

BCG Certification Workshop Measuring Yourself Against Standards

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- Service** Founded in 1964 to foster public confidence in genealogy, the Board for Certification of Genealogists® (BCG) is the recognized U.S.-based certifying body for genealogists. BCG promotes attainable, uniform standards of competence and ethics among genealogical practitioners.
- Fees** Preliminary application: \$75
Final application: \$300
Annual maintenance fee: \$75
Recertification (every five years): \$300
- Benefits** Become part of a select group of dedicated genealogists.
Make a commitment to the maintenance of quality and public confidence in the field of genealogy.
Achieve an important step in your educational growth.
Receive the BCG newsletter, *OnBoard* – published three times annually.
Receive peer-reviewed evaluations of work samples.
Earn use of credential and logo and appear in BCG online directory

Review the Webinar

A free webinar “Preparing a Portfolio: Applying to Become a Certified Genealogist” can be viewed at <https://bcgcertification.org/learning/skills/webinars/> to accompany this syllabus.

Who Should Apply for Certification?

Certification is open to every genealogist whose work meets standards. Among those certified by BCG are genealogists who study their own family history, researchers who specialize in a particular surname or geographic area, and professionals who conduct research (for a fee or *pro bono*) for other genealogists, as well as attorneys, geneticists, biographers, and academics in many fields. They include teachers at all levels; writers and editors of books, journal articles, and newspaper columns, speakers at local, regional, and national conferences, employees of private and government agencies, lineage or genealogical society volunteers, as well as librarians and archivists.

What Are the Certification Categories?

Certified Genealogist®, the board’s research credential, and CG®, the category short form or initials, are registered trademarks. Certified Genealogical LecturerSM the board’s teaching

credential, and CGLSM, the category short form or initials, are service marks of BCG, used under license by those who are board-certified after periodic competency evaluations. The board's name is registered with USP&TO.

**Certified Genealogist®
CG®**

Those who hold the CG credential conduct wide-ranging projects to find, analyze, and interpret evidence; assemble proofs of identity and relationships; and present sound research reports and historical accounts of families.

**Certified Genealogical
LecturerSM
CGLSM**

Board-certified genealogical lecturers—who also hold the underlying CG credential—deliver oral presentations or teach classes that address genealogical sources, methods, and standards.

How Do I Prepare for Certification?

Education and experience are the two main components in preparing for certification. The goal is to become proficient in applying the standards articulated in *Genealogy Standards*. The Board sets no formal educational requirement. Surveys of successful applicants show that most have availed themselves of structured learning opportunities well above the introductory level—attending institutes, conferences, and workshops or enrolling in online or distance-learning courses. Self-education, derived from analyzing case studies developed by board-certified persons and published in major peer-reviewed genealogical journals, is also helpful.

Experience comes in many forms. Successful applicants are experienced in dealing with the full range of challenges genealogists face. They hone their ability to resolve research problems, develop expertise in specific areas, and strive to meet standards. It takes a substantial commitment of time and resources to acquire the education and experience needed for certification. The achievement of certification is a rewarding personal accomplishment.

What Are the Parts of a Portfolio?

- Requirement 1** Genealogist's Code
- Requirement 2** Development Activities
- Requirement 3** Document Work (BCG-Supplied Document)
- Requirement 4** Research Report for Another Person
- Requirement 5** Case Study (Conflicting Evidence, Indirect Evidence, or Negative Evidence)
- Requirement 6** Kinship-Determination Project (Three-Generation Family Narrative)

Where Can I View Portfolios or Sample Work Products?

- In person at major conferences (at the BCG booth in the exhibit hall)
- In person at major institutes, including the Institute of Genealogy & Historical Research, the Genealogical Research Institute of Pittsburgh, and the Salt Lake Institute of Genealogy

- “Genealogical Work Samples” at the BCG website
<https://bcgcertification.org/learning/skills/genealogical-work-samples/>
- New feature on the BCG website is “DNA Resources”
<https://bcgcertification.org/learning/dna-resources/>
- *The BCG Genealogical Standards Manual* (Orem, Utah: Ancestry, 2000), see Appendices C–G

How Are Portfolios Evaluated?

A minimum of three evaluators review each portfolio. Those three evaluators work independently of each other, without seeing the evaluations prepared by the others. If all three evaluators approve your application, you are automatically certified. Each evaluator prepares an analysis of the strengths and weaknesses of the portfolio. The evaluators use the standards articulated in *Genealogy Standards* to assess the competence of your research, analysis, kinship determination, and reporting skills. The evaluation criteria and the scoring can be found on the “Rubrics” page of the BCG website at <https://bcgcertification.org/process/rubrics/>.

If only one or two evaluators recommend certification, your entire portfolio will be sent to a fourth evaluator (an arbitration evaluator), who will review your work and the evaluations of the three prior evaluators. The arbitration evaluator's decision is final. The evaluations and comments (anonymously written) are returned to you with your portfolio. All evaluators remain anonymous.

Questions you should ask yourself about the work samples for your portfolio:

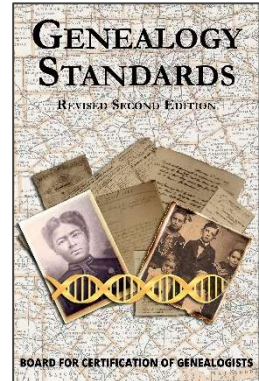
- Do I show that I understand the nature of the records I use?
- Do I show that I understand what each record conveys, when placed in its historic and geographical context?
- Do I show that I understand, when appropriate, the legal basis of the creation of a record?
- Can I identify and skillfully use subtle information (clues) found in various types of records?
- Can I assemble scattered bits and pieces of evidence from a wide variety of records to arrive at a reliable conclusion?
- Do I use enough records to discover the inevitable contradictions and errors that exist in the body of records every person creates?
- Do I routinely address, with sound reasoning, the contradictions and the errors found in the information about each person and event?

Preliminary Application Process

- Return the signed Preliminary Application form (available online) to the office along with the fee payment. For faster processing, return it by email to office@bcgcertification.org and pay online at <https://bcgcertification.org/product/prelim-app-fee/>.
- Submit the portfolio within one year of the dated Preliminary Application.
- If you need an extension beyond the one-year time frame, email the office for instructions.

How Do I Know if I Am Ready to Apply?

Practicing genealogy is often a solitary endeavor. Knowing when we produce work that consistently meets standards is often the hardest part of self-evaluation. There is no one right way to prepare for certification. Successful applicants come from all walks of life. They usually demonstrate some combination of focused-genealogical education and experience.



The following self-test will help determine whether you are ready to apply:

- Do you engage in professional-development activities and reading?
- Have you read and studied *Genealogy Standards*, cover to cover?
- Do you regularly work to standards?
- Do you conduct reasonably thorough research, emphasizing original records, for all evidence that might answer your genealogical question?
- Do you provide complete and accurate citations to all sources you use?
- Do you employ the processes of analysis and correlation to test your sources, information items, and evidence?
- Do you resolve the conflicts that arise from the sources, information items, and evidence you are using to support your proposed solution?
- Do you reach soundly reasoned, coherently written solutions based on the strongest evidence available?

If you can answer yes to these questions, you are ready to compile a portfolio.

Publications

Board for Certification of Genealogists. *Genealogy Standards*. Second edition, revised. Nashville, Tenn.: Ancestry.com, 2021.

———. *The BCG Application Guide*. Washington, D.C.: BCG, 2021. Free download available online at <https://bcgcertification.org/process/app-guide/>.

OnBoard: The Newsletter of the Board for Certification of Genealogists (annual public subscription: \$15).

SpringBoard, BCG's blog at <https://bcgcertification.org/springboard/>.

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