



GEN-FIND RESEARCH ASSOCIATES, INC.

HIRING A PROFESSIONAL GENEALOGIST

Most of us want to undertake our family history or genealogical research on our own, not only because it is personal but also because it is the least expensive way to go. "Personal" often implies better research because only you, the family member, often know only the subtle nuances and family lore of your ancestry. "Least expensive", too, is something that always must be considered in a hobby that is very time-consuming and as a result can also become very expensive in the long-run, even if one does undertake the research themselves.

Generally, it is common fact, however that for the most part everyone will need to hire a professional genealogical researcher to undertake some or all of the research you desire during the life of their project. More often than not, however, we do not carry the skills nor have access to all of the resources to make a proper search of localities for the entirety of our project. One will need to seek the assistance of a professional who has access to those records and knows how to interpret them. You, as the family historian, have the responsibility of researching all of the available resources to the best possible conclusion and this should also encompass using resources and services that are out of your realm of expertise and knowledge. Still others may not have the time or the interest in undertaking their research on their own and thus, too, may find a need to hire a professional in this field.

Hiring a professional genealogist - someone who works on a fee as compensation for their services - is often a prudent and excellent way to know more about your family roots or in solving intestate estate cases. Finding and hiring a competent genealogist is sometimes a difficult process primarily for two reasons. Firstly, unless you are familiar with the certification boards who list their members or know of genealogists in a particular region that you are wanting work to be done in it is often difficult to obtain contact information on these professionals. Secondly, not all genealogists are created equal, as with any profession - some offer better skills, education and experience than others - so, beware of hiring those that do not meet your expectations.

Finding a competent genealogist for your area of interest is the same process as for seeking out any other qualified professional. One needs to identify three elements: (1) what you as a family historian are wanting to accomplish with the intended search and what information is already known on the family member that will assist the researcher; (2) you need to gather some general information on what services professional genealogists perform, their detail skill levels, areas of specialization, experience & education levels, and finally their fee structure which will often vary like those in any professional field; and (3) lastly, one needs to know the what questions to be asking in order to better evaluate each possible candidate as your list of professionals will vary significantly and the cheapest or the closest to the locality of interest is not always the best of choices.

Generally, we will see professionals in this field fall into seven prime categories of specialization, though some professionals may offer more than one category of service:

- Genealogical Record Searchers
- Reconstructive Pedigree Genealogists
- Genealogical Lineage Specialists
- Forensic Genealogists
- Historians
- Geneticists
- Genetic Kin Reconstruction Specialists
- Librarians and Archivists
- Consultative & Language/Handwriting Specialists
- Chartists & Graphic Specialists
- Writers, Artists, Indexers, Columnists and Editorial Specialists
- Genealogical Booksellers and Publishers
- Genealogical Lecturers and Instructors

I. GENERAL INFORMATION

Genealogical Services Provided

The services offered by professional genealogists fall into primarily five types:

Record Search Services

Genealogical record searchers examine only the source records which you, the client, instruct them to search. They do not develop pedigrees, and are often not qualified to do so effectively. The services of this professional, however, are often excellent when confined to examining records and reporting the results of the search as they often are extremely familiar with the available records within their search zone of specialization along with the interpretation and nuances of those records. Further, by hiring a genealogical record searcher versus a genealogist, one can save a great deal of time, travel costs, and costs of analysis on a search problem in which the client is capable of undertaking on their own.

Ancestor Reconstructions

Most often clients want to trace their family lineages back in time, which might encompass two collections of ancestry: (1) - a full blood-line search; and/or (2) - a full/partial search for all collateral lineages connected to the direct blood lines. In either case, one may want to extend the search back only to a certain time period or specific ancestor, which is often the case when one wants to join a lineage society and must prove that one of their ancestors participated in a historical event such as the Revolutionary War or the Loyalist cause, while others may hold no restrictions on the search in this manner and simply want to discover as much as possible about their immigrant ancestors & families, where they came from and why. A *professional genealogist* is required for this work as they are capable of reconstructing extensive pedigrees and knowing how to do so.

Descendant Reconstructions

In addition to, or standalone, many clients wish to search for the blood descendants of a particular person or persons and a professional genealogist can help you with this project as well. Often we see persons interested in starting a family organization of descendants of some person or one-name studies developing along this line. This service also often provides the client with details on contemporary surviving descendants of an ancestor along with contact information. Further, this is the service that most public trustees, attorneys and others use in reconstructing lines of descendancy and heirship that comes with testate & intestate estate probate cases.

Missing Persons Location

Many clients wish to contract professional genealogists to locate missing relatives, lost friends, missing natural birth parents, and lost adopted-out children. As well many attorneys and public trustees hire genealogists to search available source records to locate known beneficiaries to estates. With this type of service a client needs to locate a professional genealogist who is familiar with 20th/21st century records, and how to locate persons using these available alternative sources when most of the resources that genealogists traditionally use are closed due to contemporary privacy concerns.

Other Genealogical Services

Professional service providers in this field also provide a range of other important services for clients that include the following, none of which are further elaborated in this writeup though comprise a significant number of individuals anymore in this field. Some of these services may be provided by competent genealogists as well while others may only hold credentials or experience associated directly to their field of operation:

- Consultations on genealogical problem resolutions.
- Computerizing and charting of genealogical information.
- Editing and writing of genealogical manuscripts.
- Abstracting and publishing of genealogical primary and secondary source information.

Deciphering and interpretation of old hand-writing
Translation of foreign records
Instruction and lectures on genealogical topics and issues

Genealogical Research Methodology

Aside from those specialists noted in Other Genealogical Services, who will have a slightly different form of methodology to their work, most persons **researching** their family history, including the professional genealogists, perform much the same process for undertaking research and reporting. To have a better idea as to what to expect from the professional genealogist that you hire, you will need to understand what services you should expect and what you will be charged for as a client. The genealogist will generally go through eleven general steps in providing you with their service:

Analysis and Interpretation of Information - Importance of any search first begins in the effective analysis and interpretation of client-submitted information. If the client is not clear the search may become directed in an area that is not wanted; if the client is too verbose, the costs for him/her will be more sizeable in wasting the researcher's time; if the details are too few, more work will be required by the researcher or worse, duplication of work already performed by the client may be undertaken. Good genealogists review material with you so they clearly understand what is expected of them but good clients also realize that making the search details clear, concise, and cogent make the job easier for the researcher and less expensive for themselves. Be sure to give your genealogist ample start-up time on your project in allowing him to understand what you know and what you don't know about your search subjects. Genealogists need at least eight to ten hours to start being productive on most research projects. Simple tasks, such as performing a records search or evaluating a lineage, will take much less time. So, clearly, for major genealogical searches, you need to plan on at least ten to twenty hours of fees & expenses to reasonably hire a genealogist to undertake work for you. Too many clients underestimate the amount of work that is required to hire someone to do this type of detail work, so be reasonable with your expectations.

Objective Definition - It is important to understand and write what it is the client is wishing to accomplish with the assignment. Doing so clearly will establish the success or failure of your assignment to the researcher.

Research Problem Definition - Further, it is important to understand what problem(s) now exist with the search from the client's viewpoint and from the researcher's viewpoint. What the client views as the problem may be more complex as viewed by the researcher, resulting in a more in-depth research plan.

Research Plan Development - The genealogist will next need to develop an outline of prioritized strategies that he/she will implement in order to meet your objectives with the known problems in mind. Good performance by a genealogist will provide for written a research plan, if for no other reason than for themselves, however your genealogist may share this with you and you are certainly able to ask them for this outline. It must be remembered however, that this outline is tentative and always subject to change depending upon the results of each implemented strategy.

Research Plan Implementation - As the research plan gets implemented, your genealogist will conduct source record investigations to search for the information wanted in such repositories as libraries, courthouses, archives, cemeteries, funeral homes, government offices, to name but a few. As they search these records, photocopies or certified copies of pertinent records will be undertaken and subsequently source referenced. It is important to also realize that research may be in various forms: personal visitation to repositories, by letter, through examination of digitized sources, by telephone or fax or e-mail and through inspection of secondary indexed or abstracted sources.

Analysis and Evaluation of Findings - It is important that genealogists regularly review and evaluate their findings in light of other information found. Based upon these evaluations certain conclusions can be established about what was found and what it meant. They will also be comparing their findings with information from other documents, to confirm or disprove assumptions/conclusions made to date. All along the way examining as many documents as possible, depending upon client's wishes, in leading to some form of proof or conclusions to events.

Report Preparation - As the project develops, the professional genealogist will prepare a report to his/her client about their research activities and the results and these should be fully source referenced. The report will include photocopies, abstracts, transcriptions of information found and will also include suggestions for ongoing research, if this is directed by the client's objectives.

Forms, Charts, Graphics Preparation - At the client's request, the genealogist will provide you with pedigree charts, family group charts, and other graphic representations that will assist you, the client, to better understand the family relationships that have been found and documented. Many will now also provide you with computerized versions of these graphic representations. Further, some like the Lineage Specialists, will be able to provide you with applications to lineage societies, or other applications to government agencies that you may require to undertake further research on your own.

Photocopy & Sourcing of Relevant Documents - A good professional genealogist will always provide the client with photocopies, abstracts, and transcriptions of source records found relevant to the assignment and these will be properly source referenced.

Sharing of Research Results - Some genealogists will also help you to share your information with others through such avenues as the many GenWebs that are available on the Internet or through such other genealogical data banks as the Church of Latter-day Saints (LDS) Ancestral File™ by uploading your data to those systems. Still others, may prepare articles, write manuscripts, or submit names of ancestors to LDS temples.

Billing Preparation - Lastly, and certainly as important to both parties, the professional genealogist will take time to prepare billings for their services, usually at agreed-upon intervals. These invoices, at minimum, should clearly specify, the time authorized and spent, the fees charged, the expenses incurred on the project since the last billing and on the project to-date. These invoices will generally be included with each report and will be payable on receipt. It is important to realize that sometimes the researcher has expended their own monies many months in advance of the report and thus, though most offer terms of payment of 30 days, prompt payment by the client is of the utmost courtesy. Keep, in mind, most of us would not want to wait months for our own wages after we had already performed the service for our employer. If you disagree with charges, relay those concerns to your researcher as quickly as possible so that some sort of resolution can be promptly obtained.

Genealogical Credentials

Legally, genealogists are not required to be registered, licensed or certified/accredited, however some do seek certification or accreditation through some of the organizations that they feel are relevant to their work. In particular, in North America, we see The Board for Certification of Genealogists (BCG) out of Washington, DC, and the International Commission for the Accreditation of Professional Genealogists (ICAPGEN) out of Orem, Utah, the latter being primarily based on an LDS focus and history. Both organization grant credentials and offer an arbitration process should the client or the researcher be unhappy with one another or problems arise.

So, credentials are important and often indicate, if nothing else, that someone is committed enough to work towards this level of expertise for the benefit of others, however academic postnominals do not necessarily a good genealogist make! Levels and variety of of experience are more important to comparing genealogists, and certainly not every genealogist is created equal - as with any profession!

However, most professional genealogists are self-taught and many do not seek any form of education or credential levels and with many years of experience produce very good

results for their clients, though one should always question why they have not sought more professional acceptance from imminent peers when doing work for hire. Though they often provide quality work, like any profession, a higher degree of excellence should be obtained through certification or accreditation when undertaking work for paying clients. Of course, with this said however, be prepared to pay a slightly higher fee for those researchers who do have these credentials and extensive work experiences.

Compensatory Rates for Genealogists'

Probably no more than any other profession will you find rates that vary so widely as in this community. Clearly, there are those who feel that they are not worth the importance of the work they are conducting and charge close to minimum wage while others feel great self-importance and charge exorbitant fees for their services, but again this is no different in many of the professions. As we all know, service providers who charge higher rates do not necessarily do better research. Further, those who charge lower rates may also be a sign of less education and experience in the field. Whatever the rates, it is important for the client to realize that the professional genealogist or record searcher is operating a business and that business has costs much above what one would charge as an employee in a firm for wages. They have the normal operating costs of any business, the insurance, the rent, the constant cost of acquiring reference material and upgrade of electronic and other capital equipment, plus operating capital and the ongoing and extensive costs of training needed to provide continued better service.

Further, rates are affected by the nature of the work. Those involving one field of service may have more or less than someone else in another field of service in terms of expenses and thus the fees again will vary.

Lastly, no researcher, in this profession or any other, will be able to guarantee that information on your ancestor or descendant will be found. Much of the success of any search will be dependent upon how much paper-trail your ancestor or search descendant left in the records. If he or she was prolific at leaving trails of events in their lives, your genealogist will probably have great successes for you otherwise, even the best genealogist in the world will not be able to provide evidence of your ancestral connections.

Fee Structures

As mentioned, rates will vary however most genealogists charge an hourly rate, often called "time & expense", though some will also charge by flat fees, contingency fees, or percentage-of-completion fees:

Time & Expense: Charge-outs for this type are hourly fees plus expenditures incurred in the performance of the case. Disbursements will be varied, however, normally cover such things as registrar/archival fees, microfilm/microfiche rental, photocopies/printouts, telephone/fax charges, letter writing charges, out-of-area-travel time required, sub-contractor fees, vital records searches, etc. Out-of area travel time is normally charged in full at cost. All other out-of-pocket disbursements are charged at cost plus a markup. These billings may be either hourly or daily.

Flat Fees: Billing according to this category is much more dependent on the type of case. It is generally more possible to set a fixed fee on assignments which have clear problem definitions and defined research parameters as in the case of particular record searches. The all encompassing fee would include any disbursements incurred in the conduct of the case, a base amount which would be calculated into the flat fee quoted..

Contingency Fees: Contingency fees are contingent on the outcome of the assignment. If the assignment concludes positively, as with the case of locating the relevant heirs/beneficiaries, for example, then the fee and disbursements are payable by the estate (by agreement with the heirs) or the client. Should the assignment not conclude to completion of distribution of the estate, then no fee nor disbursements would be payable to the researcher and they would assume the responsibility of all fees and expenses.

Percentage-of-Completion Fees: Billing arrangements in this category reflect those cases where it is anticipated that the work may be significant and both client and genealogist agree that control needs to be maintained on the work and the resulting cost outlays. Should you feel that billings need to be more frequent than at the end of the assignment, this option may be more appropriate for you. Again, disbursements would be varied though normally cover such things as registrar/archival fees, microfilm/microfiche rental, photocopies/printouts, telephone/fax charges, letter writing charges, out-of-area travel time required, sub-contractor fees, vital records searches, etc.

Most genealogist base their hourly rate on such things as their skill levels, experience, education, training levels, and credentials and of course what the market will bear in an area. Rates, as mentioned, will vary significantly. For professional genealogists, currently in 2022/23, be prepared to pay anywhere from \$10.00 per hour to \$190.00 per hour, possibly even more in regions where there is a lot of interest and few genealogists available or where a particular research is in high demand. Rates in Europe, for example, can even get more expensive than that. Genealogical Record Searchers will charge, normally, a bit less for their area of operation. Some service providers also offer a wider variety of services and expertise which will also justifiably increase their rates to prospective clients. Many genealogists will request a "retainer" or "draw-downs" before work begins, with additional payments along the way with each report. Remember, a good experienced genealogist is like having a good savvy lawyer - they can save you many months and years of frustration in solving your case quickly and be a blessing to obtaining those great results that you expect!

Expenses

As mentioned, in addition to the hourly rate, most genealogists, regardless of the type of fee structure, will expect compensation of their expenses incurred on the assignment as well. This may be charged separately or part of their overall inclusive fee. Common expenses will include such things as:

- Fees paid to government, archival agencies, courthouses, etc.
- Fees paid to sub-contractors to search for records in distant localities.

- Costs of documents and certificates.
- Field travel costs such as automobile, airfare, meals, lodging, etc.
- Administrative costs for things such as telephone/fax, postage, supplies, secretarial services, charting services, microfilm/fiche rental, photocopies/printouts, letter-writing charges, etc.

You can do some of the following to help control your costs as a client:

- Personally, gather as much information on your family as you can before hiring the professional and rely on the information to them when beginning the process in a clear, concise and cogent manner.
- Split your project into smaller manageable components.
- Request frequent reports and billings (say every three months) to help control the costs that are being incurred to your intended budget.
- Come to terms, in advance with your hired professional, what overages can be billed for and under what conditions.
- Possibly other family members will be willing to share in the costs of the project.

II. SEARCHING FOR AND HIRING YOUR GENEALOGIST

As previously implied in this discussion, here are some detail steps in searching for and hiring your genealogist or record searcher:

1. **Determine what you know about your search subject(s) and your research needs/objectives are.** Do not start with general or vague goals, so clarify the problem and objectives before you hire someone using whatever resources you can find such as vital records, obituaries, funeral programs, diaries, journals, old letters, photocopies of documents, old Bibles, military records, naturalization documents, photographs, personal objects, family histories and stories of family tradition or folklore to name but a few resources. In doing so, you will find that both you and your researcher will more clearly understand what is involved with your assignment and the cost. Possibly you will find that you do not even need to hire someone and you can obtain the information yourself directly from friends, from a genealogical society, or from a particular repository.

2. **Obtain a list of genealogists and genealogical record searchers, or other genealogical professionals,** from some useful sources such as the membership roster of BCG or ICAPGEN, both of which have an Internet website presence. Ascertain, based upon your objectives and known information, what expertise the prospective researcher has to have for your assignment. Then contact the organizations previously noted or libraries, archives, courthouses, or genealogical societies local to the area of interest for a list of their professional researchers. Though they make no attempt to assess credentials of these people most do maintain a list of those who work there for others for a fee. As well, the Association of Professional Genealogists (APG) out of Salt Lake City, Utah also hold a membership roster of qualified searchers.

3. Contact those candidates you feel may be helpful to your search needs and select one. Contact those genealogists whose skills and credentials seem suitable to you. For the most part, most genealogists are extremely busy and would prefer you to send in written correspondence to them because they then have the facts in front of them and can think about and better respond on the project. Be sure to include your return address, and other contact details, along with a self-addressed stamped envelope (SASE) with your correspondence. You should clearly and concisely identify the research problem(s) and objective(s), sources investigated & results, and provide copies of any relevant documents. Further, ask about his/her availability to undertaking your assignment, access to records, the reporting procedure (if it is important to you), and his/her area of specialization & credentials, rates and billing methods. In addition, you can gain an idea of the genealogists skills and competence if you request a sample report of their work and a proposed research outline for your own project. Remember to be reasonable with your requests and expectations, however.

4. Determine which of the available genealogists meets your expectations and make a verbal or written agreement before your assignment begins with them. Decide which candidates best meet your needs for the assignment and consider these aspects of the chosen candidate: understanding of research problems and objectives; fees and billing arrangements; education background and associated skill levels; accessibility to the available records to solve your problem. Remember, the proximity to the records of interest is not always a good reason to hire someone. Many qualified researchers exist distant from the actual set of records and as long as they have a network of subcontractors to access those intended records, the client should not hesitate using them. Once chosen make a verbal agreement, if the project is small, or a written agreement if the assignment is much larger. The agreement can be as simple as stating your expectations and authorizing the genealogist to proceed based on a particular monetary budget. More and more genealogists are using formal written contracts so do not be afraid of these. Any agreement, verbal or written, should include at least the following, however:

- A summary of the background information on the assignment.
- The research objective(s), problem(s), and scope of the project.
- The fee and expense compensation arrangement.
- Payment and limitations of fees.
- How cost overages from budget are to be handled in the billing.
- Publication rights to the research findings.
- What the contents of the reports will be and their approximate frequency.

Remember, some of these items may be set by the policies of the genealogist but both the client and researcher should still be made aware of what they are.

5. Provide the relevant information and retainer, if necessary, to initiate the assignment and keep abreast of the project through regular intervals. After

selecting your candidates supply him, along with the relevant retainer, with the detail information compiled in "information gathering process" on your search subjects so that he/she can be completely aware of what records have been found and the research that has already been done. Remember to send good photocopies of any relevant documents and never send originals for the researcher most often will want to retain these for their own files. To avoid communication problems, remain in regular contact with your researcher during the duration of the project and keep abreast of the progress of the assignment - both in terms of what is being done and where the researcher is going next. Remember, too, to be considerate of their time as well, however. They have lots of clients, you are not the only one, and further it takes time to develop a quality search & report. However, if major problems do arise during your working relationship together, get in touch with the organization that certified the genealogist. Many of these organizations will happily mediate or arbitrate disagreements between the genealogists they certify and their clients.

Most of all, enjoy your project and your working relationship with your genealogical researcher. Doing both, along with good communication, will make for great results on your project!