

Making the Leap - Becoming a Professional Genealogist

Getting Ready to Leap

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Session: PH7232



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“The expert in anything was once a beginner.”

“The top experts in the world are ardent students. The day you stop learning, you’re definitely not an expert.” ~Brendon Burchard

When you are ready to make the leap from ardent hobbyist to a professional genealogist, you will have a good understanding of the following:

1. What are your genealogical skills? Experience in searching archives and libraries?
2. Do you have a genealogical specialty? (military records, court records, language skills, etc.).
3. Are you a member of a genealogical society? (Do you participate, serve or teach there?)
4. Do you have experience in analyzing a client’s research problems and previous work done?
5. Do you know how to make a solid research proposal that is within a set time frame and budget?
6. Do know how to write a clear research report, that is well-documented with source citations?
7. Do you know and follow the Genealogical Proof Standard (GPS)?
8. Do you attend genealogy institutes, national conferences?
9. What are your business skills? Do you have a business plan and license? How will you market?
10. What will you charge? What are your costs? What is your profit?

“Without hard work and discipline, it is difficult to be a top professional.” ~Jahangir Khan

How Expert Am I?

Take the *Genealogy Maturity Test*, developed by *The Ancestry Insider* to find out whether you are:

- Entry • Emerging • Practicing • Proficient • Stellar

Link to self-test: <http://www.ancestryinsider.org/2010/03/rate-your-genealogical-maturity.html>

The Importance of Networking

Networking with other professionals is one of the best ways to obtain clients, get insider information and make a name for yourself. Remember that the professional community is small, so conduct yourself like a professional on social media, in-person and at conferences and events.

Join Professional Associations and Genealogy Societies

- APG: The Association of Professional Genealogist; www.apggen.org
- NGS: The National Genealogical Society; www.ngsgen.org
- Join your local genealogical societies, as well as societies that are in your niche field.

Subscribe to at Least One of the Scholarly Journals

NGSQ - *National Genealogical Society Quarterly*, *NYG&B Record*, *New England Historic Genealogical Society Journal*, *American Society of Genealogists*, *The American Genealogist*

Genealogy Institutes

SLIG – Salt Lake Institute of Genealogy; <https://ugagenealogy.org/> ; SLIG Academy for Professionals

GRIP – Genealogy Research Institute of Pittsburgh; <http://www.gripitt.org> ; offers 2 separate weeks

GEN-FED – Genealogical Institute on National Records; <http://www.gen-fed.org/> ; research at NARA

IGHR – Institute of Genealogy and Historical Research; <http://ighr.gagensociety.org/> held in Georgia

Website or Book	Site Name / Author	Notes
https://bcgcertification.org/learning/skills/	Board of Certified Genealogists	Links to skill building articles
https://genealogicalstudies.com/	National Institute of Genealogical Studies	Methodology Course & Professional Skills Course
https://www.evidenceexplained.com/	Elizabeth Shown Mills <i>Evidence Explained</i>	Source citations quick lessons
Book: <i>Mastering Genealogical Proof</i>	Thomas W. Jones	Genealogical Proof Standard methodology
Book: <i>Professional Genealogy; Preparation, Practice & Standards</i>	Editor, Elizabeth Shown Mills	An absolute MUST for any professional genealogist
http://www.byui.edu/catalog/	BYU-I Family History	Online Associate Degree Program and FH Certificate
Book: <i>The Researcher's Guide to American Genealogy</i> - 4 th Edition	Val D. Greenwood	No matter your niche, this is for every professional
https://genealogyonline.bu.edu/	Boston University	2 Online Certificate programs, 7 weeks & 15 weeks courses
ProGen Study Group	http://progenstudy.org/	1-year Mentor-led study group studying the book: " <i>Professional Genealogy; Preparation, Practice & Standards</i> "
Certification study Group for CG - Certified Genealogist	https://thecdgseries.wordpress.com/the-series/	Study group to help members on the path to become Certified Genealogists
Accreditation Study Group for AG – Accredited Genealogist	http://www.icapgen.org/icapgenstudy-groups/	Study group to help members on the path to become Accredited Genealogists

Genealogy as a Business

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Building a Strong Foundation

- Reflect on your strengths and weaknesses. Knowing how you approach things and what does and does not work for you
 - Do you like to write reports or just research?
 - Do you like to teach others? Or share your knowledge in other ways?
 - Do you enjoy preserving the photographic and tangible artifacts from the past?
 - Do you enjoy presenting information in book form, in person or through multi-media?
 - Do advances in technology bring you fear or excitement?
 - Do you like working on your own or with others?
- Take advantage of educational opportunities regularly. Learn something new every day
- Periodically adjust your goals and practices to reflect your growth

Diversifying Your Talents and Skills

- The broader your base of knowledge, the more valuable you are to your clients. Whether you decide to work for others or yourself, the more you know, the stronger you become
- Learn to read basic words or understand the handwriting (script) in another language or time period
- Delve into a record you do not regularly use to better understand it
- Don't focus on just one aspect of genealogy, add specialties as your become more proficient

How do I Get Hired?

- Offer to work as an unpaid intern for a short time
- Find out what various employers specialize in and work towards those specialties in your education

How Do I Start My Own Business?

- Decide how you want to run your business logistically. Do you want it in your home? Do you want to do this part- or full-time? Where will your startup money come from?
- Business plans are a key to success in the business world and that includes even the smallest business owner. Taking the time to do them correctly will help you build a solid foundation for growth and continued success
- Begin to build your branding and find your market niche (focus). Knowing your competition is essential

How Do I Find and Keep Clients?

- Who is your ideal client? Beginners? Those who already have started, but need more help? Retirees? Someone that wants it all done for them?
- Start researching for your circle of friends and family to get a feel for the work – grow from there



- Communication is key. Listen to your clients and make sure they truly understand what you offer and how and when you will provide the product. Learn to manage their expectations.
- If your clients are happy, they will respect and value you and your services
- You may find that you do not enjoy working with clients directly. That's ok, we are all built a little differently. You can have an associate manage this aspect of your business or you can work for a larger company who may have employees that deal directly with the clients

Tips for Success

- **Network, network, network**. Most successful genealogists, no matter their emphasis, experience more success by word of mouth and networking with others in the community
- **Time management** - what might have seemed fine in your head, may not work well in "real life." Be sure to leave time for unexpected events like traffic, sick kids, or getting lost. In the end, find what works for you and implement it in your day to day activities
- **Accounting and finance** - you will need to "understand" these fundamentals even though you may ultimately hire others to do these tasks for you in the future
- Find opportunities to give back to the community. Volunteer at conferences. Offer to index records. Be an active part of a genealogical or historical society. Be a mentor to someone new in the genealogical community

Technology

Product	Website	Description
DropBox	https://www.dropbox.com/	Secure electronic file sharing, storage, & collaboration
Transcript	http://www.jacobboerema.nl/en/TranscriptBeta.htm	Document transcription
Genealogy database	Legacy https://legacyfamilytree.com/ RootsMagic https://www.rootsmagic.com/RootsMagic/	Standalone genealogy database programs
Toggl	https://www.toggl.com/	Time management app
Wave	https://www.waveapps.com/accounting/	Accounting app/software

Resources

The Genealogy Professional Podcast <http://www.thegenealogyprofessional.com/> hosted by Marian Pierre-Louis - highlights genealogy professionals in a variety of occupations as they provide their tips for success

Association of Professional Genealogists <http://www.apgen.org/> – member webinars

Year	Subject	Presenter(s)	Description
2016	The Art of Client Management: From Soup to Nuts, Part One & Part Two	Jeanne Larzalere Bloom, CG	Managing the expectations of our clients and building relationships
2014	One Size Doesn't Fit All: How to Survive and Thrive as a Genealogy Professional	Lisa Alzo	The many ways you can earn a living as a genealogy professional
2013	Duct Tape Marketing for Genealogy Professionals	Thomas MacEntee	Marketing using free or low-cost resources
2012	Avoiding Misunderstandings. Part 2: Communication Skills for Professional Genealogists	Jean Wilcox Hibben, CG	Tips on how to avoid misunderstandings

Which Credential?

Presenter: Anne Teerlink, AG®

Session: PH7232

*Reap the Harvest,
Gather your Ancestors*

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History

In 1964 two organizations were formed, one in Richmond, VA (Board for Certification of Genealogists or BCG) and another in Salt Lake City, Utah (International Commission for the Accreditation of Professional Genealogists or ICAPGen). Their purpose was essentially the same: to prevent fraud in genealogical research by providing a credentialing process and requiring those who received the credential to abide by a specific set of standards, guidelines, and ethics. Both organizations contain members of a governing board elected or appointed by the body of credentialed researchers.¹

Why Hire or Become a Credentialed Genealogist?

Both credentialing organizations take their missions very seriously and while each has differences in the process, it is important to remember that the goal is not one of perfection, rather of protection for those who are seeking to hire a genealogist. While there are many fine genealogists who are not certified, they are not beholden to a set of professional standards.

1. Credentialed genealogists have been through a thorough screening process and have signed ethics agreements and there is a system of accountability to hold them to those standards.
2. Credentialed genealogists are required to renew credentials every five years and are required to have educational opportunities along with preparing work that is consistent with the organization's standards.
3. Each genealogist is provided space on the credentialing organization's website, allowing clients to easily locate researchers who are qualified to work on their specific research problems.
4. Credentialed genealogists are often well-networked and if one researcher is unable to assist with a research problem, that researcher will likely know others who will be able to help.
5. The credentialing and renewal processes are strenuous activities that keep researcher's skills sharp and allows credentialed researchers to measure their own progress over the years and adjust rates based on experience and expertise to match those of others in their field.
6. Credentialing includes a certificate that may be displayed in a work setting, whether a private business, archive, government agency, or other corporate environment that helps provide greater job opportunities and instills faith and confidence in clients, employers and fellow employees.

¹ Board for Certification of Genealogists, "Fifty Years of Credentialing: Presentations Available," BCGCertification.org (<https://bcgcertification.org/fifty-years-of-credentialing-presentations-available/>; accessed 15 November 2018).

7. Archives and repositories may require a researcher to hold a credential prior to obtaining access to original record collections because they want to be sure the researcher will be respectful and not damage aged materials.

How to Prepare and When is it Time to Credential?

One mistake that researchers make when credentialing is to apply before they are prepared, and this is a very costly venture. Just because someone has decades of experience doing genealogical research does not mean that the researcher has been doing research correctly. Many researchers may understand partial concepts and leave out important methodologies when searching for ancestors. Each credentialing organization addresses the question of readiness in their own way and provides sample works by which credential hopefuls may measure themselves and their own works.

1. Study work samples and standards on the website for the credential of interest. Identify disparities between your own work and adjust your research, writing, or preparation of documents to meet the standards of that credential.
2. Study the states or regions included in an area of specialty and research important collections, record sets and time periods for those records. Locate and examine samples of each record to verify your ability to identify documents at a glance. While ICAPGen tests on specific regions, BCG also expects certified genealogists to declare regions in which the researcher has significant experience and allows clients to search based on regions or areas of specialty.
3. Take the time to study the scripts or languages for the particular region in question. Take a paleography course or locate paleography resources online and practice reading, transcribing, translating, extracting, and abstracting those records.
4. Attend genealogy conferences and look for classes that provide case studies, walking through difficult research problems.
5. Attend one of many genealogical courses or institutes available which place emphasis on deep-tissue genealogical education in a specific area, region, or specialty.
6. Locate books specific to the areas of research interest. Redbook, The Source, and similar publications provide a broad overview of record availability and are a wonderful reference.
7. Visit archives, courthouses, and other repositories on a regular basis and become familiar with their holdings. Take pictures of new record sets and learn what types of information are in each record set. Many records still are not available digitally. Credentials cannot be obtained by only searching for the easy record sets that may be located online.
8. Take a writing class or examine the reports of others.

Credential Side-by-Side Comparisons

1. Which careers may be better suited to one credential over the other?
2. Which credential is more difficult to obtain and why?
3. What is required for each credential?
4. What are the benefits and downfalls to holding both credentials?
5. ICAPGen: <https://www.icapgen.org/wp-content/uploads/2018/09/Guide-to-Applying-for-AG.pdf>
6. BCG: <https://bcgcertification.org/product/bcg-application-guide-free-download/>