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How Does Artificial Intelligence Impact Genealogy?

By David Ouimette CG, CGL

Editor's Note: OnBoard seeks to share articles of interest to BCG's associates and on-the-clock applicants. David Ouimette's article discusses artificial intelligence (AI)—a cutting edge, technological tool recently becoming more readily available for multiple uses by genealogists. David raises important possibilities, challenges, and cautions present in the developing use of AI by the genealogical community. As of the publication of this OnBoard issue, however, the BCG Trustees have established no official position on the use of AI in genealogy. As always, genealogists are urged to attend to the Genealogy Standards and the Code of Ethics in all aspects of their work.

The availability of powerful computational resources and the development of large language models trained on massive datasets have given rise to generative artificial intelligence (AI)—computer systems that can communicate like humans. These large language models, or chatbots, such as Anthropic's Claude, Google's Gemini, Microsoft Copilot, and Open AI's ChatGPT, can respond to questions or prompts in novel and intelligent ways that seem human. When asked, ChatGPT stated that its goal is "to create algorithms or models capable of generating new, realistic data or content that is indistinguishable from data or content created by humans." Claude opined that its objective is "to act as an unbounded creative engine, capable of designing, composing, and generating all kinds of original content, just as intelligent beings do." Generative AI has disrupted workflows in many business sectors and research fields, including genealogy.

Transformative Technology

Remember when microfilms provided the most convenient access to archival records?

Over the past twenty years, online content has supplanted microfilm. Now, generative AI launches genealogy into a new age with full-text search of handwritten document images on FamilySearch, historical photo colorization and dating on MyHeritage, and AI-powered DNA ethnicity estimates and cousin matching on Ancestry.com.

That's just the beginning, as AI can help with most aspects of family history research.

Generative AI acts on electronic text, images, audio, and video input in several ways. AI can transcribe or summarize text, extract specific information items, translate from one language or style to another, recognize and describe patterns, highlight factual inconsistencies, or otherwise elaborate on input as requested. AI empowers the savvy genealogist willing to exploit these capabilities.

AI Cognitive Agents

Can a chatbot act knowledgeably and effectively as a research assistant? Chetan Dube, founder and CEO of Amelia—a conversational AI platform—predicts that "the integration of generative AI into everyday devices will make AI more personal and responsive. We are on the brink of an AI cognitive agent revolution."¹

AI can act as an agent or research assistant helping the genealogist with each component of the Genealogical Proof Standard. Consider what Standard 34 says about employing agents: "Genealogists may use agents to find and examine sources" or "provide information potentially relevant to a research question."² An agent need not be a human; it could be an AI cognitive agent.

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How AI Impacts Genealogy

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Thorough Research

Genealogists will do more thorough research as generative AI transcribes additional records. AI trained to read handwriting in several languages (Standards 23 and 29) facilitates reasonably exhaustive research via full-text search. FamilySearch has converted hundreds of millions of handwritten images to full transcripts. A recent RootsTech video showcased full-text search of “U.S. Land and Probate Records” and “Mexico Notary Records” on FamilySearch Labs.³ Over the next few years, FamilySearch will transcribe the majority of its historical images.

Chatbots like Claude, Gemini, Copilot, and ChatGPT can help you develop research plans (Standard 9). For example, when prompted with “My immigrant ancestor was born somewhere in Quebec about 1905 and arrived in Vermont about 1825. What records can I use to identify his birthplace,” Claude produced a research plan, recommending eight record types, explaining the value of each, and suggesting a methodical approach to pursue. AI can also help you ask effective research questions (Standard 10), pivot your research (Standard 16), or expand the scope of your research (Standard 17).

Accurate Citations

Generative AI understands more than spelling and grammar. Ask a chatbot to find unique facts in your writing that need sources cited (Standard 1). With access to necessary citation elements (Standard 5) and adequate training on citation formats (Standard 6), AI can even help produce accurate source citations. With the addition of image links, full transcripts, and AI-generated rectangles highlighting names, dates, places, and relationships identified in images, citations will point not only to sources but to key information items embedded in the source.

Evidence Analysis

AI can analyze evidence in countless ways.

Standard 23 states that “Genealogists correctly read all legible handwriting in materials they consult.”⁴ AI can expedite transcription and often decipher words illegible to mere mortals.

You can find an ancestor’s will transcribed by FamilySearch’s AI engine, then copy and paste the computer-generated text into Copilot, asking it to describe each person named in the will. Copilot will identify the people, note their roles, and perhaps add a document summary. (Standards 24 and 33).

MyHeritage can accurately date historical photographs based on training date from millions of old photos. Who would have thought that a wedding photo would provide evidence for a marriage date?

As with any research assistant, AI makes mistakes. Responding to the prompt, “Newell White was a French-Canadian immigrant who spoke French and lived in Vermont in the 1830s. What might have been his surname at the time of birth?,” Gemini stated incorrectly that “French-Canadian surnames followed a patronymic naming system.” However, ChatGPT astutely observed that the birth surname might have been Leblanc or Blanchard.

Evidence Correlation

You can engage chatbots to examine information items for inconsistencies, but beware of the results. For example, ChatGPT was prompted: “Analyze the following sentence and highlight any conflicting information: Alexander married Mary on 15 March 1859; Alexander and Mary were parents of three sons: Samuel who was born 15 July 1859, Ephraim who was born 15 November 1863, and Ebenezer who was born 15 March 1864.” The chatbot explained thoroughly and erroneously how all the

stated facts were consistent. Only when ChatGPT was questioned explicitly about the proximity of these dates did it concede that there were conflicts, but it took additional coaxing.

You can give generative AI systems tables of data to correlate. When provided a table of calculated birth years from ages and age ranges extracted from specific sources, ChatGPT correctly interpreted each row and correlated all the evidence, making a solid argument about the consistency and quality of evidence found in documents most proximate to the date of birth. Sound reasoning supported the appropriate conclusion.

Conflict Resolution

After you ask a chatbot to correlate evidence items, you can ask it to highlight and then resolve conflicting evidence. AI systems like ChatGPT have been trained enough to give meaningful responses in many reasonable situations. In the earlier example of correlated birth years from multiple documents, ChatGPT offered five explanations: “margin of error,” “guesswork of the informant,” “transcription errors,” “age calculation based on the person’s appearance,” and “cultural or linguistic differences.” AI can become a useful research assistant if guided with the right line of questions.

Persuasive Conclusions

A genealogical proof requires a “soundly reasoned, coherently written conclusion.”⁵ Persuasive proof arguments require carefully constructed hypotheses, logical sequences, and clear rationale that AI can help produce or refine. You can give a chatbot a draft of all or a portion of your proof argument for editorial review. AI can point out errors in logic and suggest edits to improve the consistency of language, tone, and style.

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Considerations and Caveats

AI comes in two forms: Artificial Intelligence and Artificial Ignorance. Both can get you in trouble. Artificial Intelligence does not obey any particular code of ethics and may plagiarize. Artificial Ignorance may generate false or biased responses and do so persuasively. Remember these caveats when using generative AI as a research assistant. Learn how to transcend current deficiencies in these tools, as they have much to offer.

AI systems may reflect any bias and toxicity inherent in their training data (Standard 63). They might also plagiarize liberally (Standard 22). Their results often can contain false information, some instances more subtle than others. Any genealogical work product of an AI agent must be carefully scrutinized before incorporation into your research.

Hopeful Future

When asked to “generate a sonnet in the style of William Shakespeare about the joy of doing family research,” ChatGPT penned these original verses:

Upon the parchment, tales of old are spun,
In dusty tomes, where history's whispers hide,
Where ancestors, like stars, their paths have run,
Their legacy, in shadows, does abide.

With quill in hand, I trace each fading line,
Through ages past, their journeys I pursue,
In quest for roots, a lineage divine,
Each name a gem, each story ever true.

Oh, what delight, to unearth secrets deep,
To resurrect the echoes of the past,
In every record, precious treasures keep,
Their lives within my grasp, forever cast.

For in the search, a bond with kin is found,
As through their tales, our own souls are wound.

Endnotes

1. Benson Mawira, “Generative Artificial Intelligence Set to Transform Global Business Landscape in 2024,” *Cryptopolitan* (<https://www.cryptopolitan.com/generative-ai-on-global-business-landscape/> : posted 14 December 2023), paragraph 8.
2. Board for Certification of Genealogists (BCG), *Genealogy Standards*, 2nd ed. Rev. (Nashville: Ancestry.com, 2021), 21.
3. FamilySearch Support Content Development Team, “Unlock the Power of Full-Text Searching for Historical Records” (2024); webinar, *RootsTech* (<https://www.familysearch.org/en/rootstech/session/unlock-the-power-of-full-text-searching-for-historical-records> : accessed 25 March 2024).
4. BCG, *Genealogy Standards*, 17.
5. Ibid., 3.

BCG Education Fund

The BCG Education Fund awarded the memorial 2023 Debbie Parker Wayne scholarship to Shannon Wood Byers. This scholarship guarantees Shannon a seat at the spring Putting Skills to Work workshop, which is offered in connection with this year's virtual National Genealogical Society Family History Conference. The workshop features Sharon Hoyt, CG, presenting “Organizing and Analyzing Evidence for Genealogical Success” and Jan Joyce, DBA, CG, CGL, AG leading “Deconstruct to Reconstruct: Writing Proof Arguments for Maximum Impact.”

The spring workshop is sold out, but registration for the fall virtual Putting Skills to Work workshop will open later this year. Karen Stanbary, MA, LCSW, CG, will help students master DNA

standards and write about DNA results. The half-day workshop will run twice, once on Tuesday, 12 November, and again on Saturday, 16 November.

In February, the Education Fund welcomed Jari Honora, CG, and Jenny Rizzo Irwin, CG, at our spring Journeys to Certification conversation. Consider subscribing to the BCG Education Fund mailing list to be the first to know about future events. The link to subscribe can be found just above the green BCG logo on our homepage: <https://bcgedfund.org>.

Colonial Virginia researchers are encouraged to apply for the Donald Mosher Memorial Award, which recognizes current colonial Virginia research published within the past twelve months or intended for future publication. To learn more about the requirements, visit <https://bcgedfund.org/mosher-award>.

Upcoming Webinars

- 21 May 2024: “Editing your Own Writing: Part I,” Thomas W. Jones, CG, CGG
- 18 June 2024: “Editing your Own Writing: Part II,” Thomas W. Jones, CG, CGG
- 16 July 2024: “Oral Genealogy in Asia-Pacific: The Essence of Personal Identity and Tribal Connections,” David S. Ouimette, CG, CGL
- 20 August 2024: “He Had a Brother Who Disappeared: Finding John H. Hickey, Formerly of Rockton, Winnebago County, Illinois,” Debra S. Mieszala, CG
- 17 September 2024: “A Myriad of Slavery Databases,” LaBrenda Garrett-Nelson, CG, CGL
- 15 October 2024, “Sense and Sensibility: The Power of Logic, Intuition, and Critical Thinking,” Robbie Johnson, CG

Top Ten Questions about the BCG Pilot Program

By Jan Joyce, DBA, CG, CGL, AG

In February of this year, BCG announced the launch of a pilot program that divides the application process into multiple parts. The pilot program period, now active, remains in place through 31 December 2024 for any new applicant submissions. During this time, an applicant may choose the current process or the pilot process to apply for certification.

The current process is comprised of two parts: (1) the Preliminary Application and (2) these six elements: Code of Ethics, Development Activities, Document Work, Research Report, Case Study, and Kinship-Determination Project. The pilot program is comprised of three parts: (1) the Preliminary Application, (2) Code of Ethics, Development Activities, Document Work, and Kinship-Determination Project, and (3) an updated Code of Ethics, Research Report, and Case Study. In essence, the pilot program splits the current process with little change other than adding an updated code of ethics. Figure 1 to the right compares the two processes.

By testing a new Process, BCG hopes to learn if the revised program is more approachable. Allowing the submission in multiple parts may motivate some applicants to seek the credential in general or earlier in their journey. Now, let's get to our countdown of the top ten questions about this new pilot program.

#10: How do I opt in to the pilot program?

A: Any applicant who is interested may submit parts 1 and 2 of the portfolio to take part in the pilot program. If you have already submitted Part 1 (the Preliminary Application) then submit Part 2 before 31 December 2024 when the pilot is scheduled to conclude. Part 2 is comprised of a brief application form, Development Activities, Document Work, and the Kinship-Determination Project.

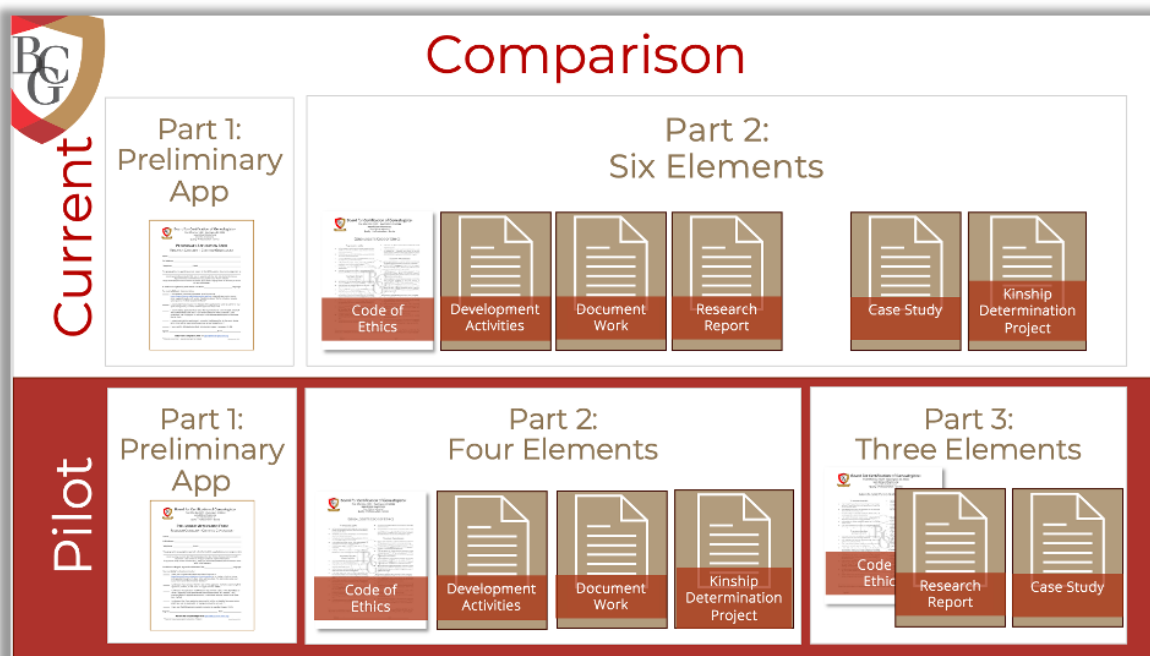
not impacted; all of the elements remain the same.

#8: Can I split the 150 total portfolio page limit any way I want between parts 2 and 3?

A: No. Parts 2 and 3 may each only have 75 pages maximum. Also, the page limit is not considered a target. Many successful portfolios have a page count well below the maximum allowed.

#7: May I select which elements to submit for Part 2 and then submit the remaining ones for Part 3?

Figure 1



#9: Why has BCG created this pilot program?

A: By splitting the portfolio submission into three parts, the process may seem more accessible for some prospective applicants. BCG wants to encourage prepared applicants to submit their portfolios. The rigor of the program is

A: No. The pilot program does not support this approach. Part 2 must be comprised of its Application Form, Code of Ethics, Development Activities, Document Work, and the Kinship-Determination Project. After receiving feedback from BCG that Part 2 is sufficient, you may then submit Part 3, which is comprised of its Application Form, Code of Ethics, Research Report, and Case Study.

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BCG Pilot Program*continued from page 12***#6: What happens after 31 December 2024? Does the pilot program cease to exist?**

A: This will be determined later. BCG will determine if the pilot program should be extended, adopted, or eliminated. If extended or adopted, some adjustments might be made to the program as deemed necessary.

#5: Development Activities are submitted as an element in Part 2. If I undertake any educational opportunities between my Part 2 and Part 3 submissions, how will BCG know about these?

A: Applicants will not update the Development Activities element to submit with Part 3. Therefore BCG will not be aware of any additional educational opportunities undertaken between parts 2 and 3. This parallels the current submission process in that at the point in time when an applicant submits a portfolio, BCG is not made aware of additional educational undertakings.

If an applicant receives judge feedback from a sufficient Part 2 submission and wants to partake in any type of education, he or she is welcome to do so. But this information will not be relayed in the Part 3 submission.

#4: I am on the clock and my due date is before the Pilot Program ends on 31 December 2024. If I am not ready to submit Part 2 by my due date, do I need to extend and pay the extension fee so I can submit before 31 December 2024?

A: Yes, if your due date is before 31 December 2024 and you have not submitted Part 2, it will expire. You may either pay the extension fee (recommended) or let it expire and then begin again with Part 1 followed by Part 2.

Here are some additional examples of timing for prospective applicants in different stages of the submission process:

- You have not submitted Part 1—the Preliminary Application. You may submit Part 1 and then Part 2 any time before 31 December 2024.
- If you are already on the clock, having submitted Part 1, and your due date is before 31 December 2024, then you may submit Part 2 by your due date to participate in the pilot program.
- If you are already on the clock, and your due date is before 31 December, but you are not yet ready to submit Part 2, then you may extend for another year. However, to participate in the pilot program, Part 2 must be submitted by 31 December 2024. The pilot program might not be available after 31 December 2024.
- If you are already on the clock, and your due date is after 31 December 2024, then you may submit Part 2 before 31 December 2024 to participate in the pilot program. The pilot program might not be available after 31 December 2024, in which case you might be required to submit the entire portfolio at one time, which is the current process.

#3: If either Part 2 or Part 3 is deemed insufficient by the judges, can I just resubmit that part?

A: No. If BCG judges deem either Part 2 or Part 3 insufficient, applicants will need to restart the process with Part 1. This mirrors the current process and thus retains the overall intent and rigor of the program.

#2. How much time do pilot program participants have after receiving a sufficient review of Part 2 before submitting Part 3?

A: After the applicant submits Part 2, there will be a period during which BCG judges review it. If Part 2 is deemed sufficient, the applicant has one year from that date to submit Part 3. If the applicant cannot submit Part 3 within a year, a one-time extension of a year is allowed. Thus, in total, the applicant may take up to two years to submit Part 3. If the applicant does not submit Part 3 within two years, the process must begin again with Part 1.

#1: Timing—I'm on the clock. Do I opt in now? Does it change my due date?

A: If you are on the clock now, you have completed Part 1 (the Preliminary Application). If you want to participate in the pilot program, email the BCG Executive Director at office@bcgcertification.org and ask for the Part 2 Application Form. Then pay the \$150 application fee through the BCG online shop here: <https://bcgcertification.org/shop/>.

If our Top Ten Questions didn't address one of yours, we are sure that the following resources will. Please check out the pilot program webpage and application guide. If either of those don't answer your questions, you may email the BCG Executive Director.

- Check out the BCG pilot program webpage: <https://bcgcertification.org/pilot/>.
- Review the Pilot Program Application Guide: <https://bcgcertification.org/wp-content/uploads/2024/02/PilotAppGuide.rev23Feb2024.pdf>.

BCG Launches New Certified Genetic Genealogist Credential

By Scott Wilds, CG¹

On 1 March 2024, BCG began taking applications from board-certified genealogists for its new Certified Genetic Genealogist (CGG) credential. The CGG is an “add-on” credential; applicants must be current Certified Genealogists.

The new credential is the result of a year of study and planning by BCG, which has applied to trademark the term *Certified Genetic Genealogist* and the acronym CGG. BCG’s efforts to develop genetic genealogy standards date back more than five years; *Genealogy Standards* was updated in 2019 to include seven new DNA standards, the product of several years of discussion, drafting, debate, and public input.²

The CGG credential denotes associates who have demonstrated competence in using genetic evidence to solve complex genealogical problems while meeting standards for using DNA evidence. Application requirements include a portfolio with two work samples that meet the Genealogical Proof Standard (GPS). The work samples are evaluated using standards-based rubrics, similar to the way new associate portfolios are evaluated.

Application is by electronic portfolio of no more than 150 pages. Complete applications contain three elements: (1) an application form and signed Genealogist’s Code of Ethics, (2) a narrative outlining the applicant’s development activities specific to using DNA evidence in genealogy, and (3) two work samples that demonstrate skill in using genetic and documentary evidence to reach a genealogical conclusion or address a research question.

Both work samples should demonstrate the ability to solve genealogical problems where DNA evidence is integral to the conclusion. Each work sample should demonstrate application of the GPS, use DNA and documentary evidence to resolve a question of relationship or identity that cannot be proved without genetic evidence, and reflect detailed reasoning that integrates DNA and documentary

evidence into a defensible conclusion. Each work sample should meet applicable genealogy standards, including those detailed in the section “Using DNA Evidence” of *Genealogy Standards* (Standards 51–56)³ and the Code of Ethics.⁴ Submission to BCG of work for credentialing is considered private sharing, not publishing, so Standard 57 does not apply.

A specific format for work samples is not required. A stand-alone proof argument, a formal case study, and a research report completed for a client or to file may be good choices. A research report may reach intermediate conclusions and outline further research steps, like a targeted DNA testing plan, or it may articulate why research cannot continue.

To demonstrate broad knowledge, applicants should consider submitting work samples that use more than one kind of DNA test. Only one work sample may address a straightforward case of a living person’s unknown parentage. More complicated cases demonstrate advanced skills.

The CGG application form includes a checklist of fourteen genealogical research contexts that should be attached to each work sample. Each work sample should address one or more of these contexts. The research contexts describe the kinds of complex genealogical problems in which DNA and documentary evidence can resolve questions of identity or relationships. The fourteen research contexts are:

- Genetic evidence and documentary evidence disagree.
- Insufficient documentary evidence, DNA evidence, or both exist to provide any plausible answer to the research question.
- Assembled documentary evi-

dence, DNA evidence, or both suggest more than one equally plausible answer to the research question.

- A person whose identity is in question has an unknown given name, last name, or both.
- People who closely share Y-DNA have different last names.
- One kind of DNA test is insufficient to help answer the research question.
- 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).
- A relationship question, identity question, or both have multiple plausible answers.
- Multiple plausible sources exist for the source of shared DNA.
- The averaged amount of shared atDNA differs significantly from statistical predictions across multiple test takers.
- Misattributed parentage occurs in multiple generations.
- Documentary evidence is limited; for example, where record destruction is extensive, census or vital records are not extant or informative, or records are few.
- Your research question applies to an endogamous community.
- Genetic networks suggest unknown ancestral lines.

Applicants may submit work that has been published or submitted to BCG as part of a renewal or new application portfolio with certain restrictions. The unedited version of previously published material should be submitted, not the published version. A description should be provided or post-submission revisions to work previously submitted to BCG

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New CGG Credential

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based on BCG's or others' feedback. The casual use of DNA likely will not meet the CGG work sample requirements. DNA evidence should be integral to the solution of the research question or problem being addressed in each work sample.

The CGG rubrics will seem familiar to associates. They are based on rubrics for the two elements of the new CG application portfolio that must meet the Genealogical Proof Standard: the case study and the kinship-determination project. CGG rubrics address extent of documentary and genetic evidence, source citations, quality of evidence, analysis, correlation and assembly of evidence, resolution of conflicting evidence, soundness of conclusions based on documentary and DNA evidence, writing and presentation format, and respect for privacy. This sequence tracks the five elements of the GPS: reasonably exhaustive research, complete and accurate source citation, analysis and correlation of evidence that facilitates sound interpretation, resolution of conflicting evidence, and a soundly, coherently written conclusion.

The CGG rubrics are more specific in describing DNA evidence needed to meet Standards 51–56 than are the CG application rubrics. Nearly every CGG rubric includes DNA-specific language. For example, CGG Rubric GG1b (Extent of genetic evidence) for the Meets Standards rating states “the selected DNA tests, test takers, companies, and analytical tools address the genealogical problem. A sufficient number of test takers support genetic relationships and eliminate competing hypotheses.” CGG Rubric GG4 (Analysis, correlation, and assembly of evidence) includes DNA-specific language for the Meets Standards rating: “Valid analytical tools, statistical data, and reasoning sufficiently interpret DNA test results to reach conclusions or intermediate conclusions. All relevant factors to determine a genetic relationship are considered. Alternative hypotheses are convincingly mitigated, addressed,

or eliminated.” The specificity of the CGG rubrics should be valuable in evaluating all genealogical work that includes DNA evidence, not just in evaluating work samples submitted in a CGG application portfolio.

In 2023, the BCG board adjusted fees for new applications for second and third credentials; that is, for CGs applying for the CGL or CGG credential, or those with two credentials applying for a third. The fee for the second credential is now \$225 (formerly \$300), and for the third credential \$150. CGs would therefore pay \$225 to apply for the CGG if they do not also have the CGL, and \$150 if they have both the CG and the CGL.

Language is expected to be proposed at the May BCG board meeting to align CG and CGG renewal dates by extending an associate's five-year CG renewal date to match the CGG renewal date. That is, the successful CGG application is deemed equivalent to a CG renewal, and the CG renewal date would be reset (extended) to be the fifth anniversary of the CGG award.

Specific application requirements are on the BCG website at <https://bcgcertification.org/process/app-guide/>. Application requirements will be incorporated into the next edition of *The BCG Application Guide*. The CGG rubrics link is <https://bcgcertification.org/process/rubrics/>.

Endnotes

1. Scott Wilds, CG, chaired BCG's CGG Implementation Committee. He thanks committee members Melinde Lutz Byrne, Thomas W. Jones, David Ouimette, and Karen Stanbary for their work and notes that many phrases in this article are drawn without quotation marks from the CGG application requirements drafted by the committee and adopted by the board. The committee built on the work of an earlier CGG committee co-chaired by Catherine Desmarais and Jennifer Zinck, with members Jones, Ouimette, Stanbary and Wilds.

2. Board for Certification of Genealogists, *Genealogy Standards*, 2nd ed. (Nashville: Ancestry.com, 2019), xiv–xv, 29–32.

3. Board for Certification of Genealogists, *Genealogy Standards*, 2nd ed. rev. (Nashville: Ancestry.com, 2019), 29–32.

4. *Ibid.*, 49–53.

BCG Announces First Two Certified Genetic Genealogists

The Board for Certification of Genealogists is excited to announce that Thomas W. Jones, PhD, CG, CGG, FASG, FNGS, FUGA, and Karen Stanbary, MA, LCSW, CG, CGG, have successfully met the requirements for Certified Genetic Genealogist (CGG). Tom and Karen are the first two Certified Genealogists to become credentialed as CGGs. Through the CGG application process, they have demonstrated competence in using genetic evidence to solve complex genealogical problems while meeting standards for using DNA evidence.

BCG launched the new CGG credential effective 1 March 2024. Any current Certified Genealogist may submit application materials for the add-on credential. For more information regarding the requirements and application process, please visit BCG's website at <https://bcgcertification.org/process/app-guide/>. BCG's application to register “Certified Genetic Genealogist” and its acronym CGG is pending before the U.S. Trademark and Patent Office.

BCG extends its congratulations to Tom and Karen, and welcomes them as the first two Certified Genetic Genealogists.

President's Corner By Faye Jenkins Stallings, CG

We have been quite busy at BCG implementing the various actions approved by the Board at our last meeting in October. All of our activity has been focused on fulfilling BCG's mission to foster public confidence in genealogy as a respected branch of history by promoting an attainable, uniform standard of competence and ethics.

In February, BCG launched a pilot program that allows the submission of a portfolio in three parts:

- Part 1: The Preliminary Application
- Part 2: Code of Ethics, Development Activities, Document Work, and Kinship-Determination Project
- Part 3: Code of Ethics, Research Report, and Case Study

The pilot program does not change portfolio elements, standards, or rubrics, only the submission timing. The objective of the pilot program is to explore changes that aim to make the process more approachable and encourage more applicants to submit their portfolios. The pilot program runs from March 1 to December 31, 2024. There is no limit to the number of participants, and it is open to both those who are already on the clock as well as those who are not yet on the clock. Multiple town halls have been held to share information regarding the pilot program. Great interest has been expressed. For more information and a video about the pilot program, see <https://bcgcertification.org/pilot/>.

On March 1, BCG announced that it is now accepting applications for the new Certified Genetic Genealogist credential. Given the increased use and benefit of DNA to solve complex genealogical problems, we felt it was in keeping with our mission to ensure that a practitioner's competence in using DNA be independently evaluated. For more information about the credential, see <https://bcgcertification.org/process/application-guide/>.

On another front involving genetic genealogy, because of the increased use of forensic genetic genealogy by law enforcement, various regulatory authorities are evaluating legislation or regulations to be established that impact this field. In some cases, the regulatory authorities are considering how genealogists should be evaluated or licensed. Because BCG is the premiere federally recognized organization for the certification of genealogists, we felt an effort to educate the public regarding BCG was needed. The outcome of this is a whitepaper, "Certification and Standards in the Practice of Forensic Genetic Genealogy," which was prepared by a committee of BCG associates, led by Barbara Jean Mathews and including Melinde Lutz Byrne, LaBrenda Garrett-Nelson, and Mark Wentling. This whitepaper may be viewed at <https://bcgcertification.org/about/>.

BCG recently participated in the RootsTech 2024 conference. Many participants visited the booth and expressed interest in both the pilot program and the launch of the Certified Genetic Genealogist credential. I'd like to extend thanks to our associate, Angela Packer McGhie, who partnered on behalf of BCG with ICAPGen to develop a professional/aspiring professional track at RootsTech, which was well received.

Following through on strategic planning initiatives, two committees have been established:

- The Standards Review Committee, reviewing the Genealogy Standards and proposing changes to the Board;
- The Application Guide Review Committee, reviewing and proposing updates to *The BCG Application Guide*.

Associates were requested in January to submit any recommendations for changes of the *Application Guide*. In Feb-



ruary, a survey was distributed to portfolio judges seeking initial input into possible changes to the standards. Both will be ongoing efforts during the coming months. We appreciated the input that everyone has provided and will provide.

We are always looking for ways to improve our processes. Recently, we instituted a change to allow associates easier access to past issues of *OnBoard*. Instead of going through the BCG Shop to "order" and download past issues, associates can now simply login to the BCG website to find a link, "Associates Only: *OnBoard* Back Issues," on the Associates home page: <https://bcgcertification.org/associates-home-page/associates-only-onboard-back-issues/>. Remember: you have to be logged in to access this benefit for associates only.

Finally, thank you to all the associates who took the time recently to respond to the survey about availability to volunteer with BCG, offering skillsets that benefit the organization. The value of volunteers to nonprofit organization such as BCG is immense. We could not achieve our mission without the passion and drive of our ardent associates. Thank you for your commitment and investment of time.

Please continue to share your ideas about ways in which we can advance BCG's mission by contacting me at president@bcgcertification.org.

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**OnBoard Back Issues
Index Now Available**

An index of articles in back issues of *OnBoard* can be found and downloaded at <https://bcgcertification.org/wp-content/uploads/2024/01/OnBoard-Contents-2024-1.pdf>.

Keywords found in article titles can be searched using the search function of a PDF reader.

Spotlight: Rebecca Whitman Koford, CG, CGL

By Judy G. Russell, JD, CG,

The moral of this story: go ahead—make a baby genealogist angry.

It may just spark a remarkable career.

It wasn't what brought Rebecca Whitman Koford to genealogy in the first place. Credit for that goes to her parents who raised her in Southern California as a voracious reader, and allowed her to read old-style pedigree charts and family group sheets when she was kindergarten age.

"I remember being very young," Rebecca recalled, "and pulling them out from under the bed. Someone had explained that they represented family from a long time ago, and somehow I understood and would stare at the odd names for hours and just think about these people stuck in history with nothing but a name left."

It wasn't much later, after she married, graduated with a degree in business administration from the University of Redlands, had her first child, and moved with her young family from California to Maryland, that she discovered a possible way to remember those people stuck in history.

"I was introduced to the concept of a lineage society (a really foreign thing to me)," she said, and applied for membership in the Daughters of the American Revolution.

She was turned down.

At the time, Rebecca was furious—not with the DAR but with herself and her skill level. Today, looking back from her perspective as BCG's outgoing executive director, she says it was "the best thing that could have happened." She took that frustration and converted it into an enduring passion for genealogical education and excellence.

"I started figuring things out, met really

good genealogists (thank you Shirley Wilcox!), and got together with baby genealogist buddies who wanted to learn like me," she said. One of the first of those research buddies was fellow Maryland resident Angela Packer McGhie. They met at church when their



oldest children were in grade school and teamed up. "We learned together and went places together, including the National Archives in Washington, D.C., back when we had to wait in line for the microfilm readers and look at indexes from an actual book."

Now, Rebecca said she appreciates what she learned from starting her journey with onsite research at archival repositories: "I love online

research, but my experiences offline have made me a much more analytical research who asks questions about what else could be at that building or where records may have been moved."

She took that analytical skill and began taking courses in genealogy, including the NGS American course, the *ProGen* Online Study Group, and two institute courses—Advanced Methodology at the Salt Lake Institute of Genealogy with Thomas W. Jones ("I realized very quickly I was not advanced.") and the National Institute on Genealogical Records, now the Genealogical Research Institute on Federal Records (Gen-Fed), at the National Archives. She started taking pro bono clients, practiced writing reports, volunteered at her local FamilySearch Center, and began speaking and teaching on genealogical topics.

With young children, limited ability to travel, and no virtual options, Rebecca decided her next step was to see just where her skill level was: she decided to

become certified. "I read *The BCG Application Guide* over and over again like it was going to save me from drowning," she recalls. And having never seen a single portfolio in person, she "read every single work sample on the BCG website over and over again and kept re-reading *Professional Genealogy*."

Finally, she said, "I decided I was ready to be told what I was doing wrong, and I was ready to fail and do it again. That was what I was dedicated to. Just doing it right, not necessarily the first time. I wanted the feedback. I had no ego on the table. I just needed to know where to go to learn more."

Her portfolio was accepted, and on 29 May 2013 she received her Certified Genealogist credential, adding the Certified Genealogical Lecturer credential in 2018—the same year she took on the role of BCG Executive Director. It was a major challenge, with a new *Application Guide*, new website, and more digital content, plus the personal challenge of being the public face of BCG with applicants. The major rewards from her six years in the role: "the support from the associates, communicating with them and with those who are excited to be 'on the clock,' and working with the judges."

At the same time, Rebecca has added to her own workload, serving first as administrator and now member of the Board of Directors of the *ProGen* Study Group, Gen-Fed Director, coordinator of the Methods and Sources course at the Institute of Genealogy and Historical Research, and as a regular speaker at national and regional conferences. Going forward, she would like to do more speaking, more client work, and, of course, her own family history, which has "some complicated DNA to work out. I feel like sometimes I'm back in Tom's Advanced Methodology class and I have no idea what I'm doing and it is strangely exhilarating."

What else does the future hold? Where will she be in five years? "Who knows?" she responds with a smile. "You'll probably have to hunt me down at one of the NARA facilities to find out."