 14, 17, 19, 41, 51 (bullets 1–2)	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.	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.	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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
KD2. 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
KD3. Quality of evidence Standards 35–39; 44; 51 (bullet 3)	Evidence is drawn from reliable sources and information, and the use of any weak evidence 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
KD4. Correlation and assembly of evidence Standards 40, 42–43, 45–47, 53–54, 57–59	The most significant connections and contradictions in evidence pertaining to kinship determinations are discussed; and any conflicting evidence is presented fully and accurately.	A few significant connections and contradictions in evidence are overlooked.	Many points of agreement or disagreement in evidence are not acknowledged; or the conclusion is based on one source, so no correlation is involved; or contradictory evidence is omitted or presented inaccurately.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
KD5. Resolution of conflicting evidence Standard 48	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.	<i>Application Guide</i> directions were not followed closely enough. . . . <div style="background-color: black; color: white; text-align: center; padding: 2px;">NOT APPLICABLE</div> No conflicting evidence.

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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of this indicator; or an unmet standard in another part of the work impedes evaluation.
KD7. Clarity of writing Standards 60–64	Writing throughout the project is clear, organized, and largely free from grammar, spelling, punctuation, and typographical errors.	Writing throughout the project is sometimes unclear or disorganized or has occasional grammar, spelling, punctuation, or typographical errors.	Writing throughout the project is frequently confusing or disorganized or has many grammar, spelling, punctuation, or typographical errors.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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.	<i>Application Guide</i> directions were not followed closely enough to allow evaluation of 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 documenting, research, and writing standards, and any partially met or unmet standards are easily remediable.	The applicant’s work samples do not demonstrate most documenting, research, and writing standards; <i>or</i> the applicant’s work samples demonstrate most 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.