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Overcoming Frustrations: Perspectives on Citations

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Complete, accurate source citations are the second of five components of the Genealogical Proof Standard.¹ Citations serve us in multiple ways, the most important of which is allowing readers to evaluate the credibility of our sources.² Documenting our sources is so critical to our field that the first eight standards in *Genealogy Standards* provide guidance in crafting these references.³

Despite their vital role—or maybe because of it—citations provoke frustration and angst, particularly among those who aspire to certification, but also often among experienced researchers.

Negative reactions tend to fall largely into three categories. One complaint is that citation guides are not helpful if they don't have the template we need. Another is that there are seemingly inexplicable differences in approaches among researchers in related fields. The third is a view that sources are somehow different in type and arrangement depending on the era and country in which they were created—and that we are left without guidance in crafting citations.

All these negative reactions, however, result from fundamental misunderstandings of the nature of citations and the reference works we look to for assistance.

Guides, Not Templates

Let's start with the frustration we sometimes feel with citation guides such as *Evidence Explained*.⁴ What we all want when we open its pages is to check the index for a source type and easily find a QuickCheck Model that we can then copy word for word, item for



item, substituting the particulars of our source. After all, we are told that: "... *Evidence Explained* covers citations for a full array of materials used by genealogists . . ." ⁵ When we don't find that model, or its parameters don't exactly match our source type, it's easy to get frustrated and throw up our hands in defeat.

Overcoming that frustration requires us to set aside any view we might have of citation guides as fill-in-the-blanks templates. Nothing could be further from the truth. Even in a work like *Evidence Explained*, with its hundreds

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of citation models, the most important content for us to review and absorb is the explanation of citation principles and source evaluation practices. The first two chapters, “Fundamentals of Evidence Analysis” and “Fundamentals of Citation,” are the true heart of the work. The models themselves are *examples*, with explanations tailored to the particular source types—not rote templates.

In an introductory section, the author, Elizabeth Shown Mills, notes that those first two chapters set out “the basic principles that apply to almost everything we do as historical researchers.” Only after thoroughly studying those general principles are we to turn to a chapter for the specific source type—and even there we are guided to “[r]ead the first few pages” for “guidelines and context that specifically relate to that record type.”⁶

So asking ourselves which *Evidence Explained*-style citation applies to our source is the wrong question. In almost every case, there is no absolute citation model with blanks we can just fill in. The variety of information in our citation and the order it appears often depend on multiple factors, requiring careful analysis, thought, and discretion. The factors that are critical to whatever approach we choose are set out in Standard 5, which asks us to describe the who, what, when, and where of each source, and—to direct the reader—a fifth element, wherein (“the specific location within the source where the information item can be found”).⁷

If we find ourselves lost in the models, it may be time to look to the added assistance of *Mastering Genealogical Proof*.⁸ Instead of a source-type arrangement, it walks us through citation components and the ways we might format them. This approach may be what we need to focus on the similarities between source types, rather than their differences, and

help us understand the reasons to choose one citation format over another.

The two works in combination describe the variety of choices we might make depending on source type, location, access method, audience, and final product. Together, they ensure that we make good choices based on understanding citation principles—not just picking from existing models.

Different Practices

A second source of frustration for many applicants is that the citation formats we learned for a different field or for publications in a different country don’t seem to be compatible with the BCG standards. Having painstakingly mastered a citation format in undergraduate or graduate school, we now are told to set aside what we’ve learned and follow a new set of rules. “Other styles and systems are not standard for genealogical writing,” Standard 6 states, and a footnote specifically tells us that those non-standard styles include parenthetical short-form references used in scientific writing or in *The Chicago Manual’s* author-date system, and “other disciplines’ styles and formats, like those of the American Psychological Association (APA), Associated Press (AP), and Modern Language Association (MLA).”⁹

This issue isn’t unique to genealogy, of course. Every discipline follows its own rules. Our discipline has a unique focus on source reliability and Standard 5 helps us present our source information in a format that works best for our purpose. But that doesn’t mean we can’t modify and adapt the formats we’ve used in the past—transposing them to the genealogical framework the way a piece of music can be transposed from one key to another.

Using Standard 5 as a framework, we can quickly identify similarities and differences and choose the right format for our situation. Consider the following citation found within a scientific journal article:

*Sinks and Zarfos 1998*¹⁰

We have part of the who (the surnames of the authors) and the when, but lack the remaining elements of citation under Standard 5. To complete the transposition and meet standards, we’d fill in the what (the name of the article), the where (in what journal was it published) and the wherein (the page or pages cited).

We do the same thing when we encounter a citation format, generally for publication, even within our own field. Consider this citation to a town deed book in Connecticut:

*Saybrook [Deep River] Deeds, 7:354.*¹¹

Here, we’re missing the when (date) and only have part of the who (town office) and where (specific location). The format meets the needs of that publication—often chosen for space considerations, but for purposes of demonstrating standards, we’d add more in the certification context.

The reason why we would not submit either of these in a portfolio is not because they don’t fit a model from *Evidence Explained*, but because they don’t meet Standard 5.

Around the World

A third frustration is a concern that the same citation formats can’t apply to sources from around the world because—so the reasoning goes—there are essential differences that originate not in preferences but in elemental differences between countries or societies.

Not so.

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Humans arrange themselves in the same ways around the world. Governments and organizations large and small use hierarchies to organize people for a common purpose. Places may be a jurisdiction (an area) or a building (a point). People participate in similar activities—paying taxes, traveling, controlling property, undergoing religious rites, and serving in the military. Standard 5 guides us in every case.

Take the following 1881 United Kingdom census example, which reflects one approach among European genealogists.

*The National Archives: PRO: RG11/1200/54 p. 24.*¹²

This citation provides the “where” and “wherein” for the census—the archival reference and page number. To meet Standard 5, we must add the who (creator), what (title), and when (date). We can find in both *Evidence Explained* and *Mastering Genealogical Documentation* a variety of suggestions for how we might arrange the resulting collection of details. There’s additional guidance we might locate from publications and educational institutions in the UK.

Every source has a creator (individual or institutional), a title (formal or generic), an arrangement (unless a single item), and content. It does not matter when or where or by whom it was created, or the way it is stored and accessed today. Whether a land patent from Virginia, a koseki from Hokkaido, or a metrical book from Kiev, we use the same principles to approach citations.

Taking It Home

As applicants and certifiers, it’s our responsibility to understand the sources we work with. The principles that guide citation format directly aid in that effort. Educating ourselves on source types around the world helps broaden our perspective and see better how to apply the universal principles of genealogy’s

best practices to the world’s records.

By doing these things, we can come to see that citations are a window into our souls as researchers. Their contents show how well we analyze and understand sources. Our understanding of different styles and practices speaks to our breadth of knowledge and experience.

As our comfort levels with citation formats grow, we become more and more detailed-oriented. That in turn builds confidence in our approach to citations and the justifications for our format choices. We can learn to view citations as a benefit rather than a burden. And we can overcome frustrations as we recognize how much we have in common.

Endnotes:

(All websites as of 1 January 2021)

1. “The Genealogical Proof Standard,” Chapter 1, in Board for Certification of Genealogists, *Genealogy Standards*, 2d ed. (Nashville, Tenn. : Ancestry.com, 2019), 1.
2. *Ibid.*, at 2.
3. *Ibid.* at 5–9, Standards 1–8.
4. Elizabeth Shown Mills, *Evidence Explained*, 3rd ed., rev. (Baltimore: Genealogical Publishing Co., Inc., 2017).
5. BCG, *Genealogy Standards*, 8, Standard 6, “Format.”
6. Mills, “Your QuickStart Guide to Evidence Explained,” *Evidence Explained*, unpaginated foresection.
7. BCG, *Genealogy Standards*, 7–8, Standard 5, “Citation elements.”
8. Thomas W. Jones, *Mastering Genealogical Documentation* (Arlington, Va.: National Genealogical Society, 2017).
9. BCG, *Genealogy Standards*, 8 and note 8, Standard 6, “Format.”
10. John Bian, Joseph Lipscomb and Michelle M. Mello, “Spillover Effects of State Mandated Benefit Laws: The Case of Outpatient Breast Cancer Surgery,” *Inquiry* 46, No. 4 (Winter 2009/2010), 433, 434.
11. Helen Schatvet Ullmann, “Benjamin Towner of Haddam, Connecticut, and His Three Wives,” *The American Genealogist* 86, no. 1 (January/April 2012): 12.
12. Helen Osborn, *Genealogy: Essential Research Methods* (Ramsbury, UK: Robert Hale, 2012), 198.