Educational Preparation for Certification: Many Paths to the Same Goal

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There are a variety of topics one needs to STUDY to be prepared to submit a portfolio to the Board for Certification of Genealogists (BCG). This type of education is also beneficial for anyone wanting to do quality research and writing.

There are a variety options for learning the skills required, and there are many educational paths to choose from. There are no specific classes required by the Board for Certification of Genealogist. Each person is evaluated on their demonstrated genealogical skills and ability to analyze evidence and reliably reconstruct families.



Therefore, individuals can evaluate their own knowledge and skills and tailor a course of study to meet their specific needs. In this session we will discuss a wide variety of resources that can be included in an education plan, including books, articles, classes, courses, and study groups. Ultimately, the best form of education is probably experience. Experience researching in original records, analyzing documents, correlating evidence, and writing up research results. The motto, "practice, practice, practice," applies here.

Standards for Continuing Education

There are two genealogy standards that address education:

#82. "Development goals. Genealogists improve and update their (a) attainment of genealogical standards, (b) knowledge of genealogically useful materials and contexts, (c) skills in reconstructing unknown or forgotten relationships, families, people, groups, and events, and (d) abilities to present their findings to others."

#83. "Regular engagement. Genealogists engage in formal or informal development activities, or both, on an ongoing basis:

• Formal development activities include attending conference, seminar, and workshop presentations in person or via electronic media; participating in classroom-based or online courses of study; and engaging in virtual or in-person structured study groups, webinars, and similar venues. Development activities via electronic media may occur either when the event is live or afterward; participation with others may be in real time or asynchronous.

• Informal development activities include conducting genealogical research of increasing difficulty, consulting with advanced practitioners, critiquing other genealogists' work, mentoring or teaching genealogists, studying the field's peer-reviewed research journals, and subjecting written materials to expert critiques."¹

When submitting a portfolio of your work to the Board for Certification of Genealogists, requirement #2 in the *BCG Application Guide* (ref. #2) asks you to list your educational or development activities and how they helped you prepare for certification.

"Activities. List the genealogy-related activities that helped you prepare for certification and in a sentence or two discuss how each activity helped you improve your (a) attainment of genealogical standards, (b) knowledge of genealogically useful materials and contexts, (c) skills in reconstructing unknown or forgotten relationships, families, people, groups, and events, and (d) abilities to present your findings to others. Your discussion should cover formal and informal development activities in which you engaged. {Standards 82–83}"²

Educational Foundation

Before studying topics specific to certification, genealogists need to make sure they have a strong foundation in basic research skills and genealogical records. This would include a detailed knowledge of records such as vital, census, newspaper, cemetery, land, military, probate, and court records, as well as applying the use of DNA in genealogy.

A Sampling of Study options -

- The Researchers Guide to American Genealogy by Val Greenwood (ref. #6)
- The Source: A Guidebook of American Genealogy edited by Szucs and Luebking (ref. #19)
- North Carolina Research: Genealogy and Local History edited by Helen Leary (ref. #9)
- "Intermediate Genealogy" and record / locality courses at IGHR, SLIG, or GRIP (ref. #37-39)
- Boston University Certificate in Genealogical Research (ref. # 35)
- The Family Tree Problem Solver by Marsha Hoffman Rising (ref. #16)
- Webinars, classes or presentations on specific record sets and geographic areas

Essential Study for Certification

There are some resources that are necessary for anyone preparing to apply for certification. Everyone needs to study:

1. The BCG Application Guide (ref #2)

This guide gives details on applying for certification and instructions for preparing each of the seven elements required for the portfolio. Be sure you read and understand the instructions, or

¹ Board for Certification of Genealogists, *Genealogy Standards*, 50th anniversary edition (Nashville, Tennessee: Ancestry, 2014) 43-44.

² Board for Certification of Genealogists, *The BCG Application Guide*, revised 2016 edition, page 2. Online, <u>http://www.bcgcertification.org/brochures/BCGAppGuide2016.pdf</u>

ask questions on the BCG ACTION mailing list (for those who have submitted their preliminary application).

2. Genealogy Standards (ref #3)

This book details each of the 83 standards by which portfolios are judged. They are the best practices in the field of genealogy, compiled over time by many expert genealogists. Read, understand, and then incorporate them into your everyday genealogy work until they become second nature.



3. The BCG Rubrics (ref # 21)

These are the specific criteria by which your portfolio will be judged. Again, make sure you understand them. Take the time to judge your everyday work by these criteria, and especially your portfolio pieces. While the work samples you submit to BCG cannot be reviewed by anyone other than yourself, you can ask colleagues to compare other pieces you produce to these rubrics so you have an idea of how your work measures up.

Not required, but a good idea –

- 4. View the BCG seminar online to see BCG associates discuss the various elements of the portfolio. <u>http://www.bcgcertification.org/seminar/index.html</u>
- 5. View sample work products on the BCG website at http://www.bcgcertification.org/skillbuilders/worksamples.html
- 6. View sample portfolios at major genealogy conferences and institutes. The schedule of events is online: <u>http://bcgcertification.org/blog/calendar-of-events/</u>
- 7. Read the Skillbuilding articles from *OnBoard* that are available on the BCG website. This collection of articles covers analysis of many genealogical sources, as well as standards and skills. <u>http://www.bcgcertification.org/skillbuilders/index.html</u>
- 8. Watch some of the webinars sponsored by BCG. http://bcgcertification.org/blog/bcg-webinars/

Additional Study Options

Resources in this section are not "essential" but can be useful as you prepare for certification.

- 1. BCG SkillBuilding Track at the NGS annual conference. <u>http://conference.ngsgenealogy.org/</u> The 2016 NGS conferences sessions were recorded and are available for purchase <u>http://www.playbackngs.com/event/topics?eid=1505</u>
- 2. Webinars hosted by BCG View them live or in the webinar library at http://familytreewebinars.com/bcg
- 3. Case studies in the peer-reviewed genealogical journals, including *NGS Quarterly*, the *NEHGS Register*, the *NYG&B Record*, *The American Genealogist* and *The Genealogist*.
- 4. The *NGSQ* Study Group discusses the methodology, sources and writing of scholarly articles with other advanced genealogists. See <u>http://ngsqstudygroup.weebly.com/</u>

- 5. Genealogical Institutes have week-long in-depth courses that provide valuable training. See reference 37 through 40 for links and recommended courses at each institute.
- 6. The *ProGen* Study Group participants study the manual *Professional Genealogy* (ref. #13) and practice writing and receiving feedback on research reports, case studies, family narratives, transcriptions, research plans, and evidence evaluation projects. <u>http://progenstudy.org/</u>
- 7. The Gen Proof Study Groups study *Mastering Genealogical Proof* with a mentor. Participants work through the chapters and exercises. <u>https://genproof.wordpress.com/</u>

Studying the Genealogical Proof Standard

Understanding and striving to apply the five elements of the Genealogical Proof Standard (GPS) in your work are also essential to preparing a successful portfolio. The two best guides for this study are *Genealogy Standards* (ref. #2) and *Mastering Genealogical Proof* by Thomas W. Jones (ref. #8).



When studying *Mastering Genealogical Proof* you should **read the chapters**, **study the articles in the appendix, and complete ALL of the exercise**. Practicing each of these skills will make you a better genealogist faster than just reading the material.

There is also a brief summary of the Genealogical Proof Standard on Board for Certification of Genealogists website – <u>www.bcgcertification.org</u>

The GPS: Element by Element

Once you have studied *Mastering Genealogical Proof* you can supplement your study on the five elements of the GPS with other resources. This list is a very brief **sampling** of resources, as there are many more articles, webinars and courses on these topics. To locate more suggestions for each topic see the "Educational Preparation for Certification" series on the *Adventures in Genealogy Education blog*. All of the articles in the series are linked in this main post: http://genealogyeducation.blogspot.com/2016/01/educational-preparation-for-bcg.html

GPS #1: Reasonably Exhaustive Research

- Fox, Judy Kellar. "What Is 'Reasonably Exhaustive' Research?" Board for Certification of Genealogists. *SpringBoard: News and Notes.* (<u>http://bcgcertification.org/blog/2015/09/10-minute-methodology-what-is-reasonably-exhaustive-research/</u>: 3 September 2015).
- Hait, Michael. "What is a 'Reasonably Exhaustive Search'?" Legacy Family Tree Webinars, 12 September 2012. Subscription, <u>http://www.familytreewebinars.com/</u>
- Jones, Thomas W. "When Enough is Enough: How Much Searching is 'Reasonably Exhaustive'?" *Association of Professional Genealogists Quarterly* 25 (March 2010): 25.
- Russell, Judy. "DNA and the Reasonably Exhaustive Search." *OnBoard* 20 (January 2014):1-2, 7. Online, <u>http://www.bcgcertification.org/skillbuilders/skbld141.html</u>
- Sayre, Pamela. "Enough is Enough. Or Is It?" BCG Webinar, 7 October 2016. Online, http://familytreewebinars.com/download.php?webinar_id=499

GPS #2: Source Citations

- Jones, Thomas W. "Mastering the Art of Genealogical Documentation." Course. Genealogical Research Institute of Pittsburgh. (<u>http://www.gripitt.org/courses/june-2016-courses/2016-june-mastering-genealogical-documentation/</u>)
- Mills, Elizabeth Shown. "Fundamentals of Citation" chapter 2 in *Evidence Explained: Citing History Sources from Artifacts to Cyberspace.* (ref. #12)
- ———. "Documentation and the Research Report." Board for Certification of Genealogists. *SpringBoard: News and Notes.* (<u>http://bcgcertification.org/blog/2016/01/ten-minute-methodology-documentation-and-the-research-report/</u>: 21 January 2016).
- ———. Evidence Explained Forums. *EvidenceExplained.com.* (<u>https://www.evidenceexplained.com/forums/evidence-explained</u>). This is a place to ask questions and discuss citation questions.
- ———. QuickLessons. *EvidenceExplained.com.* <u>https://www.evidenceexplained.com/tags/quicklesson</u>. These QuickLessons share excellent examples of working with citations. See QuickLesson numbers 3, 4, 19, 21 and 22.

GPS #3: Analysis and Correlation of Evidence

- Anderson, Robert Charles. *Elements of Genealogical Analysis.* Boston: New England Historic Genealogical Society, 2014.
- Bittner, F. Warren. "Complex Evidence What it is, How it Works, Why it Matters." BCG webinar, <u>http://bcgcertification.org/blog/bcg-</u> webinars/#BittnerFeb2015



- Devine, Donn. "Evidence Analysis," chapter 17 in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers and Librarians.* (ref. #13)
 Note: This chapter was written before the new Evidence Process Map came out (see the 2015 edition of *Evidence Explained* for the map), but the principles are still sound.
- Evans, Stefani. "Data Analysis," *OnBoard 18* (May 2012): 13-14. Online, http://bcgcertification.org/skillbuilders/skbld135.html
- ——— . "Evidence Correlation," *OnBoard* 18 (September 2012): 21-23. Online, http://bcgcertification.org/skillbuilders/skbld129.html
- Jones, Thomas W. "Using 'Correlation' to Reveal Facts that No Record States." Recorded presentation for FamilySearch. Online, <u>https://familysearch.org/learningcenter/lesson/using-correlation-to-reveal-facts-that-no-record-states/589</u>
- Mills, Elizabeth Shown. "Fundamentals of Evidence Analysis" chapter 1 in *Evidence Explained: Citing History Sources from Artifacts to Cyberspace.* (ref. #12)

GPS #4: Resolution of Conflicts

 Henderson, Harold Henderson. "How to Handle Conflicting Evidence: A Six-Step Program." Archives.com Learn from Experts Series, 8 October 2013. <u>http://www.archives.com/experts/henderson-harold/how-to-handle-conflicting-evidence.html</u>

- Jones, Thomas W. "GPS Element 4: Resolving Conflicts and Assembling Evidence." Chapter 6 in *Mastering Genealogical Proof.* Arlington, Virginia: National Genealogical Society, 2013.
- Russell, Judy. "When Worlds Collide: Resolving Conflicts in Genealogical Records." BCG webinar, <u>http://familytreewebinars.com/download.php?webinar_id=502</u>

GPS #5: A Written Conclusion

- Johnson, Melissa A. "The Proof is in the Writing." *NGS Monthly.* 10 March 2015. Online, <u>http://ngsmonthly.ngsgenealogy.org/the-proof-is-in-the-writing/</u>
- Jones, Thomas W. "GPS Element 5: The Written Conclusion." Chapter 6 in *Mastering Genealogical Proof*. Arlington, Virginia: National Genealogical Society, 2013.
- Sayre, Pamela Boyer. "Effective Writing and Editing." *OnBoard* 16 (September 2010): 21-22. Online, <u>http://www.bcgcertification.org/skillbuilders/skbld109.html</u>

The BCG Portfolio: Element by Element

Transcripts and Abstracts

- Test your transcription and abstraction skills using the sample documents on the "Skillbuilding" page of the BCG website http://www.bcgcertification.org/skillbuilders/docsamples.html
- Bell, Mary McCampbell. "Transcripts and Abstracts." Chapter 16 in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians.* (ref. #13)

Research Planning

- Jones, Thomas W. "Focused Versus Diffuse Research," *OnBoard* 17 (September 2011):17-18. http://www.bcgcertification.org/skillbuilders/skbld911.html
- Leary, Helen F.M. "Problem Analysis and Research Plans." Chapter 14 in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians.* (ref. #13)

Research Reports

- Jones. Thomas W. "Client Reports: Dos, Don'ts, and Maybes." Association of Professional Genealogists webinar. Available to APG members on the members portion of the website. <u>https://www.apgen.org/members/professionaldev/webinars.html</u>
- Mills, Elizabeth Shown. "Research Reports," chapter 18 in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians.* (ref. #13)
- ———. "QuickLesson 20: Research Reports for Research Success," 23 May 2015. *Evidence Explained: Historical Analysis, Citation & Source Usage,* website (<u>https://www.evidenceexplained.com/content/quicklesson-20-research-reports-research-success</u>)
- ———. Sample research reports. *Historic Pathways.* Website. <u>https://historicpathways.com/researchreports.html</u>



Writing Proof Arguments / Case Studies

- Bittner, Warren. "Proof Arguments How to Write Them and Why They Matter." Legacy Family Tree webinar. Online, http://familytreewebinars.com/download.php?webinar_id=402
- Bloom, Jeanne Lazalere. "The Family Tapestry: Integrating Proof Arguments into the Genealogical Narrative." BCG webinar, http://bcgcertification.org/blog/bcg-webinars/#BloomMay2015
- DeGrazia, Laura A. "Proof Arguments." *OnBoard* 15 (January 2009): 1-3. <u>http://www.bcgcertification.org/skillbuilders/skbld091.html</u>
- Fox, Judy Kellar. "Ten Minute Methodology" series. Board for Certification of Genealogists. *SpringBoard: News and Notes.* Online, <u>http://bcgcertification.org/blog/ten-minute-methodology/</u>.
- Hait, Michael. "Writing Logical Proof Arguments." Virtual Institute of Genealogical Research, online course. <u>http://vigrgenealogy.com/store/hait-proof-arguments/</u>
- Little, Barbara Vines. "It's Not That Hard to Write Proof Arguments," *OnBoard* 15 (September 2009): 20-23. <u>http://www.bcgcertification.org/skillbuilders/skbld099.html</u>
- Mills, Elizabeth Shown. "Proof Arguments and Case Studies," chapter 16 *Professional Genealogy:* A Manual for Researchers, Writers, Editors, Lecturers, and Librarians. (ref. #13)

Kinship Determination

- Bloom, Jeanne Lazalere. "The Family Tapestry: Integrating Proof Arguments into the Genealogical Narrative." BCG Webinar on Legacy Family Tree Webinars, <u>http://familytreewebinars.com/download.php?webinar_id=487</u>
- Clunies, Sandra MacLean. "Writing the Family History: Creative Concepts for a Lasting Legacy." *National Genealogical Society Quarterly* 88 (December 2000): 247-265.
- Curran, Crane and Wray. *Numbering Your Genealogy: Basic Systems, Complex Families, and International Kin.* (ref. #4)
- Russell, Judy. "Kinship Determination: From Generation to Generation." BCG Webinar on Legacy Family Tree Webinars, <u>http://familytreewebinars.com/download.php?webinar_id=490</u>
- Rose, Christine, "Family Histories" Chapter 23 in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians*. (ref. #13)

Continuing Education

Education is not only important while preparing an initial portfolio for certification, but continuing education is a requirement for all BCG associates as they apply for recertification every five years. *The BCG Application Guide* gives instructions for renewing associates to:

"List the genealogy-related activities that helped you prepare for certification and in a sentence or two discuss each activity's relationship to updating or expanding your (a) research, analysis, reporting, and/or problem-resolution abilities; (b) understanding of current standards; (c) background knowledge about geographic areas, time periods, or subjects with which you normally work; and—if applicable—(d) your recognition of educational or technological advances in the field." (Ref. # 2, page 15).

References for Further Study

Books

- 1. Anderson, Robert Charles. *Elements of Genealogical Analysis.* Boston: New England Historic Genealogical Society, 2014.
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- 3. Board for Certification of Genealogists. *Genealogy Standards.* 50th-anniversary edition. Nashville, Tennessee: Ancestry, 2014.
- 4. Curran, Joan F., Madilyn Coen Crane, and John H. Wray. *Numbering Your Genealogy: Basic Systems, Complex Families, and International Kin.* Revised Edition. Arlington: National Genealogical Society, 2008.
- 5. Frelich, Kay Haviland and William B. Frelich. *Genealogy and the Law: A Guide to Legal Sources for the Family Historian.* Arlington, Virginia: The National Genealogical Society, 2014.
- 6. Greenwood, Val. *The Researcher's Guide to American Genealogy.* 3rd Edition. Baltimore, MD: Genealogical Publishing Co., 2000.
- 7. Hatcher, Patricia Law. *Producing a Quality Family History*. Salt Lake City: Ancestry, 1996, and Kindle Edition, 2013.
- 8. Jones, Thomas W. *Mastering Genealogical Proof.* Arlington, Virginia: The National Genealogical Society, 2013.
- 9. Leary, Helen, editor. *North Carolina Research: Genealogy and Local History.* Raleigh, N.C.: North Carolina Genealogical Society, 1980.
- 10. LeClerc, Michael J., and Henry B. Hoff, editors. *Genealogical Writing in the 21st Century: A Guide to Register Style and More*. 2d ed. Boston: New England Historic Genealogical Society, 2007.
- 11. Merriman, Brenda Dougall. *Genealogical Standards of Evidence: A Guide for Family Historians.* Toronto: Ontario Genealogical Society, 2010.
- 12. Mills, Elizabeth Shown Evidence Explained: Citing History Sources from Artifacts to Cyberspace. 3rd Edition. Baltimore, MD: Genealogical Publishing Co., 2015. Study chapter 1 on "Fundamentals of Evidence Analysis" and chapter 2 on "Fundamentals of Citation." Electronic edition available at <u>https://www.evidenceexplained.com/magento/</u>
- 13. ———. Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers and Librarians. Baltimore, MD: Genealogical Publishing Co., 2001.
- 14. ———. "Quicksheet: Genealogical Problem Analysis: A Strategic Plan." Baltimore, MD: Genealogical Publishing Co., 2010.
- 15. ———. "Quicksheet: The Historical Biographer's Guide to the Research Process." Baltimore, MD: Genealogical Publishing Co., 2012.
- 16. Rising, Marsha Hoffman. *The Family Tree Problem Solver*. Cincinnati, Ohio: Family Tree Books, 2011.
- 17. Rose, Christine. *Genealogical Proof Standard: Building a Solid Case*. 4th revised edition. San José, California: CR Publications, 2014.
- 18. Stratton, Penny and Henry B. Hoff. *Guide to Genealogical Writing: How to Write and Publish Your Family History.* Boston: Mass., New England Historic Genealogical Society, 2014.
- 19. Szucs, Loretto D., and Sandra Hargreaves Luebking, editors. *The Source: A Guidebook of American Genealogy*. 3rd edition. Salt Lake City: Ancestry, 2006.

Articles/Brochures

Case studies are published in every edition of the *NGS Quarterly*, the journal of the National Genealogical Society. See <u>http://www.ngsgenealogy.org/cs/ngsq</u> Members of NGS can access the *NGSQ* archives at http://www.ngsgenealogy.org/cs/members_only

BCG Skillbuilding articles published in *OnBoard*, the educational newsletter of the BCG. Many are available online at <u>http://www.bcgcertification.org/skillbuilders/index.html</u>

- 20. Board for Certification of Genealogists. "Meeting Continuing Education Standards." *OnBoard* 21 (May 2015): 14-15.
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- 27. ———. "The Genealogical Proof Standard: How Simple Can It Be?" *OnBoard* 16 (September 2010):17-18, 20.
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(http://bcgcertification.org/blog/2016/01/ten-minute-methodology-documentation-and-theresearch-report/ : 21 January 2016).

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Courses

37. Boston University, Certificate in Genealogical Research http://professional.bu.edu/programs/genealogy/ 38. Genealogical Institute of Pittsburg (GRIP) www.gripitt.org Mastering the Art of Genealogical Documentation - Thomas W. Jones Advanced Research Methods - Thomas W. Jones Confusion to Conclusion: How to Write Proof Arguments - Henderson and Powell Writing and Sharing Family History – Michael Leclerc 39. Institute of Genealogy and Historical Research (IGHR) http://samford.libguides.com/ighr/ighr-future Use the Samford link for 2017 courses until the new website is available through the Georgia Genealogy Society <u>http://www.gagensociety.org/</u> Advanced Methodology & Evidence Analysis – Judy Russell Writing and Publishing for Genealogists – Thomas W. Jones 40. Salt Lake Institute of Genealogy (SLIG) http://slig.ugagenealogy.org Advanced Genealogical Methods – Thomas W. Jones Advanced Evidence Analysis Practicum - Angela Packer McGhie You be the Judge: A Practicum in Using Standards to Evaluate Genealogical Work -Jeanne Larzalere Bloom 41. Virtual Institute of Genealogical Research http://vigrgenealogy.com/ Genealogical Evidence and Proof - F. Warren Bittner Writing Logical Proof Arguments - Michael Hait

Webinars and Other Resources

- 42. Bloom, Jeanne Larzalere. "The Family Tapestry: Integrating Proof Arguments into the Genealogical Narrative." BCG webinar, <u>http://bcgcertification.org/blog/bcgwebinars/#BloomMay2015</u>
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 There are 22 QuickLessons on a variety of topics related to certification.
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