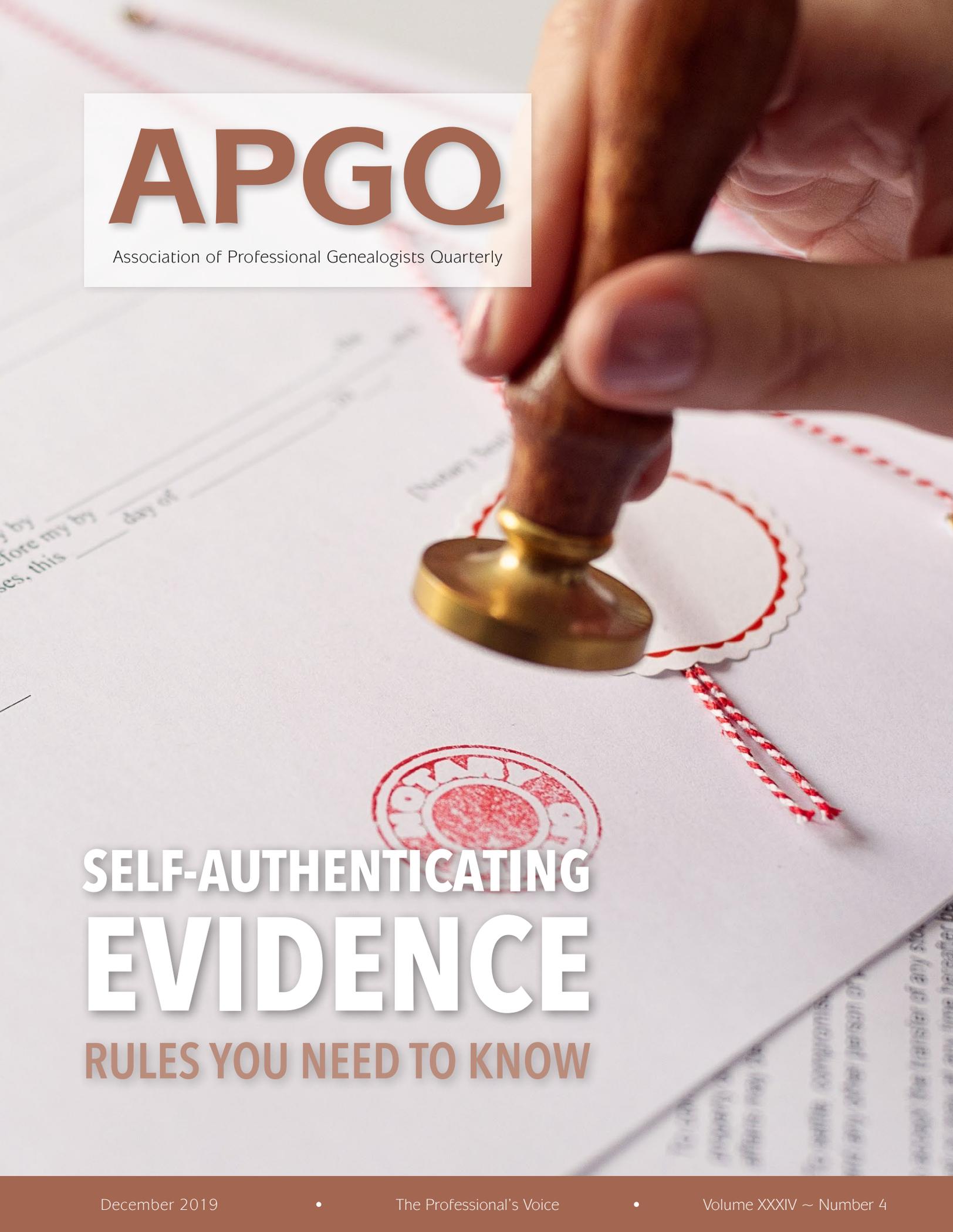


APGO

Association of Professional Genealogists Quarterly



SELF-AUTHENTICATING EVIDENCE

RULES YOU NEED TO KNOW



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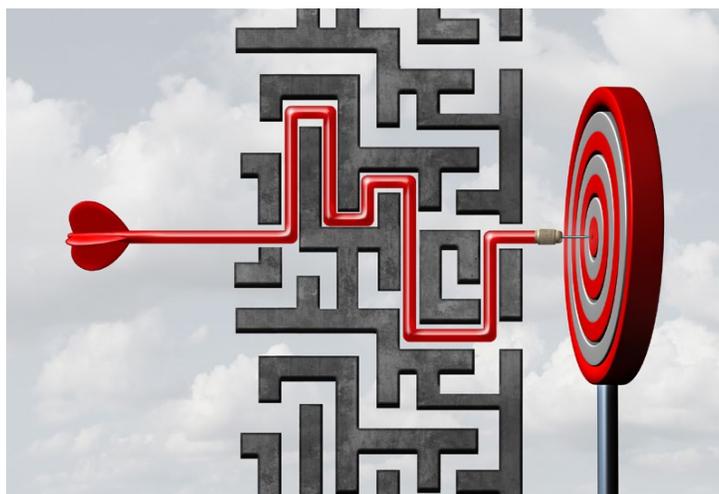
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How's My Writing?

Guidelines for Constructive Yet Tactful Peer Reviewing

by Jan M. Joyce, DBA, CG, CGL

How often do you actually give or receive writing feedback? Yet—how often *could* you give or receive it? As genealogists, we tend to operate alone on an island (I'm picturing a balmy island in the Pacific, but we all know that's not true!). I bet we don't help each other out with our writing as often as we could.

When Should We Ask for Peer Review?

Let's consider some of the opportunities in which we may want to consider peer review of our writing:

- You're planning to submit an article to a journal or other publication (hey, like this one!) such as *APGQ*, the *National Genealogical Society Quarterly*, *The American Genealogist*, the *New York Genealogical and Biographical Society Record*, and so on.
- You're preparing text for your slide presentation and the accompanying handout.
- You're completing an assignment for an institute or other in-person or online course.
- You're crafting your business brochure.
- You're writing a book.

Why Should We Engage in Peer Review?

Giving and receiving peer feedback can be stressful. As the reviewer, you know that the writer is relying on you to help improve the final product. You want to be constructive, yet you worry about offending the writer, right? As writers, sometimes we take feedback more harshly than it was meant. Plus, we are peers. It's possible that we have similar education and experience levels, so the feedback exchange may be uncomfortable. If the peer feedback process is stressful, then why should we do it? A few reasons come to mind.

First, the main purpose is to improve your writing by receiving, considering, and incorporating someone else's feedback. Who doesn't want to make their writing better?

Second, an exchange between peers is an important part of continuing education. Others have areas of expertise and experience that we may not. None of us knows *everything* about genealogy. If we're in a class or a group learning situation, we can often learn as much from other students as we can from teachers; it's an opportunity to reflect on others' perspectives.¹

Finally, if we're engaged in a study group, like those for ProGen or ICAPGen, peer reviewing and feedback is critical in this type of learning group. So it's essential to be on board for peer reviewing.

¹ Roganie Govender, "5 Reasons Why Peer Review Matters," *Elsevier*, 30 September 2015, [elsevier.com/reviewers-update/story/career-tips-and-advice/5-reasons-why-peer-review-matters](https://www.elsevier.com/reviewers-update/story/career-tips-and-advice/5-reasons-why-peer-review-matters).



More Resources for Writing and Peer Review

APG Writers Special Interest Group

APG members with an interest in writing and publishing can find support and education by joining the APG Writers SIG. There are monthly webinars on a variety of topics related to writing. Visit the APG website for more information, www.apgen.org/chapters/special_interest.html.

Professional Genealogy: Preparation, Practice & Standards

In *Professional Genealogy* (published in 2018), edited by Elizabeth Shown Mills, check out the chapter entitled “Critiques & Reviews,” written by Stefani Evans, CG.

What’s the Best Format for a Peer Review?

Format, you say? What other format is there besides providing feedback in writing (usually sent via email)? Well, there are a few types, and they each have their pros and cons. We probably think we should give and receive feedback on writing, well, in writing. That makes sense. But we have options that can make it even more productive. Consider the following:

- **Writing.** The typical method for feedback is writing. It’s easy to type our thoughts as they occur (for both parties). However, the tone of the writing might come across negatively when it wasn’t meant that way.
- **In person or via phone.** Instead of responding to the writer in writing, giving feedback in person or over the phone can be a richer experience for both parties. Explanations can clarify comments and might help avoid misunderstandings in meaning or tone. Platforms such as Skype and FaceTime may work for you also. The downside to this is that it may be uncomfortable to provide constructive feedback *live* especially if you don’t know the person well. This may also take more time, as you’ve likely made written comments and now spend additional time in person.
- **Live via chat.** If possible, do a live chat within the document (via a platform such as Google Drive). This is almost as good as hearing someone’s voice. You can interact at the

same time, giving feedback and asking questions that the writer answers immediately. I’ve found that this is a friendlier approach than traditional writing-only feedback. And, some chat technologies allow the interchange to be saved. A potential downside to live chat is that it is still in writing and tone can be misconstrued.

What Should You Ask Your Reviewer To Do?

I have a couple friends to whom I send nearly everything I write before I submit it (yes, including this article). They each have different strengths, from proofreading for grammar to wordsmithing to looking at the big picture. I know that between them, I’m pretty well-covered from looking like a complete fool before I submit something (they did not authorize me to say that, nor have they guaranteed in any way that I will not look like a fool all on my own, FYI). So, be considerate of the potential reviewer. If you’re writing an article on British military research, it may be a challenge for a reviewer who specializes in US adoption work.

As the writer, you can also request a certain type of review. For example, I’ve asked friends to focus on the proof arguments, but not spend time wordsmithing. You could ask someone to ensure you’ve met the Genealogical Proof Standard, review the structure, or find all your typos. Depending on the reviewer, you may have more success with the results of a specific request rather than a blanket request.

How Should Potential Reviewers Respond to Requests?

Think about your strengths as a reviewer. Do you focus on the overall structure of the writing and do you relish solving brick walls? Or, do you craft citations to perfection? When reviewing, be sure to clarify with the writer what type of feedback you will provide.²

Before you agree to review someone's work, ask a few questions. Are they in the draft or final stage? How long is the composition? When do they expect feedback? Knowing these answers will help you determine if it is the right project for you to take on.³

Guidelines

Now that we've covered some of the general considerations for peer reviewing, let's look at some guidelines. The following guidelines can help the reviewer, as well as the writer, make the most of the peer review process.

10 Reviewer Guidelines

1. **Skim First.** Sometimes it's best to begin by skimming through the paper quickly before making any editing comments. I know—it's difficult to do that and not start providing your feedback immediately. But doing this will help reveal the author's framework and give you a sense of where the paper is headed. Too often it's easy to write early feedback that is later determined to be unnecessary after reading through the entire piece.
2. **Be Mindful of Tone.** When you provide feedback, check your tone. I may say something like "I interpreted your statement to mean X; is that what you meant?" Or, "Have you considered positioning this analysis in another way, such as X?"

Additionally, when I think that what I've written could be taken in a critical tone, I may add a smiley face to soften it. 😊

Another way to soften your tone is to remove the *you* from it, which often sounds accusatory and negative. Instead of saying "You need to work on your research question," try something like "Perhaps the research questions could be more specific. One example that comes to mind is . . ."



Constructive Feedback with a Softened Tone

"Just because the two record sets didn't name another John Doe doesn't mean that there isn't one. Think about how many people weren't captured by a census because it was only every ten years, or they didn't own land, etc. Absolute statements in genealogy can rarely be made. You can still state something here just avoid using the word 'verified.' IMHO 😊"

—
"Consider switching the sequence of the heading or of the content in the column itself since you are showing it in reverse order. I know, that's super picky; I'm a geek! 😊"

3. **Ask Questions.** Instead of stating that the writer has made an error, or that something was written unclearly, consider positioning your comment as a question. Clarifying questions could include "Have you considered reworking this analysis to include proof of Christina's parentage?"
Or, "The citation formats seem to vary; what style are you intending to use?"



Feedback Using Questions

"Love this! Could you also review the price at which he sold land? Because if the sale was below market value, then it is even more convincing of a familial relationship."

—
"What do you think about moving this section above the birth proof section?"

—
"I am not personally familiar with slave holdings. Is it always true that if one owned slaves, then one owned land? Seems like a good assumption, but just wanted to check that this can be confidently stated."

4. **Check the Formatting.** Including feedback on formatting can help the writer improve the end product. For formatting, give advice that will help improve the organization of

2 Kate Coe, "How to Write: Editing Someone Else's Work," *Almond Press*, 4 September 2016, dystopianstories.com/hot-to-write-editing-someone-elses-work.

3 Ali Luke, "8 Tips for Editing Other Writers' Work (While Remaining Friends)," *Helping Writers Become Authors*, 15 June 2016, helpingwritersbecomeauthors.com/tips-for-editing-other-writers.

the paper such as moving sections around, or adding headings, subheadings, and tables or charts.



Format Suggestions

“Two date formats are used throughout the paper. Decide on one way to present dates and then be consistent. In genealogy writing, the day-month-year format is more commonly used.”

“I see an inconsistent paragraph indenting format from this page to the previous one. Can you check it?”

5. **Don't Overly Edit the Grammar.** Do not rewrite, or correct, everything you spot. If there are a lot of typos and grammatical issues, just suggest they all be corrected after pointing out an example or two. You shouldn't correct a lot of similar errors in one paper.



Grammatical Suggestions

“I've seen several run-on sentences in your article. I recommend reviewing the entire report to catch other instances of this. There's a website called Grammarly that may be beneficial.”

“The narrative includes quite a bit of passive voice. Consider making the people the subjects in most of your sentences.”

6. **Think of the Positives.** Provide positive feedback multiple times. You can comment on the formatting, wording, research, analysis, and more. Try to start your review with a compliment of some sort. By doing so, the writer will likely have an upbeat attitude and then be able to accept the constructive feedback more easily.



Positive Feedback

“This is a very interesting section! It really helps the reader understand the family better.”

“These maps are fabulous resources. I really like that they were included in your report for a quick-glance reference.”

“I love tables. It's great to include these tables and they make it easy to scan the data.”

7. **Apply Board for Certification of Genealogists (BCG) Rubrics and Standards.** It's very helpful to back up your constructive comments with the certification rubrics (available at bcgcertification.org) and standards outlined in the book *Genealogy Standards*, when applicable. That way, you're pointing out a specific requirement that was not met in the paper. Include a direct reference to a standard when possible.⁴



Using BCG Rubrics and Standards

“Look at the BCG rubrics for case studies, particularly CS3 quality of evidence, and consider if you've met that requirement here.”

“This report clearly identifies the records that provided evidence to support your conclusions. What about any nonproductive searches? Be sure to include and cite them as well. See standard #74 bullet 8.”

8. **Try to Educate.** Refer to other experts when it can help the writer learn and improve the paper. You can do this by providing references to recognized sources such as *Evidence Explained*, *Mastering Genealogical Proof*, *Chicago Manual of Style*, and more.

⁴ Keep in mind that when preparing a portfolio for the Board for Certification of Genealogists, no peer review is allowed. You're on your own with that work.



Referring to Other Experts

“You probably already know this, but on pages 19–20 of *Evidence Explained* (third edition) by Elizabeth Shown Mills there are “levels of confidence” descriptors. I sometimes go there (I have it bookmarked with a bright pink neon sticky note) to check if the word I’m using matches what I intend.”

“Have you read *Mastering Genealogical Proof* by Tom Jones? It has a concise description of conflicting evidence and how to resolve it in chapter 6.”

9. **Summarize the Whole Piece.** Be sure you’re looking at the big picture in the written work and provide feedback accordingly. If you’re providing written feedback, placing a summary at the end of your comments may work best. Or, perhaps, after giving constructive feedback throughout the piece, go back to the beginning and note your summary there. You decide!



Summary Comments

“Nice job on this death proof. It’s very well-organized, and you bring the sources together nicely. Your writing is easy to read, clear, and concise. I have made a few suggestions to help you tighten it up.”

“Your conclusions are solid throughout the report; I agreed with them all. The progression of the evidence worked really well. The research objective was not clearly stated up front. Consider working that in.”

10. **Be Constructive.** Finally, providing constructive feedback is the most important guideline. Spend the most time and effort crafting comments that address weaknesses and help improve the overall piece of writing. Look at it this way, you want to help the writer achieve his or her goal for the paper. If writing a proof argument to verify a generational link, be sure the conclusion is supported by the evidence and everything is solidly analyzed and clearly articulated. Integrate many of the other guidelines as you give constructive

feedback, such as applying a friendly tone and asking questions.

11. **Bonus: Add Some Humor.** OK, so there really are eleven guidelines, but not everyone is comfortable with humor, so I made it a bonus one. (Plus, who makes a list like this of *eleven* things? That’s silly.) If you can integrate some tactful humor and it suits your personality, include it. Make your comments fun and not too stuffy.



Adding Some Humor

“Ahhhh, you poor thing, you have Smiths in your ancestry. Mine are almost as bad—Johnsons!”

“When I used to work in direct marketing (yes, that kind of marketing that everyone hates—mail and email), I learned a couple of proofreading tricks. Read it backwards to check for spelling. Read it aloud to check for missed words, grammar, and readability.”

5 Writer Guidelines

What? The writer has a role too? You bet! You can help set the tone of the peer-reviewing exchange by how you receive and, more importantly, how you respond to, feedback. Many of the same principles from the “Reviewer” section apply, so be sure to understand and think through those as you’re reading comments from your reviewer. Here are a few writer guidelines to follow:

1. **Ask for Honesty.** The word *honesty* might sound a little rough. But, when you ask for a review, you really do want the best feedback your peer can give you. So, say something like “I really appreciate you taking the time to review my paper; please give me your honest opinions and know that your constructive feedback is welcomed!” And remember, you can ask for a specific type of review by saying something like “Help! Citations aren’t my strength.”
2. **Be Open.** Sometimes our initial reaction may be “She said what? I worked so hard on that proof argument; I know it’s perfect!” Take time to read the comments thoroughly and then really think about the reviewer’s viewpoint. You may even need to consider it for a day or two. Don’t take offense if the tone seemed abrupt. It almost certainly was not meant that way.

3. **Ask Questions and Discuss.** Ask clarifying questions if the reviewer's comments were not clear or comprehensive. This exchange is really what the power of peer reviewing is all about. You learn. The reviewer may learn something too.
4. **Respond and Offer Thanks.** Your reviewer likely spent a good amount of time reading your work. Be sure to offer thanks. If your reviewer has failed to follow the *be nice* advice herein, then take a minute to read a short essay entitled "The Peer-Review Jerk Survival Guide" which outlines just what to do when that review is not what you expected. I promise, you'll feel better afterwards!⁵
5. **Remember Tone.** See above. 😊

Are You on Board for Peer Reviewing?

There are many ways to optimize peer feedback. These guidelines should help get you started, plus you likely have great ideas of your

own! And, like with most things in life, practice brings improvement. You probably already utilize many of these guidelines. For the few that you think you could use, write them on a post-it note, stick it on your monitor, and try to employ them the next time you review someone else's work or someone reviews your writing.



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⁵ Rebecca Schuman, "The Peer-Review Jerk Survival Guide," *ChronicleVitae*, 28 July 2014.

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