



The BCGG Application Guide 2025

Board for Certification of Genealogists
Promoting quality in genealogy since 1964

The BCG Application Guide 2025

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Introduction

Certification

Certification is extended by the Board for Certification of Genealogists (BCG) to applicants who successfully demonstrate their ability to meet research and ethical standards. Credentials are available for three certification categories: a core research credential and two optional add-on credentials. The Certified Genealogist credential (CG) attests to the competence of an individual's research, analysis, reasoning, and writing skills. All BCG associates are certified with this credential. Associates who also hold the credential Certified Genealogical Lecturer (CGL) meet standards for teaching genealogical skills, methods, and topics. Associates who also hold the credential for Certified Genetic Genealogist (CGG) have demonstrated competence in solving genealogical problems using genetic evidence.

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 maintains the quality expected of modern genealogists.

All portfolio work samples must be written in English. While BCG welcomes applicants whose first language is not English, BCG's ability to evaluate work samples in languages other than English is limited.

Essential Materials

This guide, *Genealogy Standards*, and the rubrics are essential for individuals who seek certification.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, 2019, and 2021, the standards are widely accepted criteria for sound genealogical research. Rubrics based on the standards are used to evaluate applications.

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

Certified Genealogist Application

The Application Process

Applying for the Certified Genealogist credential involves two steps: filing a preliminary application and submitting a complete portfolio. The portfolio is divided into two parts.

- Part 1 includes portfolio elements 1, 2, 3, and 4.
- Part 2 includes portfolio elements 5, 6, and 7.

Combined, Part 1 and Part 2 comprise a portfolio of materials that demonstrates your expertise.

Preliminary Application

Complete BCG's Preliminary Application form indicating the geographic area and time period in which you normally work or are particularly interested. BCG will use this information to select the document you will need to fulfill Requirement 3. Requests for documents in a language other than English need prior consultation with BCG's executive director. This specified area and time period apply only for Requirement 3. Research in other locations, time periods, and languages are allowed for Requirements 4, 6, and 7. Submit the completed form to the office and pay the preliminary application fee. The executive director will then send you an application package electronically. Your fee for the Preliminary Application also includes three issues of the BCG newsletter, *OnBoard*. No separate subscription is needed.

Part 1 Submission: Part 1 Application Form, Genealogist's Code of Ethics, Development Activities, Document Work, and Kinship-Determination Project

In response to your Preliminary Application you will receive (a) a Part 1 Application form, (b) a digital image of a historical document corresponding with the interest you specified on your preliminary application, (c) a copy of the rubrics, and (d) a copy of the Genealogist's Code of Ethics. Separately, you will also need to purchase the current edition of *Genealogy Standards*.

When ready to submit your portfolio, fill out the Part 1 Application form and upload it with your completed Part 1 elements. The Part 1 application fee is due

when the portfolio is submitted. All portfolios will be screened before being accepted for evaluation. Incomplete submissions or those with many severe problems will not be evaluated. If your portfolio is not evaluated, the Part 1 application fee will be refunded minus a processing fee.

Part 2 Submission: Part 2 Application Form, Updated Genealogist's Code of Ethics, Research Report, and Case Study

If your Part 1 is deemed sufficient, then you will be sent a Part 2 package which includes an application form and a copy of the Genealogist's Code of Ethics.

When ready to submit Part 2 of your portfolio, fill out the Part 2 Application form and upload it with your completed portfolio. The Part 2 application fee is due when the portfolio is submitted.

Demonstrating Your Skills

BCG's Certified Genealogist portfolio evaluates skills in these areas:

- understanding research sources and methods,
- planning, executing, and reporting the results of research,
- citing sources,
- evaluating evidence,
- proving kinship, and
- 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 1 must be no more than 75 pages. Part 2 must be no more than 75 pages. Permission statements from clients and your documentation to meet Standard 54, if any, are excluded from the page count. Please include those materials in an appendix or appendices.

Submitting an Electronic Portfolio

BCG requires electronic portfolios. When you are ready to submit, contact the executive director by email. The BCG office will send detailed instructions and a link to a secure server for upload.

Meeting Deadlines

Your Part 1 submission is due before the end of one year, measured from the date you sign your Preliminary Application form. An unlimited number of one-

year extensions may be purchased from the BCG website by paying a “Preliminary Application Extension Fee.”

When your Part 1 submission is judged sufficient to proceed, the Part 2 submission is due within one year following the date of notification that Part 1 is sufficient. Under extenuating circumstances, a single, one-year extension may be requested. The extension fee is due at the time an extension is requested. If you do not submit Part 2 prior to the final deadline, the application lapses and you must restart the entire process.

Resources

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 details.

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* and consult the rubrics for each requirement. The standards applicable to each requirement are identified throughout these instructions. Applications are evaluated using standards-based rubrics that address all aspects of the work, including documentation, research, and writing. The rubrics can be found on BCG’s website:

<https://www.bgcercertification.org/images/files/BCG-New-Application-Rubrics.pdf>.

See [Appendix D](#) for a checklist of requirements that can be helpful when preparing an initial CG application.

Requirement Restrictions

The portfolio should represent your own work. Any contributions made by others must be explained and noted on the application forms. No material in an initial Part 1 or Part 2 application may have been reviewed, critiqued, or proofread by another individual, whether that person is a genealogist or not. 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. Unevaluated portfolios are not subject to this restriction.

BCG's policy on the use of artificial intelligence in portfolios is posted on the BCG website at <https://bcgcertification.org/bcg-ai-portfolio>.

Successful portfolios reflect diversity; therefore, no research subject or family may appear in any other work sample in your application. For example, the daughter of a couple named in the case study should not appear as a wife, mother, or grandmother in the kinship-determination project. However, a DNA test taker may appear in more than one work sample to provide genetic evidence for different research subjects in distinct ancestral lines.

DNA Evidence

DNA evidence is not required for new applications or renewal portfolios. BCG recognizes that DNA is not always available or applicable for a specific problem. Genealogy Standards includes standards for using DNA evidence. 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 guidance on meeting the DNA evidence standards, see the DNA FAQ posted on BCG's website at <https://www.bcgcertification.org/learning/dna-resources#dna-faq>.

Part 1 Elements

A complete Part 1 submission will include the Part 1 Application form and the following Requirements 1–4.

1 Genealogist's Code of Ethics

Sign and date the copy of the Genealogist's Code of Ethics that is part of the application form. (See [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 briefly 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; or (d) abilities to present your findings to others. Your discussion should cover formal and informal development activities in which you engaged. {Standards 89–90} No specific format is required.

² For “genetic relationship,” see *Genealogy Standards* (2021), 79.

3 Document Work (BCG-Supplied Document)

The document BCG will send you for this requirement will represent the geographic area and time period you specified on your Preliminary Application form. The document will be typical of records you might encounter in your work and, therefore, may contain irregularities such as faded or illegible text.

3-A *Cite the document.* {Standards 1–6, 32}

The citation will not be provided to you by BCG. You may locate and cite the original document or base the citation on the document provided by BCG.

3-B *Transcribe the document.* {Standards 23–24, 29, 32}

If the document is in a language other than English, in addition to the transcription, provide a translation into standard English.

3-C *Abstract the document.* {Standards 23–24, 30, 31, 32}**3-D** *Analyze the source and information.* {Standards 24, 35–39}

The analysis should discuss the document's reliability, credibility, and accuracy of information. It should consider the document's background context.

3-E *Identify a single, focused, and testable research question.* {Standard 10}

The document mentions several people, and it states or implies events or circumstances related to them. Using that information, propose a research question identifying (a) whom you would envision researching and (b) what you aim to discover about them.

3-F *Analyze the information and evidence in the document related to the research question.* {Standards 37, 40–45}

The analysis should recognize the information and evidence in the document related to the research question and accurately interpret it.

3-G *Submit a research plan* (one page or less) describing the *first* steps for continuing research to resolve the research question proposed in 3-E. {Standards 1, 9–16}

You must

- base the plan on information 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
- fully identify and prioritize all sources included the plan.

4 Kinship-Determination Project: Descending Narrative Lineage

Submit a descending narrative lineage that documents and explains linkages among individuals through three ancestral generations. Your project is expected to meet the Genealogical Proof Standard (GPS).

Include documented proof summaries or arguments justifying your kinship conclusions for at least two parent-child relationships in different generations.

You may include two proof summaries, two proof arguments, or one of each. Proof statements are not sufficient for these two parent-child relationships. These required proof summaries or arguments must be labeled. 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.

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

Your project 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 lineage {Standard 73}
- documentation of every statement of fact that is not common knowledge {Standards 1–8}
- names and vital data (birth, marriage, and death) of the children of each couple
- uses the numbering format for a narrative lineage and either the *NGS Quarterly* or *Register* styles. See [Appendix C](#) for a reference sheet.

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

Document images 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, in this guide.

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

Part 2 Elements

You may not submit Part 2 unless you have been informed that your Part 1 submission was deemed sufficient. A complete Part 2 submission will include the Part 2 Application and the following Requirements 5–7:

5 Genealogist's Code of Ethics

Sign and date the copy of the Genealogist's Code of Ethics that is part of the application form. (See [Appendix A](#) for the code.) 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. Research sessions of less than twenty hours are unlikely to meet the requirement.

Do not submit genealogies, biographical narratives, case studies, or lineage-society applications 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. Standard 74 describes the essential elements of a report.

The research report must

- use a family other than your own or your spouse's;³
- 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 BCG. 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.

³ The research report should not be about your ancestors, biological or adoptive, your spouse's ancestors, or siblings of any of these people. You may, however, research more distantly related individuals, such as your sister's husband's family or a similar relationship in a more distant generation.

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

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 document images* that accompanied the original report, exactly as they were sent with the report. Images or other materials sent to the client using a digital-file sharing service should be included as a part of the report sent to BCG and will be included in the page count. Links to outside servers are not acceptable. {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 (a stand-alone proof argument) drawn from your own research that (a) demonstrates application of the Genealogical Proof Standard and (b) resolves a significant problem of *relationship* that cannot be resolved from uncontested direct evidence. Identity questions that separate same-named people or merge identities to solve relationship problems are also acceptable. You may not submit a study about a single identifying characteristic of a person such as their date or place of birth.

Your case study must have the following characteristics.

- Your case study must demonstrate in-depth and skillful use of a range of sources.
- Your chosen problem may relate to your own family or a client's.
- Your case study 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.
- 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.

Document images 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 includes responses to Requirements 5 through 7, you have completed Part 2.

Certified Genealogical Lecturer Application

The Application Process

BCG's Certified Genealogical Lecturer (CGL) credential denotes associates who deliver presentations about genealogical subjects, including sources, methods, and standards. The CGL credential is open to those who hold the Certified Genealogist credential. You may not apply for the two credentials simultaneously.

The Application Form

On the CGL Application form, identify when your CG credential was first earned or, if applicable, last renewed. Fill out the remainder of the *top section of the form* and include it with your portfolio and fee payment to the BCG office.

Your CGL credential will expire at the same time as your CG credential. You should therefore time your CGL application to maximize the length of time between its approval and the next renewal of your CG certification.

Demonstrating Your Skills

BCG's CGL credential portfolio evaluates your skills in

- selecting and organizing lecture contents,
- providing accurate and effective presentations, and
- using written and visual learning aids.

Presenting and Submitting Your Materials

Lectures and other materials must be in English.

All portfolios must be submitted electronically. Contact the BCG office for detailed instructions. The application fee is due when the portfolio is submitted.

Requirements: CGL Applications

Applications for the CGL credential must contain the following materials.

1 Certified Genealogical Lecturer Application Form and Genealogist's Code of Ethics

A current copy of the Genealogist's Code of Ethics (included with the CGL Application form) must be signed, dated, and uploaded with your application.

2 Development Activities

List activities that helped you prepare for receiving the CGL credential. In a sentence or two, discuss how each activity helped you gain knowledge and skill specific to teaching genealogy. Both formal and informal development activities, including teaching experience, may be included {Standards 89–90}.

3 Lecture List

Provide a list of genealogical lectures or educational offerings delivered over the past five years. Please include the title, organization, date, and location.

4 Recorded Lectures

Submit digital recordings of two lectures you have presented, each of which meets Standards 81–83, 85–86, and the following criteria.

- The lecture was at least forty-five minutes long but no longer than ninety minutes.
- It directly relates to genealogical sources, methods, and/or standards.
- It was recorded before a live audience, or the recording was subsequently presented to a live audience. The live audience may have been addressed at a conference or by means of a webinar. If someone other than yourself edited the recording before delivery, submit a pre-edited version.

Submit your video recordings in a standard digital format such as MP4. A link to a Legacy Family Tree webinar may also be used but if the recording is inaccessible for any reason this may cause delays in evaluating the portfolio. Links to lectures at other websites are not permitted.

4-A *Submit a copy of your handout or syllabus material.* {Standards 83–84, 86}

4-B *Submit copies* of your slides. {Standard 83}

Please submit a copy of your slides as created in PowerPoint or other presentation software. To ensure evaluation can proceed even if there are technical difficulties, please supply one copy of your slides as a PDF file.

If your portfolio includes responses to Items 1 through 4-B of this section, you have completed your CGL application.

Certified Genetic Genealogist Application

The Application Process

BCG's Certified Genetic Genealogist (CGG) credential denotes associates who have demonstrated competence using genetic evidence to solve complex genealogical problems while meeting standards for using DNA evidence. The CGG credential is open to those who hold the Certified Genealogist credential.

Submitting Your Materials

All portfolios must be submitted electronically. Contact the BCG office for detailed instructions. The application fee is due when the portfolio is submitted.

Portfolio Size

CGG portfolios must not exceed 150 pages. Permissions from clients and owners of DNA test results, if any, and your documentation to meet Standard 54 are excluded from the page count. Please include those materials in an appendix or appendices.

Permissions

You must confirm that you have permission from owners of test results to include those results in your submission. You do not need to have permissions from test takers whose information appears in permission-giving owners' test results.

If your submission includes any material prepared for a client, you must provide the client's permission for you to use the material in your portfolio.

Requirements: CGG Application

Applications for the CGG credential must contain the following materials.

- 1 CGG Application Form and Genealogist's Code of Ethics**
A current copy of the Code of Ethics (included in the CGG Application form) must be signed, dated, and uploaded with your application.

2 Development Activities

List activities that helped you prepare for receiving the CGG credential. In a sentence or two, discuss how each activity helped you gain knowledge and skill specific to using DNA evidence in genealogy. Both formal and informal development activities may be included. {Standard 90}

Activities such as the following may apply.

- Education focused on DNA and genetics
- Practice in analysis and interpretation of genetic evidence for kinship determination
- Applying concepts in Standards 51–57 and the Genealogist’s Code of Ethics, including informed consent
- Writing about or presenting genetic and documentary evidence to reach a conclusion
- Learning about legal and ethical issues related to privacy and terms of service

If you have published genealogical articles using genetic evidence, include a full bibliography.

3 Work Samples

Provide *two* work samples that demonstrate skill in using genetic evidence to reach a genealogical conclusion or to address a research question. Your work samples should meet applicable genealogy standards, including those detailed in the section “Using DNA Evidence” of Chapter 3 in *Genealogy Standards*, 2nd edition revised. {Standards 51–56}

Both work samples should demonstrate the ability to solve genealogical problems. Together the work samples should demonstrate breadth of understanding, use of appropriate DNA tests and test takers, skill at analysis and evidence interpretation, integration of genetic and documentary evidence, respect for living persons, and the ability to communicate findings, reasoning, and conclusions. To demonstrate broad knowledge and expertise, applicants should consider submitting work samples that use more than one kind of DNA test. Casual use of DNA likely will not meet the CGG requirements.

Each work sample must (a) demonstrate application of the Genealogical Proof Standard; (b) use DNA and documentary evidence to resolve a question of relationship or identity that cannot be proved without genetic evidence; and (c) reflect detailed reasoning that integrates DNA and documentary evidence into a defensible conclusion. DNA evidence must be integral to the genealogical conclusion.

Types of Work

A specific format is not required. Good choices may include a stand-alone proof argument, a formal case study, and a research report completed for a client or to file. A research report may reach intermediate conclusions and outline further research steps, like a targeted DNA testing plan, or it may articulate why the research cannot continue. Limitations of lineage-society-application forms and requirements make them poor choices for CGG work samples.

Your work samples may relate to your own family or another family. If you choose to address a straight forward case of a living person's unknown parentage, only one of your work samples should do so. More complicated cases demonstrate advanced skills.

Work Sample Research Contexts

Each work sample must address one or more of fourteen research contexts. For each work sample, attach a checklist indicating which contexts are addressed. The checklist is available with the application form on the BCG website, and lists the fourteen research contexts.

- a. Genetic evidence and documentary evidence disagree.
- b. Insufficient documentary evidence, DNA evidence, or both exist to provide any plausible answer to the research question.
- c. Assembled documentary evidence, DNA evidence, or both suggest more than one equally plausible answer to the research question.
- d. A person whose identity is in question has an unknown given name, last name, or both.
- e. People who closely share Y-DNA but have different last names.
- f. One kind of DNA test is insufficient to help answer the research question.
- g. Multiple hypotheses result from pedigree collapse (for example, a sibling pair marries another sibling pair, first cousins marry, or siblings conceive children with the same person).
- h. A relationship question, identity question, or both have multiple plausible answers.
- i. Multiple plausible sources exist for the source of shared DNA.
- j. The averaged amount of shared atDNA differs significantly from statistical predictions across multiple test takers.
- k. Misattributed parentage occurs in multiple generations.
- l. Documentary evidence is limited, for example, where record destruction is extensive, census or vital records are not extant or informative, or records are few.
- m. Your research question applies to an endogamous community.
- n. Genetic networks suggest unknown ancestral lines.

Your work samples also might require reasoning from visual phasing, chromosome mapping, genetic networks, haplogroup frequency, other factors, or any combination of those factors.

Previously Published or Reviewed Work

You may submit work you have published or submitted to BCG as part of a renewal or new application.

- If your material has been published, submit the unedited version, *not* the published version.
- If you previously submitted the material to BCG, describe any post-submission revisions to the work based on BCG's or others' feedback.

Standards

Your submissions should meet the Genealogical Proof Standard, described on pages 1–3 of *Genealogy Standards*. Your work also must conform to documentation Standards 1–8, research Standards 9–50, DNA Standards 51–56, writing Standards 58–71, and the Genealogist's Code of Ethics, all in *Genealogy Standards*.

If your portfolio includes responses to items 1 through 3, you have completed your CGG portfolio.

Renewal Applications

The Renewal Process

BCG requires all associates to reapply for certification every five years to ensure that the work of certified individuals consistently meets standards. Your certification expires on the fifth anniversary of your initial certification. Your renewal portfolio is due before that date. You may continue to use your credential while you await the evaluation results.

The Application Form

BCG's executive director will send you a Renewal Application form and instructions for uploading an electronic portfolio at least six months before your renewal portfolio is due. Please notify the office if you have not received these items.

If your certification lapses, you will lose the right to use your credential until you submit your renewal portfolio and the evaluation is complete. Associates are allowed a one-year grace period to submit a renewal application after their credential expires. If exceptional circumstances will prevent you from meeting the deadline, please contact the executive director.

If you hold a single credential, check the "Renewal" box and complete the remainder of the *top part* of the form. Submit it with your renewal portfolio and fee.

If you hold multiple credentials and wish to renew more than one, check the boxes for both "Renewal" and "Simultaneous" on the Renewal Application form and submit payment for *all appropriate* renewal fees.

Meeting Standards

Refer to the current edition of *Genealogy Standards* and the rubrics for the qualities judges will look for in your work sample(s). As standards keep pace with accepted practices in the field, changes in standards—those made between editions—are published in BCG's newsletter, *OnBoard*.

If standards advanced significantly during your five-year certification period, you are not required to revise your work sample to reflect the change. Attach a note to let the judges know that you recognize the advances.

Submitting Your Materials

Renewal portfolios must be submitted electronically following the instructions for preparing and uploading portfolios supplied to you by the BCG office.

Requirements: CG Renewal Application

In your initial portfolio, you demonstrated your knowledge of standards and ability to meet them. Your renewal portfolio should similarly reflect sound knowledge of and adherence to genealogical standards. It should also demonstrate improvement in weak areas identified in the initial portfolio and awareness of developments in the field.

Portfolio size

Renewal portfolios for the CG credential must be no more than 100 pages. Permissions from clients and owners of DNA test results, if any, and your documentation to meet Standard 54 are excluded from the page count. Please include those materials in an appendix or appendices.

DNA evidence

DNA evidence is not required for CG renewal portfolios. Genealogy Standards includes standards for using DNA evidence. BCG recognizes that DNA is not always available or applicable for a specific problem. While DNA is required to establish a genetic relationship,⁴ the use of DNA is not required for every research question or in every research context. If DNA evidence is used in a portfolio it must meet standards for using DNA evidence (Standards 51–57) as well as all other applicable standards.

Your CG renewal portfolio must contain the following materials.

- 1 Genealogist's Code of Ethics**

A current copy of the Code of Ethics included with the Renewal Application form must be signed, dated, and uploaded with your portfolio.
- 2 Certified Genealogist Credential Renewal**
 - 2-A *Development Activities.*** List the genealogy-related activities during the five-year period since your last evaluation that helped you prepare for renewal. Briefly 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, or (d) abilities to present your findings to others. Your discussion should cover formal and informal development

⁴ For “genetic relationship,” see *Genealogy Standards* (2021), 79.

activities in which you engaged. The development activities requirement should describe steps taken to remedy shortcomings noted in your previous evaluations. Judges will review your previous evaluations as part of your renewal. {Standards 89–90}

- 2-B** *Work samples.* Include one or two samples of your genealogical work completed during the five-year period since your last evaluation. Submission of a work sample that includes the same deficiencies identified in a prior evaluation may be the basis for finding a portfolio insufficient for renewal. The best choices will involve research undertaken to prove identity and kinship, or set past lives in historical context. **Work samples must meet the Genealogical Proof Standard (GPS).** Case studies, narrative lineages, and *some* research reports are good choices. Your work sample need not be complex.⁵

Submissions should demonstrate your ability to meet all five GPS components, including resolution of conflicting evidence if it is present. The work will be evaluated against documentation standards, research standards, and the writing standards. Applicable standards include 1–8, 12, 14, 17, 19, 37–50, and 58–74. If your proof argument includes DNA evidence it must also meet Standards 51–57.

Published articles may be used and work samples may have been reviewed, critiqued, or proofread by another individual. If your submissions include significant work done by one or more other persons, identify them *and their specific contributions*. {Standard 22} If the work done by you is not clearly distinguishable from the work done by other individuals, the work sample must not be included in the portfolio. If an article was published with abbreviated citations, attach a separate sheet with full references. {Standards 1–8}

The types of work you might consider are numerous and may be work done for yourself or work done for others. Suggestions include the following:

- Proof arguments written to record your conclusions about genealogical questions, especially those involving kinship or identity
- Case studies written to demonstrate genealogical techniques
- Family histories, published or unpublished: These may be lineages, genealogies, or pedigrees. Include proof statements, proof summaries, or proof arguments, as appropriate, to establish each relationship. A submission may cover one generation or more.
- Research reports you prepared: Research reports prepared for clients seldom meet the GPS due to client-imposed restrictions such as time limits that prevent reasonably exhaustive research and therefore would not be appropriate. Research reports prepared for your own files will often be a

⁵ Thomas W. Jones, “The Genealogical Proof Standard: How Simple Can It Be?” *OnBoard* 16 (September 2010): 17–18, 20; available at *Board for Certification of Genealogists* (<https://bcgcertification.org/skillbuilding-the-genealogical-proof-standard-how-simple-can-it-be/>).

better choice. Be sure that your research report meets the GPS. Research reports should also meet these requirements:

- (a) If for your own files, submit any document images that you included as part of it.
- (b) If for another person, submit the report exactly as it was sent and include copies of all accompanying document images, the commissioning individual's authorization and permission as described in the initial CG application requirements 6-A, 6-B, and 6-C [on pages 7–8](#) of this guide. If the report recipient required abbreviated citations for a specialized project, include their statement to that effect and attach full references in BCG-recommended format.

Requirements: CGL Renewal Application

Your CGL renewal application must contain the following materials.

3 Certified Genealogical Lecturer Renewal

Because CGL certification requires concurrent CG certification, you may file the renewal applications simultaneously. To do so, check the “Simultaneous” box on the Renewal Application form and include *both* renewal fees.

3-A Development Activities

Describe briefly activities that helped you prepare for renewing the CGL credential. In a sentence or two, discuss how each activity helped you gain knowledge and skill specific to teaching genealogy. Both formal and informal development activities, including teaching experience, may be included. {Standards 89–90}

3-B Recordings

Submit recordings of one or two lectures presented by you in the last five years. Include (a) copies of syllabus or handout and (b) copies of your slides. For file format specifications, see [section 4 Recorded Lectures](#) of the CGL requirements.

Requirements: CGG Renewal Application

When you successfully completed your initial Certified Genetic Genealogist portfolio, your Certified Genealogist credential renewal date was re-set (extended) to be five years after your CGG award. Your initial CGG portfolio included work samples meeting the Genealogical Proof Standard and was deemed to merit extension of the CG credential.

Expiration of Credentials

Your CG and CGG credentials expire at the same time and renewals for both are due at the same time. To renew both, check the “Simultaneous” box on the Renewal Application Form and include both renewal fees.

Page Limitation

The page limit for a simultaneous CG and CGG renewal is 125 pages. Permissions from clients and owners of DNA test results, if any, and your documentation to meet Standard 54 are excluded from the page count. Please include those materials in an appendix or appendices.

Submission Requirements

You may submit one or two work samples for your simultaneous CG and CGG renewal. Each work sample must meet the GPS. At least one must meet the CGG renewal work sample requirements. You may include one work sample without genetic evidence and one that meets the CGG renewal work sample requirements. One work sample that meets the CGG renewal requirement is sufficient for both the CG renewal and CGG renewal. A renewal submission with a single work sample that is found to be insufficient for CGG renewal will also be insufficient for CG renewal. A work sample without genetic evidence that meets the CG renewal requirements is sufficient to maintain the CG credential. The Code of Ethics form that you sign applies to both renewals.

Genetic Genealogy Development Activities

List the development activities you have undertaken in the last five years related to DNA and genetic evidence. Briefly discuss how each activity helped you keep abreast of developments in genetic genealogy and improve your skills in using genetic genealogy and documentary evidence to reconstruct unknown or forgotten relationships. Include both formal and informal educational activities. Describe steps you have taken to remedy shortcomings noted in previous CGG evaluations. {Standards 89–90}

CGG Work Sample Requirements

Submit one or two samples of your genetic genealogical work completed during the five-year period since your CGG was awarded or most recently renewed. The work sample(s) should meet the Genealogical Proof Standard and should utilize DNA evidence as an integral part of the proof. Submission of a work sample that includes the same deficiencies identified in a prior CGG evaluation may be the basis for finding a portfolio insufficient for renewal. Work samples will be evaluated using the rubrics for new CGG portfolios.

Suitable Types of Work

A specific format is not required. Good choices may include a stand-alone proof argument, a formal case study, and a research report completed for a client or to file. A research report for the CGG renewal may reach intermediate conclusions and outline further research steps, like a targeted DNA testing plan, or it may articulate why the research cannot continue. Limitations of lineage-society application forms and requirements make them a poor choice for CGG work samples and should not be submitted.

Previously Published or Reviewed Work

Published articles may be used and work samples may have been reviewed, critiqued, or proofread by another individual. If your submission includes significant work done by one or more other persons, identify them *and their specific contributions*. {Standard 22} If the work done by you is not clearly distinguishable from the work done by others, the work sample must not be included in the portfolio. If a work was published without standard citations, attach a separate sheet with full references.

Research Report Work Sample

A research report prepared for a client should include permission from the client for BCG to use the report for credentialing purposes. The report should be exactly as sent to the client. Client permissions are not included in the page count.

Evaluation & Approval of Applications

The Evaluation Process

The Board for Certification of Genealogists grants certification upon recommendations made by its panel of judges. Both Part 1 and Part 2 of initial applications are reviewed by at least three judges, each of whom is a BCG-certified genealogist with a well-earned reputation for excellence. Each will evaluate your portfolio anonymously and independently of the others. All have a solid knowledge of genealogy standards and the requirements for certification. Renewal applications are reviewed by at least two judges.

The Judges' Responses

You will receive each judge's evaluation of your portfolio's strengths and weaknesses after both Part 1 and Part 2. The evaluations have two parts: 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 judge ("sufficient" or "insufficient" for certification) will be based on whether the work meets most of the applicable standards and the ease with which any unmet standards might be remediable. Rubrics are posted at BCG's website for use when preparing your portfolio. For new applications, see <https://www.bgc certification.org/images/files/BCG-New-Application-Rubrics.pdf>.

Remarks

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

Recommendations

New applications that receive unanimous decisions from all three judges for Part 1 and Part 2 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. Renewal applications that receive mixed recommendations shall be reviewed by a third judge before being sent to an arbitration judge.

Notification

The evaluation process normally takes four to five months. 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.

When the review process is complete, the executive director will notify you whether your application has been approved and will forward copies of each judge's evaluation. For new applicants, when the Part 1 review process is complete, the executive director will notify you whether you may proceed to Part 2 and will send you copies of each judge's evaluation.

When the Part 2 review process is complete, the executive director will notify you whether your completed submission has been approved and will send you copies of each judge's evaluation. A successful Part 2 submission results in the awarding of the Certified Genealogist credential. If Part 1 was sufficient, but Part 2 was not sufficient, you will need to begin the application process again.

Appeals

If your application is not approved and you feel one or more judges did not give it a fair appraisal, you may appeal for a review by BCG trustees. For Certified Genealogist applicants, only complete applications are eligible for appeal, therefore, Part 1 submissions are not eligible for appeal; but Part 2 submissions are.

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 trustees at their 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, typically 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 trustees 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.

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 BCG 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, BCG assumes you will list your abilities in the realistic fashion prescribed by the Genealogist's Code of Ethics. {[Appendix A](#)}

Use of Credentials and Seals⁶

Upon approval, you may use your credential(s) or initials after your name on websites, work products, stationery, business cards, and other materials—provided you do so appropriately. Certified Genealogist, Certified Genealogical Lecturer, Certified Genetic Genealogist, CG, CGL, and CGG are registered certification marks of the Board for Certification of Genealogists, licensed for use by associates. To help protect BCG’s exclusive rights, follow these usage guidelines.

- Never use a credential or its short form generically. Avoid using articles (“a” or “the”), lowercase formatting, or plural forms. The credential should apply to something that is named, rather than used itself as the name.

Example:

Incorrect: “I am a Certified Genealogist.”

Correct: “I hold the Certified Genealogist credential.”

- Whenever you use your full credential or its short form, identify it as a mark in one of these two ways.

(1) Add a superscript[®] the *first* time the credential (e.g. Certified Genealogist) or the short form (e.g. CG) are referenced in a letter, report, or other document. If your equipment will not superscript or lacks symbols, place an R in parentheses. Only the *first* reference needs the superscript or symbol.

(2) Include a notice explaining the marks in a box or footer on the page where the credential first appears. You may also place it in the introductory section. Adapt the wording to fit your credential(s). For example:

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

BCG’s own name is a registered trademark and, therefore, should carry the appropriate symbol ® as a superscript on the first reference. As an alternative, registration of BCG’s name can be acknowledged through explanatory text.

⁶ For further information, see Michael S. Ramage, JD, CG, “A Primer on the Use of BCG Trademarks,” *OnBoard* 17 (May 2011): 9–10; updated 2 April 2025; available online at *Board for Certification of Genealogists* (<https://www.bcgcertification.org/skillbuilding-a-primer-on-the-use-of-bcg-trademarks>).

Use of the credentials and short forms are governed by stylistic conventions. The credential 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[®], Certified Genetic Genealogist[®]
John Doe, CG[®], CGG[®]

Your right to use a credential lasts only as long as you hold that certification. However, you may continue to use the credential(s) between filing a renewal application (before certification expires) and awaiting notification of the judges' evaluation results.

It is inappropriate to proclaim any certification status after a successful Part 1 submission.

Seals

BCG'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 BCG's specific endorsement*. Note that the seal is protected by a service mark. Please do not remove this mark.

BCG's corporate seal, which appears on your certificate, is used only on official BCG publications and papers, such as 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.

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 provide competent professional services to my clients. Competent services require the genealogical knowledge, skill, thoroughness, and preparation reasonably necessary for the rendering of the client-requested services.
- I will act with reasonable diligence and promptness in handling client work.
- I will keep my clients reasonably informed about the status of the client-requested services.
- 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. Rubrics can be found on the BCG website. These publications are essential for all applicants and take precedence over other materials.

BCG Website

BCG's website offers many helpful resources on its BCG Learning Center page (<https://www.bcgcertification.org/learning>), including "BCG Resources – Key Skills," "Recommended Reading," "DNA Resources," and "Educational Activities." The BCG Resources page includes links to example work samples and to several educational newsletter articles published in *OnBoard*.

Questions About the Process

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 BCG roster for a certified person.

Newsletter

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

Genealogical Work Samples

Examples of work samples meeting standards are available on the BCG website and may be viewed at the BCG booth at national conferences and some genealogical institutes.

Document work: For examples of transcriptions and abstracts, see the BCG website's Test Your Document Skills section: <https://www.bcgcertification.org/learning/bcg-resources-key-skills#test-your-document-skills>.

Research reports: Reports written to standards are found on the BCG website in the Genealogical Work Samples section: <https://www.bcgcertification.org/learning/bcg-resources-key-skills#RR>. 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: For examples, see the BCG website's Genealogical Work Samples section: <https://www.bcgcertification.org/learning/bcg-resources-key-skills#CS>. 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 on the BCG website in the Genealogical Work Samples section. See <https://www.bcgcertification.org/learning/bcg-resources-key-skills#FH>.

Lectures, Workshops, and Seminars

Lectures: BCG 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.

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 Chicago Manual of Style* and Elizabeth Shown Mills's *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*.⁷

⁷ *The Chicago Manual of Style*, 18th ed. (Chicago: University of Chicago Press, 2024). Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, fourth edition (Baltimore: Genealogical Publishing Co., 2024).

Appendix C

Reference Sheet for the Kinship-Determination Project Format: Descending Narrative Lineage

The BCG Application Guide asks applicants to submit a three-generation descending narrative lineage that follows the *NGS Quarterly* (*NGSQ*) or *Register* format. This appendix summarizes key features that apply when evaluating Rubric KD9, Format.

As described in Standard 72: “Lineages show descent from one person or couple or ascent from one person. Lineages highlight only one person, couple or family in each generation.” Generational numbers are not required.

The primary formatting features of lineages are as follows.

	Feature	<i>NGSQ</i>	<i>Register</i>
DATA TREATMENT	Information in genealogical summary	Birth, marriage and death data is given for subject and spouse. Parents of each if known.	Same as <i>NGSQ</i>
	Information in children’s list	Birth, marriage and death data for everyone, even children not carried forward.	Only birth data is given for children carried forward.
	Data order	Date of event first, place of event second.	Place of event first, date of event second.
	Adopted children	Included	Same as <i>NGSQ</i>
	Stepchildren	Included	Same as <i>NGSQ</i>
	Sources	Cited in full in child lists and in short-form when repeated.	Cited in full in biography.
NUMBERING	Individual numbers	Arabic numbers starting at 1 for each person in the direct line or no numbering at all.	Same as <i>NGSQ</i>
	Birth-order numbers	A small Roman numeral for each child in child’s list.	Same as <i>NGSQ</i>

	Feature	NGSQ	Register
TYPOGRAPHY	Names of subject and spouses in genealogical summary	Boldface Walter Honey	Bold, large & small caps WALTER HONEY
	Children's names in child lists	Small caps JAMES GREEN	Large and small caps JAMES GREEN
	Spouse's names in child lists	No special emphasis	Large and small caps
	The words <i>birth</i> , <i>marriage</i> and <i>death</i> , etc. in child's list	Not abbreviated	Abbreviated
	Child's list font size	One or two sizes smaller than rest of text	Same as NGSQ
	Citation reference numbers	Superscript	Superscript numbers in square brackets

Resources for Genealogical Formats for Lineages

For more on formatting narrative lineages, see the following references.

Board for Certification of Genealogists. *Genealogy Standards*, 2nd ed. rev. Nashville: Ancestry.com, 2021. Page 39 for Standard 72, “Genealogical formats.”

Board for Certification of Genealogists. *The BCG Genealogical Standards Manual*. Orem, Utah: Ancestry Publishing, 2000. See Appendices E, F, and G.

Curran, Joan Ferris, Madilyn Coen Crane, and John H. Wray. *Numbering Your Genealogy: Basic Systems, Complex Families, and International Kin*. National Genealogical Society Special Publication No. 97. Edited by Elizabeth Shown Mills. Arlington, Virginia: National Genealogical Society, 2000.

McGhie, Angela Packer. “Writing a KDP as a Narrative Lineage.” *OnBoard* 29 (September 2023). Pages 17–19.

Appendix D

Checklist of Requirements for New Certified Genealogist Portfolio

Note that this checklist does not replace the full descriptions given in the main body of *The BCG Application Guide*. A copy of this checklist is not to be included as part of your portfolio work samples; it is for reference only.

General

- ☐ Re-read each requirement in *The BCG Application Guide* and compare with your work samples.
- ☐ Self-evaluate each rubric and associated standards in *Genealogy Standards* to compare with your work samples.
- ☐ Is your Part 1 portfolio 75 digital pages or less?
- ☐ Is your Part 2 portfolio 75 digital pages or less?
- ☐ Have you avoided using the same person for more than one requirement?
- ☐ Have you paid your fee online or notified the office that you are mailing a check?

Part 1 Applications

Requirement 1: Part 1 Application Form & Code of Ethics

- ☐ Remember to sign and date both pages of the form.

Requirement 2: Development Activities

- ☐ Have you included significant information about your genealogical education?

Requirement 3: BCG-Supplied Document

Remember to include all of the following.

- | | |
|---|---|
| ☐ a copy of the BCG-supplied document | ☐ abstract |
| ☐ citation for the document | ☐ research question |
| ☐ transcript (and translation if needed) | ☐ analysis of the data |
| | ☐ research plan |

Requirement 4: Kinship-Determination Project: Descending Narrative Lineage

- ☐ Have you used one of the standard formats, such as *NGSQ* or *Register*?
- ☐ Have you included two identified proof summaries or two proof arguments (or one of each) as directed?

Part 2 Applications

Requirement 5: Part 2 Application Form & Code of Ethics

- ☐ Remember to sign and date both pages of the form.

Requirement 6: Research Report Prepared for Another Person

Remember to include all of the following.

- ☐ the client's original request or contract
- ☐ client permission to use the report for the portfolio
- ☐ the full report as originally submitted to the client, with all document images included as sent

Requirement 7: Case Study

- ☐ Does your title state which of the three evidentiary techniques you are using?
- ☐ Has the case been solved and proved (as opposed to a research report which may have future research suggestions)?

Suggested Reading

- ☐ Review samples of work at the BCG website:
<https://www.bcgcertification.org/learning/bcg-resources-key-skills#genealogical-work-samples>.
- ☐ Read "Avoiding Common Portfolio Pitfalls," by Laurel T. Baty, in *OnBoard* 24: 9–10 (May 2018), which is available at the BCG website:
<https://www.bcgcertification.org/skillbuilding-avoiding-common-portfolio-pitfalls>.



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