

"The Professional's Voice"

March 2015

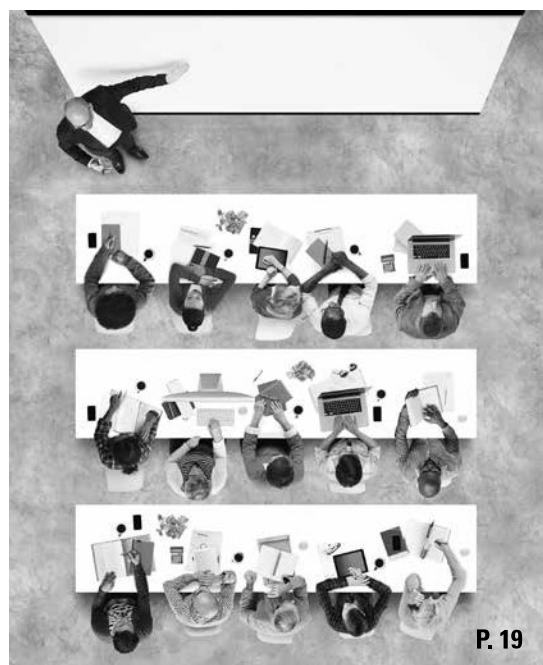
Association of Professional Genealogists

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PREPARING A COURSE





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Profiles of Thought

BY KYLE INGRID JOHNSON

The Professional Profiles column offers a way to get to know our many members. Each issue, four or five genealogists from across the globe share their thoughts on a variety of topics and issues of interest to our membership.

Our participants for this month are:



Autumn Baccellia

Autumn Baccellia lives in Sacramento, California, and has been researching professionally for over ten years. Her specialties include living relatives' research, obituary searches, and military records to name a few. She is currently a student of anthropology and history and is also working on a family history book. She is accepting new clients and would like to work with other APG members as well.



Ruy Cardoso, CG

Ruy Cardoso lives in Newton, Massachusetts, and has been researching professionally since obtaining the Certified GenealogistSM credential in 2010. He was recently elected to the APG Board of Directors for 2015–16. He concentrates on New England research from the 1700s to the 1900s with occasional forays into other areas, and he also takes on research in Portuguese parish records, of which he has compiled many thousands. Ruy would happily offer his services in either of these areas to other APG members. Further information appears at his website <www.newenglandcousins.com>.



Paul Graham, AG, CG

Paul K. Graham, AG, CG, lives in Salt Lake City, Utah, and works as a research manager for AncestryProGenealogists, the research division of Ancestry.com. He has been researching professionally for twelve years and has published multiple books and articles about Georgia families and records. He has many research interests, but his primary specialization is in genealogical problem solving among southern families.

How would you describe yourself in addition to being a professional genealogist? Do you have other occupations or activities that go along with and/or complement your genealogical work? If so, how do the two work together?

Autumn: “I grew up Mormon and was taught genealogy at an early age and have been in love with it ever since. I have a degree in anthropology and received a certificate in Egyptology. I’m currently in school. I love to research and dig deep to find answers. I was introduced to genetic genealogy back in 2005. I found it fascinating and had to be tested. I believe



Diane Kelly Runyon

Diane Kelly Runyon lives in Worthington, Ohio, and has been doing genealogical research since 1974. Her specialties are Ohio, Pennsylvania, West Virginia/Virginia, Kentucky, Ireland, and the area of European immigration. She has also researched in Ireland, Denmark, and the Netherlands. Diane would like to offer services to other APG members for Ohio record lookups. She lives near the Ohio Historical Society and other repositories for Ohio records. She visits these facilities at least once per week and feels it is never a problem to do a lookup for a colleague.

my studies give me another mindset when doing genealogy research.”

Claire: “I volunteer to help families plan and execute Confederate States of America memorial and headstone dedication services. I have met many wonderful people and learned so much by participating in this cause. As a former



Clarise Soper, CG

Clarise (Fleck) Soper, a Michigan native, has lived in Mississippi for twenty-five years. In 1978, she started tracing her ancestry and began researching professionally in 1995. She left employment at an accounting firm in 2007 to work full-time as a genealogist. Clarise, a U.S. Army veteran, became board-certified in 2014. She specializes in the states of Mississippi and Alabama, particularly in the Civil War era. In addition to client work, she speaks at societies and libraries. Clarise was the founding president (and is current vice president) of the Jasper County (MS) Genealogical and Historical Society and volunteers with the *ProGen* Study Group Program.

member of the Armed Services, I believe firmly in honoring our nation's soldiers, past and present. This activity has also increased my network of local colleagues and broadened my knowledge base immeasurably.”

Diane: “I am a historian. I taught history for almost thirty years and was

Ohio's History Teacher of the Year in 2012. I have two master's degrees and have attended the Yale Graduate School in Early American History. Presently, I am in the research phase on a book about the Melungeons. Along with my genealogical and historical research business, I have a company that restores grave sites for clients. This is a service that is offered to my clients on my website <www.lineagelinks.com>. I am a public speaker and historical interpreter. I perform Mary Lincoln in *My Life with Abe*, which is a conversation about their relationship before the run for the presidency. I also teach courses on genealogy for my community.”

Paul: “Although the word *genealogist* largely defines me professionally, I also think of myself as a historian, biographer, and geographer. The ability to understand people and the places they lived is integral to documenting families. My interests come from a long-time fascination with small-scale history, which I can trace back to reading the stories of Laura Ingalls Wilder. No matter how mundane things may seem on the surface—particularly when historical records provide limited details—something extraordinary is usually revealed with a little digging.

“One of my activities related to these interests involves exploring places, and not necessarily faraway places. Single trips to exotic-yet-distant locations only allow for a glimpse at the surface. I am drawn to explore the place I live, as close as my own neighborhood and out to the broader region. Having a full experience of a place—not just for what it is, but what it was—makes it possible to better

imagine the life experiences of others. Bringing that sensibility to my work is the key to answering many genealogical questions.”

Ruy: “I have been a casualty actuary for thirty years and have had a solo consulting practice for fifteen, primarily concerning automobile insurance. My actuarial work has taught me several skills that carry over nicely to my genealogical work: careful attention to details, evaluation of ambiguous evidence, consideration of alternative explanations, using plain English to explain technical results, presenting conclusions that can stand up to scrutiny (actual cross-examination sometimes!), and maintenance of good client relationships.”

You are approached by two prospective clients. One wants you to research for and prepare applications to a lineage society. The other wants you to try to find out her real birth parents. You can only take on one job. Which would you choose and why?

Autumn: “This is tough since I would love to take on both and would try to find a way to do so. Gathering up records for a lineage society is exciting, especially with all the fascinating things that could be found along the way. It’s also a wonderful way to show honor to our ancestors. I belong to several lineage societies and feel they connect me closer to my ancestors. That being said, if I had to choose it would probably be helping the prospective client find out about her biological parents. I love digging deep into research and have a great talent for finding living relatives. I love connecting family together. I feel that someone seeking their biological parents and being

able to help them and get them united with their biological parents and family makes it the most satisfying feeling you can get.”

Claire: “I would take the lineage application project. Several years ago, I accepted a job to find the client’s birth father. Although that search was successful and resulted in a happy reunion, I was concerned throughout about the possibility of a different outcome. Consequently, I prefer historical research, wherein any unfortunate news is in past rather than a current reality.”

Diane: “If I had to choose between doing lineage papers or birth parent research, I would choose researching for the lineage society because I have been a member of the DAR for twenty-eight years. By belonging to this lineage society, I receive many contacts for my genealogy business from my DAR sisters. I have found that researching a family and re-creating their life’s journey provides pride for my clients. There are so many stories to be told. Once you have finished your own papers for one of these societies, you have a grasp of what it entails. This type of research definitely would need a contract with the client because it can be fairly expensive and the expectations must be defined. I do not provide birth parent research because it can be an emotional slippery slope. I have done a few in the past, but that would not be my first choice for genealogy work.”

Paul: “Every professional genealogist has preferences about the types of research they take. They also have to make decisions about specialization—do they work to become the best in a specific topic or geographic area, or do they develop broader knowledge in order to accommodate many types of projects? Does the professional become known as someone who does lineage society applications, developing a specific market but leading other prospective customers to go elsewhere? These can be difficult questions to answer.

“By drawing on my own skills and those of my colleagues at AncestryProGenealogists, I would be able to take both projects, and I would want to take both because they interest me for different reasons. Lineage society applications offer the chance to conduct research in a wide range of time periods and geographic locations. Helping someone find their birth parents is particularly rewarding because of the highly personal nature of the work. If I was forced to choose, my honest response would be to flip a coin.”

Ruy: “Both projects are attractive, though in different ways. On one hand, lineage work is appealing because it involves research covering a long time period, thus requiring a nice variety of techniques that stretch the genealogical muscles. On the other hand, the birth parents project could be immensely gratifying on a personal level. Lineage work can be emotionally satisfying in its own way, of course, and birth parent research requires its own kind of intellectual stretching as well as the skills needed to navigate through numerous legal and psychological perils. But if I had to choose, I think the birth parent project would win out. Let’s put it this way: which project would make for a more memorable story? As much as I enjoy compiling lineages, few people are wowed by a nicely proven descent—sad, I know, but true. The uncovering of a lost family connection simply calls to people more deeply.

“Fortunately, I am not limited to such choices in real life, and some projects provide intellectual and emotional satisfaction in equal measure. For example, I have had assignments involving descent-based college scholarships that led to students each receiving more than \$200,000 in scholarship money. I especially remember an e-mail from the client on the first of those projects; he had written to say that he and his family were ‘in shock’ when they got the good news. Now that was a project with more than one kind of payoff!”

Do you think colleges and universities should offer bachelors' and masters' degrees in genealogy? Is this the direction the field is heading? What would our profession gain or lose if this were to happen?

Autumn: "I know that BYU [Brigham Young University] offers a bachelor's degree in family history. It would be nice to see other universities offer such programs. I don't think the field is heading in this direction. It's hard to say. I believe that education and knowledge doesn't come directly from colleges or universities. I feel that if a person is passionate in their field they will study beyond what is required and can become just as successful or even more so in any field they choose. I believe that learning is a never-ending process. On the other hand, a university curriculum with sufficient rigor could lend the field more credibility to skeptics, and perhaps integrate new ways of doing research such as a deeper understanding of genetic research."

Claire: "Yes, I do believe colleges and universities should offer genealogy degrees. I am hopeful that certificate programs now offered by colleges (like Boston University and Brigham Young University) will eventually lead to genealogy degrees. Currently, Brigham Young offers a bachelor's degree in family history under its history department so there is hope that other institutions will see its merit. Our profession would gain, obviously, if the study of genealogy achieved status as its own academic endeavor."

Diane: "I believe if a university decides to offer a degree in genealogy, it should

be a minor in the history department. Without a clear understanding of history, you probably are not as effective working as a genealogist. Genealogists have a passion that is unique to the business. I believe that in our profession we are always learning. I still take classes so I can stay sharp and there is always something new to learn from other professionals. You need to be open to new ideas and strategies to be on top of your game. So I am neutral, as far as whether it will affect our profession."

Paul: "In my ideal world, genealogy would be offered at universities as bachelor's, master's, and doctoral degrees. It would be situated in history departments, with significant cross-disciplinary studies. Coursework would be centered on genealogical methods, but could encompass many topics within the humanities, based on each student's interests. Studies in genetics would be integral to the degrees. Many universities already provide opportunities to study families, usually within history and sociology departments, but only Brigham Young University offers a full bachelor's degree in family history.

"I do not see the field moving this direction in a significant way, primarily because of the inability to staff numerous programs and fill them with students. Among accredited institutions, there may be capacity for two universities to offer a full range of genealogical studies—say, BYU and Boston University (which offers a non-credit certificate program). A larger group of colleges would be able to provide certificate programs. Whatever shape these programs took, they would provide opportunities for structured learning, which would only have a positive influence on the field."

Ruy: "I simply cannot see any disadvantages to programs that will advance genealogical education, including degree programs. That said, I do not foresee such degrees being

required any time soon, nor do I sense much current demand for them by the purchasers of genealogical services. I nonetheless think they would make a good addition to our educational opportunities.

"Now while I do see value in degree programs—possibly great value—I do not think they should be required for certain kinds of genealogical work. I come back to my actuarial profession as a point of comparison. There are certainly colleges that offer degrees in actuarial science, but the vast majority of practicing actuaries have degrees in other subjects, albeit related ones: mathematics, economics, and business, for example. No doubt these studies help actuaries get through their exam-based credentialing process, but the particular subjects are not all that critical, and the profession marches on.

"At the same time, I am extremely open to some level of continuing education requirements for members of APG, and I look forward to discussing that topic with the rest of the APG board during my term."

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**John Philip
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Translates French and Italian

Degrees in medieval
French and Italian

Years of experience
in France and Italy

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How have you resolved the problem of pricing for your work? Many people want their family history researched, but many cannot afford average genealogists' rates. Do you have sliding scale fees? Friends and family rates? A flat per hour rate for everyone? Do you ever barter or trade services for genealogical research?

Autumn: "I believe I offer a reasonable rate. I do offer discounts when working with other genealogists and for those that express a hardship in paying my standard rate. I know how important genealogy is and treat each case as if it is my own family I'm researching. I like to keep my clients happy so I will work with them so we can get their goals accomplished."

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Claire: "I asked for help on pricing from several genealogists in Mississippi and surrounding states who perform client work. All were very gracious in sharing advice and rates. I do not have a standard sliding scale fee, per se. I have worked with some clients who requested a payment plan, but there is no reduction in the hourly rate. However, if it's a long-term or large project, I may reduce the hourly rate slightly, if asked. I also perform pro bono work depending on the person's circumstances and the project. I do have a *friends and colleagues* rate, which does not include family; we share information."

Diane: "Right now, my price structure is that I have a beginning retainer and then they can purchase hours after that. I run all my fees through PayPal which has worked out great. I am not sure that this is the best way in the long run, but it has worked out so far. I do some pro bono work for people that I know cannot afford my services. This depends on the person and how much time commitment is expected. I do put a limit on this. I usually guide them to doing the research themselves. If they learn specialized research skills then they can continue becoming lifelong learners. I really enjoy chasing the elusive family member. I have occasionally bartered for my services, as I have found that to be a win-win for both parties."

Paul: "Determining the monetary value of one's work is a key responsibility for any professional genealogist. Pricing is a challenge, but it is not a *problem*. Each genealogist must decide their rate by weighing their understanding of the market, their choice to operate on a full-time or part-time schedule, and their yearly income goals. Any discounts on services—sliding scales, friend rates, bartering—will necessarily reduce projected yearly income. As an employee of Ancestry.com, my rates are set by the company, and all of my time is billed at the same rate."

"Research is valuable, and all professionals should be compensated for their time and expertise. When I ask other professionals to help me with personal projects (beyond my client work), I pay their stated rate. The only research trades I accommodate are among close friends on a limited basis. I never expect a professional to sacrifice time and money for my projects. A small number of professionals have conducted extensive unpaid research with me, but their compensation is joining me as co-author on the resulting articles."

Ruy: "I price my services on an hourly basis, though I do not always find that approach particularly satisfying even as I see its frequent necessity. I do not offer any kind of special rates or trading of services, but I will often spend a couple of hours evaluating a given project's chance of success before agreeing to take it on. It sometimes takes little time to determine, for example, that the descent a client hopes for is not valid, and I see no benefit to compounding a client's disappointment with the added blow of unnecessary spending. This approach is not always possible, but if I can apply it, I will. I recall reading one time—in a book by Jacobus, perhaps—that 'it does not pay to be too grasping.' That strikes me as a reasonable principle."



Kyle Ingrid Johnson is a Boston-based writer and researcher with many years experience in nonprofit management and programming. She holds an MFA in Writing and a BU

Certificate in Genealogical Research and has special interest in old houses, lost people, and unconventional family histories.