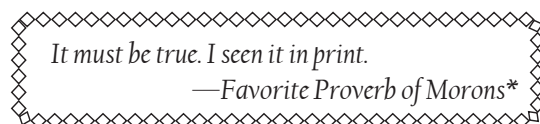


New Standards or Old? Guidelines for Effective Research and Family Histories

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| Why Standards? | <ul style="list-style-type: none">✓ Genealogy standards are sensible and practical guidelines that successful practitioners routinely implement.✓ Standards-based research is more efficient than substandard research.✓ Following standards increases the chances of achieving accurate and long-standing results.✓ Genealogy standards provide guidelines for documenting, planning, researching, reasoning, writing, teaching, and continuing education.✓ Standards provide a paradigm for assessing research results. |
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| Why Revised Standards? | <ul style="list-style-type: none">✓ Advancements and new understandings of genealogical methods and products.✓ New tools and technologies for genealogists✓ Increased clarification of the standards' wording✓ Reorganization to reduce repetition and overlap and to group related standards together.✓ Separation of standards and definitions. |
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| The 2014
Genealogy Standards
Manual | <ul style="list-style-type: none">✓ 83 standards replace 72✓ Fewer multipart standards✓ New and more-detailed categorization of standards✓ Titles for each standard✓ References to examples of work that meets standards (rather than fictitious examples in an appendix)✓ Resulted from an open collaborative process with public input |
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*Quotation from Donald Lines Jacobus, *Genealogy as Pastime and Profession* (1936; rev. 2nd ed., Baltimore: Genealogical Publishing Co., 1968), 69.

Comparison/Conversion of 2000 and 2014 Genealogy Standards

Comparison chart created by Alison Hare and Thomas W. Jones and used here with permission of the creators and the Board for Certification of Genealogists.

2014 STANDARDS		2000 STANDARDS	
CATEGORY	NUMBER AND DESCRIPTOR	NUMBER AND CATEGORY	
STANDARDS for DOCUMENTING	1. Scope 2. Specificity 3. Purposes 4. Citation uses 5. Citation elements 6. Format 7. Shortcuts 8. Separation safeguards	8 and 17, Data-Collection Standards 36, 49, and 53, Compilation Standards 67, Standards for Writers	
	STANDARDS for RESEARCHING: PLANNING RESEARCH	9. Planned research 10. Effective research questions	5, Data-Collection Standards 37, Compilation Standards
		11. Sound basis	5, Data-Collection Standards 37, 55, Compilation Standards
		12. Broad context	5, Data-Collection Standards 19, Evidence-Evaluation Standards 37, Compilation Standards
		13. Source-based content	5, Data-Collection Standards 37, Compilation Standards
		14. Topical breadth	5, Data-Collection Standards 19, Evidence-Evaluation Standards 37, Compilation Standards
		15. Efficient sequence 16. Flexibility	5, Data-Collection Standards 37, Compilation Standards
		17. Extent	5, Data-Collection Standards 19, Evidence-Evaluation Standards 37, Compilation Standards
18. Terminating the plan		5, Data-Collection Standards 37, Compilation Standards	
STANDARDS for RESEARCHING: COLLECTING DATA	19. Data-collection scope	19, Evidence-Evaluation Standards	
	20. Careful handling	1, Data-Collection Standards	
	21. Respect for source caretakers	2, Data-Collection Standards	
	22. Using others' work	3–4, Data-Collection Standards	
	23. Reading handwriting 24. Understanding meanings 25. Note-taking content 26. Distinction between content & comments	6, Data-Collection Standards	
	27. Note-taking objectivity	7, Data-Collection Standards	
	28. Images and printouts	9–10, Data-Collection Standards	
	29. Transcriptions	11–12, Data-Collection Standards	
	30. Abstracts	14, Data-Collection Standards	

2014 STANDARDS		2000 STANDARDS
CATEGORY	NUMBER AND DESCRIPTOR	NUMBER AND CATEGORY
COLLECTING DATA, CONTINUED	31. Quotations	13, Data-Collection Standards
	32. Transcribing, abstracting, and quoting principles	11–14, Data-Collection Standards
	33. Paraphrases and summaries	15–16, Data-Collection Standards
	34. Agents	18, Data-Collection Standards
	35. Source analysis	21, Evidence-Evaluation
	36. Information analysis	22, Evidence-Evaluation
STANDARDS FOR RESEARCHING: REASONING FROM EVIDENCE	37. Sources, information, and evidence	21–22 and 29, Evidence-Evaluation
	38. Source preference	21, Evidence-Evaluation
	39. Information preference	22, Evidence-Evaluation
	40. Evidence mining	20 and 29–30, Evidence-Evaluation
	41. Evidence scope	19 and 24, Evidence-Evaluation
	42. Evidence discrimination	25 and 41–42, Evidence-Evaluation
	43. Evidence integrity	25, Evidence-Evaluation
	44. Evidence reliability	
	45. Assumptions	28, Evidence-Evaluation
	46. Evidence independence	33, Evidence-Evaluation
	47. Evidence correlation	20 and 27, Evidence-Evaluation
48. Resolving evidence inconsistencies 49. Unresolved evidence inconsistencies	23 and 34, Evidence-Evaluation	
50. Assembling conclusions from evidence	26, Evidence-Evaluation 43, 50 and 56, Compilation Standards	
STANDARDS FOR WRITING: GENEALOGICAL PROOFS	51. Research scope	19, Evidence-Evaluation
	52. Proved conclusions	43, 44–48, 50, 56, Compilation Standards 70, Standards for Writers
	53. Selection of appropriate options	
	54. Logical organization	
STANDARDS FOR WRITING: ASSEMBLED RESEARCH RESULTS	55. Integrity and ownership	
	56. Honesty	47, Compilation Standards
	57. Background information	41, 43 and 48, Compilation Standards
	58. Content	42, Compilation Standards
	59. Proofs included	44–48, Compilation Standards
	60. Overall format	40, Compilation Standards
	61. Structure	35, 40, 45, Compilation Standards
	62. Clear writing	35, Compilation Standards
	63. Technically correct writing	67, Standards for Writers
	64. Cross referencing	38, Compilation Standards
	65. Genealogical formats	52, Compilation Standards
66. Biographical information	51, Compilation Standards	

2014 STANDARDS		2000 STANDARDS	
CATEGORY	NUMBER AND DESCRIPTOR	NUMBER AND CATEGORY	
STANDARDS FOR WRITING: SPECIAL-USE GENEALOGICAL PRODUCTS	67. Reports	37–40, Compilation Standards	
	68. Lineage-society applications	54 Compilation Standards	
	69. Source guides	68, Standards for Writers	
	70. Methodology guides	69, Standards for Writers	
	71. Compiled abstracts	14, Data-Collection Standards	
	72. Reviews	71, Standards for Writers	
	73. Database programs	72, Standards for Writers	
STANDARDS FOR GENEALOGICAL EDUCATORS: LECTURERS AND INSTRUCTORS	74. Planned outcomes 75. Content titles 76. Enhancements 77. Bibliographies 78. Presentation style 79. Ownership	57–60, Standards for Lecturers 61–66, Standards for Instructors	
	80. Course design 81. Student evaluation	61–66, Standards for Instructors	
	STANDARDS FOR CONTINUING EDUCATION	82. Development goals	74, Standards for Continuing Education
		83. Regular engagement	73, Standards for Continuing Education

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