

Tips for Hiring* a Professional Genealogist

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Ark-La-Tex Genealogical Association
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* Evidenced by a written Agreement or
Contract between You the Client and Your
Researcher, no matter whether paid, pro bono,
or some other consideration is given.

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Agenda

- Where to Locate Professional Genealogists & the Ethical Codes They Follow?
- What is the breadth of your research goal: is it specific or broad? Is this goal open-ended or closed?
- What degree of correlation, analysis, and conflict resolution is expected from your researcher?
- Managing Expectations: Your Pro and You the Client
- Final suggestions and important takeaways.

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Where to Locate Professionals & the Ethical Codes They Follow?

- **Credentialed** Genealogist Rosters & Codes of Ethics
 - BCG: Certified Genealogist™ [CG™] <https://bcgcertification.org/directory>
 - ICAPGen: Accredited Genealogist™ [AG™] <https://www.icapgen.org/professionals/>
- Association of Professional Genealogists (aka APG)
 - https://members.apgen.org/members/directory/search_APG.php?org_id=APG
- Researcher lists [researcher capability varies ... host orgs may **not** vet background/credentials]
 - Archival Repositories (International, National (e.g., NARA), State, Regional, Local)
 - Research Libraries (National-Lib. of Congress, Regional, State, Local, Universities, etc.)
 - Historical, Archeological, and Genealogical Associations, Museums, etc., at all levels

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Your Research Objective ...
Key Starting Point!

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Research Objective (RO)

- **Closed-ended**, perhaps **narrow** RO should be worded in such a manner that both the client & researcher know when the RO is completed: “**Identify the Maternal Grandmother—or candidates for the same—of _____, to the extent permitted by the professional genealogical services the client authorizes.**”
- **Open-ended**, often **broad** RO example: “**‘Such & Such’ _____ Research Project: Determine the Paternal Lineage of the Client’s Grandfather _____ in accordance with BCG Standards and consistent with a Narrative Paternal Lineage, Ascending, NGS Style.**” This type of effort is almost always limited by client’s budget and/or other constraints. It is not unusual to see this project extended in phases, with each new phase governed by its own agreement.
- No credentialed or professional genealogist abiding by published, respective codes of ethics can “guarantee” success. This should be included in any Agreement.

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Is the Research Project Basic or Advanced?

- **BASIC RESEARCH:** Is the client hiring a professional as a **hunter-gatherer** of records/images meeting the client’s criteria? Such an effort typically yields at least a Calendar of Findings, properly cited. The client may also require a recommended list of candidate sources that the professional was not able to locate or access in the time allotted.
- **ADVANCED RESEARCH:** Is the client hiring a professional for his or her **expertise** in **acquiring, analyzing, correlating, and assessing the suitability and reliability of information as direct or indirect evidence relevant to the project**? Is the client hiring that person to also **resolve in a coherent, written manner any conflicting evidence** that might arise? The project’s expected written products should be defined in a written Agreement, and **the professional’s work and work products should be consistent with identified codes, standards, and guidelines expected of the professional.** ***next slide***

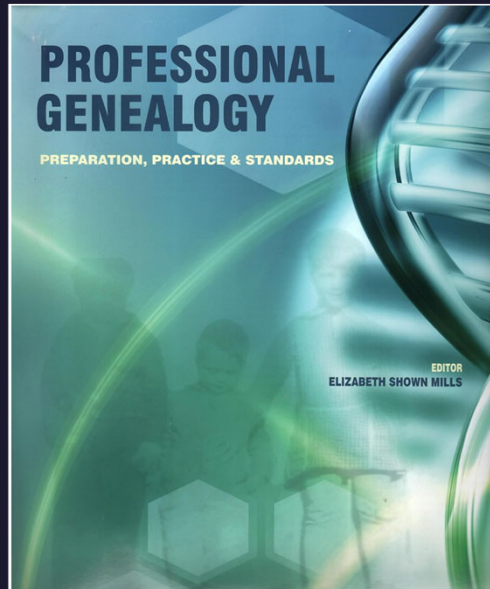
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Ask Your Home Library to Acquire:

[**from last slide] ... *the professional's work and work products should be consistent with identified codes, standards, and guidelines expected of the professional ...*

Fondly referred to as **ProGen'** >>>>>>>

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Managing Expectations

Your Professional Genealogist

You the Client

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Expectations of Your Professional Genealogist: a few brief examples

EXPERIENCED PROS **SHOULD**

- Seek to Find the Person(s) of Interest
- Reconstruct the Person’s Life Events using E. S. Mills’ “Evidence Analysis Process Map”^{*}
- Use Published Standards (especially the very important Genealogical Proof Standard)
- Evaluate Findings through the Lenses of *their* Time & Place

EXPERIENCED PROS **SHOULD NOT**

- Find *Names* [pitfall: *The Name’s the Same*]
- Blindly attach an Historical *Trend* to an Ancestor or an Ancestor’s Kinship Group
- Declare an Ancestor as Proven in the Face of Insufficient Relevant Evidence or Unresolved Conflicting Evidence
- Evaluate Findings using 21st Century Lenses

* Elisabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace, 4th Edition* (Baltimore: Genealogical Publishing Co., 2024), front flyleaves and pages 17-44.

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Some Expectations of You as the Client

Take Advantage of Waiting List time to compile & send to your professional ...

- Professional reports or your summaries of previous research touching on the problem;
- *Life events of researched candidates* (kinship groups): particularly those containing religious affiliations; occupations; location & residences; dates and places of births, baptisms, marriages, & deaths; land ownership/leases; military records; etc.;
- Notes on sources or collections already searched, even if negative results occurred;
- Compiled family group sheets, ancestor/descendant charts, event timelines, etc.; and
- Information that you may have obtained by way of the Internet, including where possible the exact URL address of the pertinent web pages.

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Final tips & takeaways (1 of 3)

Your Professional is not Superman or Superwoman:

[the following items appear in many of the presenter’s Letters of Agreement]

“The genealogist cannot predict with certainty how successful the findings and conclusions will be with respect to the project’s research objective:

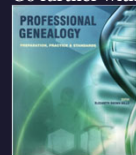
- The client’s ancestors, spouses, extended families, friends, neighbors, associates, and their governing authorities controlled what **records they created**.
- Those who held, handled, or currently hold the records affected **the extent and degree to which they survived**, and to some extent **the records they will allow the genealogist to examine**.
- What the genealogist controls, however, are the **types of records s/he elects to seek** for the time and place of interest, **how s/he analyzes and correlates the information** they contain with other records, and **the way s/he determines its suitability and reliability as evidence**.”

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Final tips & takeaways (2 of 3)

- Together, Your Pro & You Must Protect the Privacy of Living Persons
 - If living persons are desired for DNA testing, follow the standards protecting their personal and genetic identities.
 - If living persons are uncovered during paper-trail research, preferably ensure that a separate, client-eyes-only research report is warranted for those findings.
- Consider
 - Identifying **Beneficiaries** for the products you expect from your Pro.
 - Copyright implications. For example, **the way in which your Pro elects to express** information found in **public domain** records within her/his Report is **copyrightable**. Likewise, for the Pro’s hypotheses, theories, conclusions, and recommendations.
 - Your Pro may desire your “Permission to Use Research Results” for various purposes. *[The presenter will send you the form he asks clients to consider upon request.]*

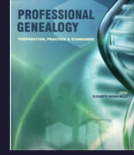
Go further with:



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Final tips & takeaways (3 of 3)

Go further with:



- Research Services & Reimbursables
 - What are considered “**Reimbursables?**” These are distinct from **Research Services**.
 - Your Agreement should include *well-defined* **Hourly & 3rd Party Research Services** and **Reimbursables**.
 - Use a Budget Ceiling on research services to control open-ended, broad projects.
 - What restrictions are imposed on 3rd party research services, if any? For example, for certain projects, the client may want only the eyes & mind of the Pro involved.
- The Pro will almost always perform the work as an **independent contractor**, and **not** as the Client’s **employee!**
- The Agreement should include how disputes are arbitrated.

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Thank you



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