



Employing a Professional Researcher: A Practical Guide

Thanks to recent TV programmes and ease of access to online resources recently we have seen an enormous expansion of interest in genealogy and family history. Since a supply soon springs up to meet a demand there has also been an expansion in the number of people offering to trace ancestors for payment; undoubtedly these include the usual percentage of newcomers who have a good head for business, a little knowledge of the subject and are eager to jump on any bandwagon.

This is no new phenomenon. The College of Arms was set up in the 15th century because newly-rich families were using coats of arms to which they were not entitled and in the 19th century there was a steady trade in ‘tracing’ aristocratic ancestries for the middle classes. Most families have a certain amount of information about their origins and this may be supplemented by a great deal of flattering tradition. Even these days when we like to think we have outgrown that sort of snobbery, many people approach a professional ‘knowing’ they are descended from some well-known historical figure and just wanting him to ‘fill the gap’.

Many people who would like to know about their ancestors are perfectly willing to pay someone else to do the work and simply admire the finished article. Far more, many of whom are members of the Society of Genealogists or family history societies, essentially love to ‘do-it-themselves’. Either way, why pay anyone else to do work you can perfectly well do yourself?

Reasons for using a professional

There are three reasons why it may suit anyone to call in a professional:

For advice. In the nature of the case most amateurs are working on only one ancestry - their own. They can get help with the basic problems from online forums, textbooks, lectures at their local family history society or by chatting to friends. Professionals, because of the many cases they have handled, are likely to see clearly the way to tackle a problem which baffles the relative beginner. They know which websites to use, where the records are, what they contain, how likely they are to help and can suggest new lines of attack if the initial ones fail. They are also likely to be realistic about admitting failure when the amateur, who after all is emotionally involved, feels in his bones that something is true and that proof simply ‘must be somewhere’. A professional assessment of your case can save a lot of wasted time.

For particular skills. You may know perfectly well what needs to be done without being able to do it. Many people are hindered in tracing ancestors before 1700 by not knowing Latin, being unable to read the old handwriting or understand the legal terms; others are put off even beginning by lack of familiarity with record office and library systems.

For cheapness or speed. Many people live far away from the areas where their ancestors lived and yet most of the original records relating to any area of England will be found in that area or in London. If you have to use your holiday, pay out for petrol or rail fares, book accommodation and buy meals, you may find that two or three days research at the other end of the country can be very expensive. If you know fairly clearly what needs to be done it is probably cheaper to employ a researcher to go through certain parish registers or extract particular wills than go yourself. Moreover if you intend to go yourself, you may have to wait for the summer and persuade spouse or children to go with you. By employing someone else to do the donkeywork you can use the results at home in peace and spend the warm summer days tracking down the ancestral farm or visiting newly found relatives. Employing a professional after all need not mean that you miss out on all the fun of tracing your ancestors. If you get a researcher to do the routine work you still have all the satisfaction of sorting the results and deciding what to have done next. Where is the fun in searching back twenty years in an unindexed register for a particular marriage or going through every Taylor will, say for a 30-year period to see if anyone mentions 'my son Christopher' or searching thirty years of burials for a large London parish, if you don't trust the online indexes, 'in case the widow died there'? It is very sensible to get someone else to do it for you.

The costs involved

In genealogy, as in so many other types of 'do-it-yourself' work, you either spend your time or your money. Some people have plenty of time but can't afford to spend much money. Others can afford to spend the money but not the time.

So how much does it cost to hire a professional? Most professionals charge on a basis of an hourly rate and these may vary from say £20 to £50 per hour and perhaps more or less. To understand why there should be this wide variation, it is necessary to bear in mind the two very different categories of people who are 'professional' genealogists. The first category is those who take their whole living from the work. Their hourly rate has to include calculation for such things as tax, National Insurance, depreciation, rent of premises and secretarial help. The second category is those who do not have to live on their income. They are usually either retired people on a pension or who may have another income stream and genealogy is a secondary activity. They don't do enough work to pay tax, they work from home, use the family car and therefore, from the business point of view, are often heavily subsidised without realising it. They don't need to charge much because they view their charges as almost wholly profit. They are honest and charge only what they feel they need to. They are not undercutting the full-timer to put him out of business; they just do not understand what expenses the unsubsidised professional has to meet.

What makes a good professional?

From the above it should be clear that cheap professionals are not providing shoddy goods and that expensive genealogists are not by that token exorbitant confidence tricksters. Good genealogy is a question of experience and possession of a certain type of logical mind;

record-searching is a question of expertise, concentration and thoroughness. For any particular repository there may only be a few professionals available, and it is a matter of luck whether they need to charge 'properly' or can afford to sell you their time cheaply.

Finding a professional

So how can you find a genealogist and how can you check if he is reputable? An excellent method is personal recommendation, but then your friend's problems may be quite different from yours and it really is not sensible to ask an archive researcher in one part of the country to take on work in another. Many professionals advertise in popular genealogy magazines such as *Family Tree Magazine*, *Your Family Tree*, *Your Family History* or *BBC Who Do You Think You Are?* (and elsewhere) but of course most publications will take advertisements from anyone who pays and there is no law in this country to prevent a complete beginner from setting up a business in professional genealogy by the simple means of inserting advertisements. The fact that you respect the publication doesn't mean that the advertiser is respectable, though the advertisement may be carefully worded.

The Society of Genealogists, concerned about this, accepts professional advertisements in its own magazine and online research directory only if the advertiser has been a member of the Society for more than five years or is a member of the Association of Genealogists and Researchers in Archives. This means that at least the inexperienced are excluded, but the Society does not take any responsibility for the quality of the work done and membership or Fellowship of the Society in no means constitutes a qualification or mark of competence. Some record offices, including the National Archives still issue lists of researchers known to them, but these lists generally consist simply of researchers who have asked (or paid) to be included. They are usually not vetted in any way and most record office lists include a paragraph disclaiming any responsibility. Let the buyer beware!

The Association of Genealogists & Researchers in Archives

Back in 1968, when the world of genealogy was much smaller but the problems were the same, six well-known genealogists set up what was then known as the Association of Genealogists and Record Agents (AGRA). They wanted a forum for discussion amongst professional genealogists and a means of representing to government and they were also concerned to establish a Code of Practice and a means whereby the public could tell whether anyone who advertised was experienced and reliable. Over the years AGRA has expanded to over 100 members. Beginners are not accepted so the members are all experienced, have produced good references and extensive samples of their past work, and by taking up membership have agreed to be bound by the Code of Practice in all their future work. AGRA members usually have had two years full-time or the equivalent part-time experience in paid research. Alternatively, they may hold a relevant qualification in a related discipline. Associate membership was introduced in 1992 to provide guidance and support for those not yet ready for full membership.

So why should the public use an AGRA member whenever possible? AGRA is the only independent organisation in UK genealogy which will follow up a complaint. It is nice to think that all AGRA members are expert and honest but there are certainly excellent professionals who are not yet members. A client, especially working from abroad, is very much at risk. What do you do if you send off money and hear nothing or receive a report which you can see is not satisfactory? If the researcher is an AGRA member, the Secretary will take up the matter on your behalf. The Council of AGRA will judge in the light of the Code of Practice and, if the researcher is deemed to have acted in an unprofessional manner, AGRA can bring substantial pressure to bear. You're never absolutely safe but

you're safer with an AGRA member. Inevitably problems do crop up in any company and delays can occur for unavoidable reasons, but most can be sorted amicably without resorting to legal action. Perhaps the client might ask for some compensation – perhaps in the form of a little extra work free of charge as recompense for disappointment. If still not satisfied, than like any consumer a client has the benefit of normal local trading standard agencies and the small claims courts.

The AGRA website www.agra.org.uk has information about its members who work in England and Wales and is the preferred method of communication with the organisation and its members. AGRA has no offices, however the Society of Genealogists offers a postal box service for AGRA and letters may be directed to AGRA c/o the Society of Genealogists. The AGRA website gives guidance as to how members might join and the Code of Practice that binds them. The site enables the public to find researchers by name, by the area where they live and work or by specialisms such as intestacy or palaeography. The contact details of each member are given, along with email addresses and links to websites. The advice pages give further information about how researchers work and charge for their services and are well worth reading.

AGRA has a partnership with the Scottish Association of Genealogists and Researchers in Archives which has a website <http://www.asgra.co.uk/>. The Accredited Genealogists of Ireland (formerly the Association of Professional Genealogists in Ireland) can be found at <http://accreditedgenealogists.ie/>. Both operate in a similar way to AGRA. Other countries have similar “professional” organisations that offer some security when engaging their members. These can often be found by making an internet search or by following links from CyndisList.com.

Briefing a genealogist

Having selected a professional from the AGRA list or elsewhere how should you approach him and what should you expect of him? Write a first email or letter asking whether the researcher will take your case and setting out the relevant details of the problem. You should set the information out clearly, distinguishing between what is quite certain and proved, what is true only on the basis that uncle George said so, and what is theory. Send as much information as you can but only relevant information; there is no need to include a tree showing the connections down to the present day or interesting facts about the grandchildren. The best plan is to analyse the problem for yourself clearly on paper and send the researcher a photocopy of your analysis; if he won't take the case or you don't want to employ him it will be easy to send another copy to a different researcher. Ask the researcher if he thinks he can help, what his terms are and how long it will be before he can do the work. Do not send any funds at this stage but if you expect a reply by post always include postage in English stamps, International Reply Coupons or cash.

Briefing a record searcher

If you only want to employ a researcher to act on your explicit instructions there is no need to set out the problem. Simply state the records you want searched with dates and whereabouts, and ask the researcher the same questions as above. Always keep a copy of your letter or email. Never send original documents in a first letter nor is there any need to send a substantial unsolicited sum of money. Do not enclose small cheques in foreign currency since British banks will not always negotiate these. Even if he or she is too busy or not interested in your case, the researcher should acknowledge your letter, so, if you do not hear within a few weeks, you should write again in case your first letter went astray. Remember, if the researcher did not answer the fault may be yours - no return address, no

return postage, garbled account of your problem. Many clients want to start the work far too early with, say a nebulous great-grandfather. Others working from abroad start research in England long before they have exhausted sources in the country of immigration. Still others generalise thirty years to a generation and assign unproven dates of birth to distant ancestors who 'may have come from Warwickshire or Suffolk'. A professional genealogist is like a detective: he works from the known to the unknown.

Negotiating a fee

Most researchers on answering a first letter or email will give an idea of their charges. This will normally include a statement of their usual hourly rate. Clients who have no knowledge of genealogy often ask for an estimate for a whole family tree or insist they 'won't pay more than so much per ancestor'. In fact it is often not possible to estimate in advance how difficult or how time-consuming a case will be. Very many researchers invite the client to specify an initial sum which he is willing to spend - perhaps equivalent to one or two days' work. It is possible that the genealogists might ask for some money paid up front to be used towards the cost of purchasing certificates or to analyse the problem. The researcher having laid out that time and money puts in a report of the successes or problems, with suggestions for further work. It may be that a morning's work will take a family back 300 years in the same small village or that months of work won't prove where 'your' John Smith was born about 1860. By putting down the money a little at a time the client can safeguard his pocket and turn the research from this branch to that, giving up Dad's side when it gets difficult or trying Grandma's side again when the previous disappointments have faded away and hope springs afresh. The hourly rate quoted will normally include not only time spent looking at documents but time spent on correspondence, phone calls and general advice. You should expect to pay for all the time a researcher spends on your behalf, so that, if you require him to visit a particular church because the incumbent is hanging on to the records you must expect to pay not only his travelling time and the Vicar's own charges but the whole business twice if the Vicar fails to turn up or cannot produce the correct records. Some clients are inclined, wrongly, to imagine that when nothing is found there is nothing to pay. On the other hand, you should expect the researcher to follow your instructions (unless you give him a free hand), not to exceed the financial or other limitations which you set, and to report on time, setting out clearly the evidence and the conclusions to be drawn from it. Since professional genealogists cannot usually afford to enforce payments of debts (especially abroad), almost all insist on money in advance except from established clients. Most genealogists should at least be able to accept card payments via Paypal or by Sterling cheque.

Forms of report

When dealing with original documents most record offices require notes to be taken in pencil and many researchers, both professional and amateur, use systems of abbreviations to save time. The professional, as a matter of course, will type up a fair copy of his extracts and charge the time involved: if you don't want this you may ask him to send you his rough notes but you must not then complain that they were 'scrappy and unprofessional'. The report may include a pedigree showing the relationships of the people concerned. The researcher's report should include details of everything that was searched including those sources where nothing helpful was found. These lists of 'nil returns' are often the most dispiriting in genealogical research but remember that it is no quicker to search 20 years of baptisms and not find an entry than to find a series. Citations within the report should enable anyone to find and recreate the genealogy from the sources used and allow the reader to follow the reasoning leading towards any conclusions.

Conclusion

To employ a professional genealogist can be as easy and as useful as employing a plumber or an accountant. It should be approached in the same way; the pitfalls and problems are of the same type. Choose your professional carefully, and then give him or her the right instructions for your genealogical and financial circumstances.

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