

Working with a Genealogist

What to Expect and How to Prepare

Whether your project is documenting your relationship to an ancestor for a lineage society, producing a family tree as a gift, or just getting help with a brick wall in your own research, at some point you may need the help of a professional genealogist.

A genealogist is someone who researches people, relationships, and history. In order to deliver their research, they also have skills in writing, which takes the form of research reports, relationship charts, and family history narratives, for example.

Whatever the end product is, the substance of your project is genealogical information that was properly researched and formatted. In some cases the sources that support the facts must also be delivered. For example, the sources are the most important part of documenting a lineage for membership in a society.

A beautiful family tree chart has no value if the people in it have incorrect information. You want this type of gift to be both beautiful and accurate.

What to Expect in Hiring a Genealogist

When you decide to hire a genealogist you will find that most work on an hourly basis and you must usually pay something in advance, either a portion, a retainer, or the estimated total amount. You will find a wide range of rates, some as high as hundreds of dollars per hour. Genealogists with many credentials, years of experience, and a busy practice can justify these high rates. Those who have fewer credentials and who may be just starting their business will usually work for lower rates until they have built up a clientele and can demonstrate their experience.

Typically, you would negotiate a block of time at a certain rate. The genealogist will work for the time you agreed upon and then deliver a report and any other deliverables you requested. The report should give you the results of the research work, a list of sources consulted, and if appropriate, a recommendation for what research would come next, if any.

One thing to keep in mind about research time is that it will usually take more time for each answer as you go back in time. For example, if you are starting your family history from your parents or grandparents, you might get multiple generations for just a few hours of work. But once you get back into the early 1800's, or earlier, the progress will be slower.

After each block of research time, you can decide if you want to purchase or negotiate another block of time to continue the research or project.

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Deliverables would be the work product you requested, such as a genealogy of your family, records and analysis for solving a brick wall or extending your family's history, a family tree chart, or a narrative story on your family.

Some other deliverables you might also request would be a database of the research, such as a gedcom, Family Tree Maker, or RootsMagic database. If your ultimate project is a family tree gift, you might need a gedcom file and a recommendation for a printing service, or you might ask the genealogist to order the final product for you as part of their work.

If your goal is to join a lineage society the genealogist may fill out the application for you if you request it. Some societies have very specific rules for the information needed to apply.

You will probably be asked to sign an agreement that describes the work to be done, the time allotted, and the items to be delivered to you. It is to your benefit to have as much detail as possible in this agreement.

If travel becomes necessary, for doing research at an archive for example, the client would pay travel expenses. This should all be negotiated before any work begins.

How to Prepare

As a genealogist's client you will need to provide background on the project and describe the goals of the project. This would be information about the family to be researched. Typically, it would be birth, marriage, and death information about the starting individuals. For your family tree, you might provide everything you know about your parents or grandparents, such as where they lived, their dates and full names, and so on. If you have already begun the research, a genealogist will want to review what you have, both to get a firm grasp of the starting point, as well as to avoid duplicating research that has already been done.

You need to be able to describe what you hope to receive back from the genealogist. Be as accurate and specific as you can to get the most for your money. A good genealogist will provide a research report describing the work that was done, including source citations and possibly images of documents.

For a lineage application, gather as many original documents as you have and provide copies to the genealogist. If you want to document a line to a specific ancestor, be sure to say so because you may have other ancestors that are easier (and therefore less expensive) to document. What you want to avoid is getting information back that you already have. That would be a waste of money.

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For a presentation type of family tree project you may have a family tree “art” design in mind. You’ll need to know how many generations the design can display so you don’t have blank spots or pay for more generations than you need. If you expect the researcher to also provide the end product, you should discuss this in your negotiations and clearly describe it in your agreement.

The Genealogist’s Credentials

Until recently there were very few formal education paths for genealogists. Most genealogists were self-taught researchers who were educated in other fields. Over the past twenty years or so the genealogy community has developed standards and codes of conduct for the profession.

There are many excellent professional genealogists who do not have certifications or degrees in history. Because certification is a rigorous process requiring a year or two of hard work and a significant time investment, many successful genealogists don’t see it as a necessity or they can’t justify setting aside paid work to put their time into certification work.

Some genealogists may see it as a valuable credential so they divide their time between client work and professional development and simply haven’t completed the certification process yet.

At a minimum a professional genealogist carries memberships in genealogical societies and associations, which are a business investment.

The Genealogist’s Tools

Genealogists use a variety of record sources in doing research. Some of these are online services, both free and fee-based. In addition to these, they make use of record repositories, such as courthouses, libraries, genealogy society libraries, and government archives.

Some of these have costs associated for which clients may be billed when the fees are directly attributed to that client’s project. An example would be paying for copies of records at an archive that doesn’t allow scanners or photos.

These days, genealogists use software products to organize and record their research. Some of these products might be database software, file sharing products, scanners, and collaboration tools.

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The most important tool used by professional genealogists is continuing education. There is always something new to learn, whether it is keeping up with evolving standards or learning new technologies, like using DNA for establishing relationships.

About Laterra Genealogy Services

Cathy Martin Finnie started her genealogy business, Laterra Genealogy Services, in January 2016 after retiring early from a career in Information Technology. She has been doing family history research since the 1980s.

Formal Genealogical Education

Boston University Genealogical Research Certificate Program 2016

Excelsior College Advanced Genealogical Research 2017

Institute of Genealogy and Historical Research, Samford University 2016
Writing and Publishing

Institute of Genealogy and Historical Research, University of Georgia 2019
DNA as Genealogical Evidence, Advanced

The DAR's four GEP/DNA courses 2018-2019

Cathy Finnie's Professional and Society Memberships

The National Genealogical Society

The Association of Professional Genealogists

The Genealogical Society of Rowan County

Old Buncombe County Genealogical Society

First Families of Old Buncombe (Lineage Society)

National Society Daughters of the American Revolution (The DAR)

Many others...

To learn more, visit www.laterragenealogy.com or contact Cathy via email at cathy@laterragenealogy.com.