

Hiring a Professional Do's and Don'ts!

Janice Nickerson shows you how to get the most bang for your buck when hiring a professional

There comes a time in every research project when you need to hire a professional. You may have reached an apparent "brickwall". Or perhaps you need access to records in a foreign country or a remote location you can't visit yourself. Whatever your reason, you may be wondering how to choose the right genealogist, what to expect, and how to get the most value for your money.

Choosing the Right Genealogist

The best person to choose will depend on your objectives. If you're really stumped, despite years of researching and studying, you need a very experienced genealogist who specializes in problem-solving and analysis. This person won't come cheap, but you'll be better off hiring him or her for 10 hours of top-notch expertise rather than hiring a less experienced researcher who may spend much more time without producing the results you need. Expert genealogical problem-solvers will never promise specific results, nor will they charge a flat rate. They charge for their time, usually in blocks of hours. Often, they will spend the first block of time analyzing the work you've already done in order to spot errors, gaps and other weaknesses that may be holding you back. In fact, they can sometimes break through your "brickwall" without doing any new research at all.

If, on the other hand, you're not really stumped, you just can't personally visit a particular repository to search the records you need, you need to find a researcher who regularly uses that particular repository and is willing to work as your record agent. A record agent doesn't plan the research or evaluate the results. He or she takes direction from you and finds the most efficient way to get the records you need. Typically, record agents charge lower hourly rates, or may charge flat fees based on the specific records you need. When searching for a record agent, look for people who offer "look ups" or "record searches".

In many cases, you won't be in either of these two situations, but rather, you've discovered that you don't know enough about the records that are available in a particular location or on a particular topic to be sure you haven't missed something important. In this case, you need a researcher who specializes in the area or topic.

Be wary of anyone who claims to be an expert in many different locations or topics. Anyone who does "North American" research, for example, clearly hasn't specialized enough to know the records of any particular location well. They may be an excellent choice for clients who have never done any research and don't wish to, but they're not your best choice if you have already made significant progress in your family research.

Where you look for the right genealogist will depend on what your objectives are as well. If you need someone familiar with American research, an excellent place to start will be the Association of Professional Genealogists, www.apgen.org. This organization also has members who research in other countries, but not in every country or specialty. One benefit of hiring a member of the APG is the mediation service offered by this organization. This will only become relevant if you need a dispute resolved, but it can be comforting to know that should the need arise, someone is available to help.

Another good place to look is *ExpertGenealogy.com*. This Internet service has listings for experts from around the world.

If you need a record agent who works in a particular library or archive, contact the institution directly and ask if they have a researcher list.

Most experienced genealogists have their own websites where their credentials, experience and expertise are described. If you're not sure what their initials mean, or how experienced they are, ask! No reputable researcher will be offended by your questions.

What to Expect

This is going to vary a great deal depending on who you've hired and for what purpose, but before you send your payment or deposit, you should know the basics. Your agreement, whether a formal contract or information letter/e-mail message, should include the following information:

- How long the research is expected to take
- What kind of report you will receive
- What fees you will be required to pay

Experienced researchers may have lengthy queues and you should be informed of this at the beginning. Some genealogists operate on a first-come first-served basis, completing one client's research and report before beginning the next. Others work with a handful of clients at a time, sending interim reports every few weeks or months, depending on the size of the project.

Record agents may be able to guarantee a quick turnaround, but if they work in multiple institutions, you may have to wait until their next scheduled visit. Ask for their schedule, if timeliness is important.

If you have special requests, be sure to ask. This includes any deadlines you might have.

All professional genealogists should provide written reports, with complete source citations for every record they examined. If you've asked for only a "look-up" or two, this report may come in the form of a one-page letter with copy of the relevant document attached. More involved research should result in lengthier reports, including descriptions of all the research undertaken, including "negative" searches (where the item sought was not found).

The format and style of the report will vary. If you have a preference for receiving your reports and documents in either hard copy or electronic form, you should ask about this before hiring the researcher. Similarly, if you want the researcher to enter the result of his or her research into a genealogical database for you, or produce a pedigree chart, or write up the results as a narrative for your family, you should request this in advance.

Hourly rates can vary a great deal. Less experienced researchers will charge less than experienced ones. Researchers who live in rural areas may be less expensive than those who live in large cities (reflecting the cost of living). People who do quick look-ups charge less than professionals who provide expert analysis.

If the researcher is charging by the hour, you can generally expect that all of his or her time on your project will be billable. This includes the time required to prepare a research plan, carry out research online or in archives and libraries, analyze evidence and prepare your report. If you ask for updates, expect that this time will also be chargeable. If your project requires the researcher to travel, expect to be billed for travel time as well. This is especially likely if your research involves places outside of North America or Western Europe.

Expense fees can also vary. Possible expenses can include travel mileage, accommodation when travelling, entry fees to archives, certificate fees, database access fees, microfilm rental fees, photocopies and postage.

Taxes May Also Apply

If you're hiring someone for a certain number of hours, it's a good idea to also set an upper limit on the total amount you're willing to pay, so you're not surprised by additional expenses that weren't in your budget.

Expect to be asked for a deposit up front. For a record lookup or very short project, you may be asked for the entire amount in advance. For larger projects, most researchers ask for 50 percent of the total amount in advance with the balance paid on completion. Very large projects may be handled by regular installments over the course of a year or more.

Getting Good Value

The best way to get the best value for your money, no matter who you hire, is to be as prepared as possible in advance. Gather all the information you have and put it into an easy to understand format. You don't want the genealogist you hire to have to spend a lot of time deciphering your handwriting, or trying to figure out what you already know.

You also don't want to pay someone to redo work you've already done. Make sure you clearly list the records you've searched, and what you were searching for at the time. If you checked the index to a set of records for the name "Stuart", but not "Stewart", say so.

While you need to make sure your genealogist has all the necessary information, you also don't want to waste his or her time with unnecessary information. So, don't send photographs of your children, or copies of every document you've ever found, just the ones that directly pertain to the problem at hand. If you're not sure what's relevant, ask.

My guideline is this. If a client asks me to identify the parents of John Smith, I ask for all the information the client has about John Smith, his wife, his children, and any brothers or sisters he may have had. I don't generally need to know about his second cousins or his great grandchildren.

Never hire more than one researcher to work on the same family at the same time without telling them! This is a sure way to waste time and money.

Also, once you've hired someone, don't keep working on the project yourself. There's nothing more frustrating to a researcher than to be half-way through a project and then to receive an "update" that changes the focus, or renders most of their work irrelevant. If you've placed an order for a birth certificate, or you're about to visit a relative who might have useful information, wait until you have the results to hire the genealogist, or tell him or her not to begin until you've sent them the new material.

Keep in mind that it is usually more cost effective to commission one large block of time rather than several small blocks. This is because less time is wasted shifting from one project to another and refreshing one's memory.

A Few More Tips

Try to be as clear as you can about your goal, keeping in mind that there may be more than one way to achieve your objective. So, for example, if you want to learn the names of John Smith's parents, don't just ask for his birth certificate. Ask for proof of his parents' names. Perhaps his birth certificate doesn't exist, but there are half a dozen other records that can provide the names of his parents. If all you ask for is the birth certificate, that's all you'll get (or won't get, if it's not available).

Don't ask for or expect guaranteed results. There's no way anyone can predict what the historical record will reveal, and you wouldn't want a researcher who "made up" results!

If you have a good experience with a genealogist, spread the word! You'll be helping the researcher develop a successful business and other clients make the right choice.

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