

Employing a professional researcher in Great Britain

With the Internet it is now possible to access quite a lot of original records online, to consult indexes and make contact with other people researching the same family. However, the time may come when it will be more convenient to employ a professional researcher.

Most of the points that follow came from an article by M.J. Gandy, published in the *Genealogists' Magazine* Vol. 20, No 7, September 1981. Despite the time lapse, the points made are still valid. The *Genealogists' Magazine* is the journal of the Society of Genealogists, one of the leading genealogy organizations in the UK.

Prepare in advance

Before any research, whether carried out by a professional researcher or by yourself, you should collect as much information as possible. If you are just starting your research, you should consult older relatives about what they know about the family history, and obtain names and approximate dates relating to family members. You may be able to check some of this information yourself by visiting a record office or possibly via the Internet.

In some cases there is no one to ask. You have to start with your parents and work backwards. But you will enhance your understanding of your family if older relatives can provide some insights into the character and actions of earlier family members.

Before recruiting a researcher, you should make sure that any family tree you have already established is sound. If you have constructed a family tree primarily by using the IGI and Internet sites rather than original sources, it would be better to get the researcher to check your work before you commission research on earlier generations of an unverified family tree.

The IGI is an index compiled by many people. It can provide excellent leads, but it should not be regarded as definitive information.

Scotland's People (<http://www.scotlandspeople.gov.uk/>) is an excellent website, which provides access to a number of original records.

Reasons for using a professional

- (a) For advice: Professionals who have worked on a large number of cases are likely to see the way to tackle a problem that a relative beginner may find baffling. A professional assessment of your case can save a lot of wasted time.
- (b) For particular skills: You may need help in reading Latin or old handwriting.
- (c) To save money and time: If you live far away from where your ancestors lived, it can cost a lot of time and money if you have to pay for fares, accommodation and meals in order to carry out research. If you know fairly clearly what needs to be done, it is probably cheaper to employ a researcher. You can then study the results at home and spend holiday time visiting ancestral sites. And you can still take decisions as to what the next stage of the research should be.

Costs

It should be noted that some professional genealogists earn their whole living from their work and their costs have to include such things as tax, National Insurance, transport, etc. A second category – retired people or married people who do not need to earn a full income – may have lower overheads. However, you may not have much choice about rates in certain geographical or subject areas if only one or two researchers are available.

What makes a good professional?

Good genealogy is basically a question of experience and having a certain type of logical mind. Record searching is basically a question of expertise, concentration and thoroughness. The researcher needs a good knowledge of the records and the historical background.

Finding a professional

A personal recommendation can be an excellent method, but your friend's problems may be different from yours. It is not a good idea to ask a genealogist in one part of the country to take on work in another. Some UK record offices have lists of researchers but they are not able to vet the work of the

people concerned. Many genealogy publications carry advertisements, but there is no indication that the researcher is reliable.

The Society of Genealogists currently states in its magazine that all advertisers for genealogical research services are expected to provide an acceptable standard of service. Failure to do so will result in the refusal of future advertising. The Scottish Genealogy Society has only recently started accepting advertising for things relevant to genealogy.

The Association of Genealogists and Record Agents (AGRA) and the Association of Scottish Genealogists and Record Agents (ASGRA)

The Association of Genealogists and Record Agents was set up in 1968. The Association of Scottish Genealogists and Record Agents was set up in 1981. Both associations have established a Code of Practice and mention of 'AGRA' or 'ASGRA' in an advertisement is intended to show the public that the researcher is experienced and reliable. Beginners are not accepted. The members are all experienced, have produced good references and extensive samples of their work and have agreed to be bound by the Code of Practice in all their future work. AGRA and ASGRA will follow up a complaint about one of their members.

There are very good professionals who are not yet members. However, if you are commissioning research from abroad, you may wish for some assurances when you send off money. If the researcher is an AGRA or ASGRA member and is judged to have behaved unprofessionally, the associations can bring considerable pressure to bear.

When approaching a professional researcher the same considerations apply as when hiring any other professional, such as an accountant. When considering researchers who are not AGRA/ASGRA members, you might wish to ask what they would do if you are not satisfied with the quality of the work.

Genealogist or record agent?

In general a **genealogist** acts as consultant, sets the line of inquiry and initiates and supervises the work, some of which may draw on work by others. He will then report to the client and suggest possible lines of further research as appropriate.

A **record agent** searches specified records for particular information as required.

Many AGRA and ASGRA members act in both capacities. The lists of AGRA and ASGRA members will indicate areas of specialization such as parish registers, translations, legal searches, etc.

The link to the AGRA website is <http://www.agra.org.uk/>

The link to the ASGRA website is <http://www.asgra.co.uk/>. The ASGRA site provides a useful list of links for tracing Scottish families.

Both websites provide lists of members and explain how to contact them. The AGRA site publishes the Code of Conduct.

Briefing a genealogist

Write a letter or e-mail asking whether the researcher will take your case and setting out the relevant details. You should set out the information clearly, distinguishing between what is certain and proved and what is only a family story. Send as much information as you can, but only relevant information.

The best plan is to analyse the problem clearly on paper and send the researcher a copy. It can always be sent to another researcher if s/he is not able to take the case. Ask the researcher whether s/he thinks s/he can help, what the terms are and how long it will be before s/he can do the work. You can contact researchers by e-mail if an address is provided. If you send a letter, always include postage in International Reply Coupons or UK stamps and make sure your address is written clearly.

Briefing a record agent

Here you need only set out the records you want searched with dates and whereabouts and ask the researcher whether s/he thinks s/he can help, what the terms are and how long it will be before s/he can do the work.

Negotiating a fee

Many researchers invite clients to specify an original sum they are willing to spend – perhaps equivalent to one or two days' work. The researcher will do the work and then report on the successes or problems, with suggestions for further work. It may be possible to trace back a family several generations in a parish in one morning but you may also find that months of work will not prove where your John Reid was born around 1750. By paying out smaller sums at a time, you can safeguard your pocket and perhaps turn the research to a different branch of the family.

ASGRA gives the current rate for research as £20 an hour, including entry charges into Register House in Edinburgh, but fees will depend on the type of work. AGRA researchers' rates are probably similar.

Some general points

- Keep copies of all correspondence
- The researcher should acknowledge your letter or e-mail so if you do not hear within a few weeks (less time than that with e-mail) you should write again, making sure your contact details and statement of the case are clear.
- You should make sure you have properly documented your father and grandfather before seeking information about a nebulous great-grandfather.
- If working from outside the UK, you should always complete research from the sources in your own country before starting research in the UK.
- You should expect to pay for all the time a researcher spends on your behalf, including correspondence, telephone calls, general advice and travelling to different record repositories.
- As professional researchers usually cannot afford to enforce payment of debts, almost all insist on money in advance, except from established clients.

Reports

- You should expect the researcher not to exceed financial or other limits and to report on time, setting out the evidence and conclusions neatly.
- The professional will as a matter of course type up a fair copy of his extracts and charge the time involved. You can request the rough notes instead but you must not then complain that they are scrappy and unprofessional.
- The researcher's report should include details of everything that was searched, including sources where nothing was found. You have to pay for the time involved whether a lot or very few entries are found, as it takes just as long to go through the records.

You do not have to recruit an AGRA or ASGRA researcher. You get extra guarantees with an AGRA or ASGRA researcher but there are other good researchers. However, you should follow a similar procedure, whichever researcher you approach.

If you choose your professional carefully and give the right instructions for your financial and genealogical circumstances, you should hope to get a good professional report revealing more about your ancestors.

Postscript: professional researchers in the United States

For those wishing to hire a professional researcher in the United States, the following addresses are suggested.

There is a Board for Certification of Genealogists (BCG) which issues a 'CG' Certified Genealogist certification: <http://www.bcgcertification.org>

There is an International Commission for the Accreditation of Professional Genealogists (ICAPGen) which issues a rating of Accredited Genealogist (AG): <http://www.icapgen.org>