

Synopsis of the first program presented by the APG Florida Chapter, central region.

More than a dozen chapter members attended a professional roundtable discussion on 5 February 2005 in Bartow, Florida, covering several topics from contracts to certification and accreditation.

Moderator Alvie Davison, CGRS, led the discussion. Jean Kelley, Central Florida program chair, arranged the meeting at the Polk County Historical and Genealogical Library. Joe Spann, library director, gave members a tour of the large facility and told about its holdings, one of the largest genealogical and historical collections in the Southeast. Its complete holdings are online at the Polk County Library Cooperative at <<http://www.pclc.lib.fl.us/>>.

The next program will be **April 23, 2005 (please note this is a date change)**.

The topic will be legal issues. Our speaker will be LeRoy H. Merkle, a practicing attorney in Tampa, with over 25 years experience.

The meeting location will be the Quintilla Geer Bruton Archives Center: A Genealogy and Family History Library 605 North Collins Street, Plant City, Florida 33563-3321

<http://www.rootsweb.com/~flqgbac/>

Sponsor will be the East Hillsborough Historical Society, who president, Shelby Bender, is an APG member.

The following are notes from the chapter discussion:

APG Florida Chapter, Central Region Program, Roundtable on Professional Issues

5 Feb 2005

Polk County Genealogical and Historical Library, 100 E. Main Street, Bartow, FL

At 9:50 am, before the official start of the program, Joe Spann Librarian for the Polk Co. Genealogical and Historical Library gave an introduction and conducted APG FL members on a tour of the facility.

At 10:30am the meeting opened with welcoming remarks by Jean Kelley, Program Chairman for the central region. Thanks were expressed to Joe Spann for allowing us to meet in this beautiful facility. Joe had also arranged for use of the conference room in the Museum for the APG Florida chapter board meeting at 9am. He graciously provided a continental breakfast for that meeting.

Jean introduced Dick Robinson, President of APG Florida chapter. He again welcomed everyone and thanked Joe Spann. Dick recognized the following members who hold office with the APG International group: Sharon Tate Moody, Vice President, Ann Staley, and Alvie Davidson, trustees. Dick reminded everyone to view the APG Florida website and the first issue of the chapter newsletter, The Sun. He thanked Brenda Simo for stepping in and publishing the excellent newsletter when Gail Ghinga-Hallas was unable to due to a family crisis. Dick reminded everyone it was time to renew their APG Florida chapter dues.

Jean introduced Alvie Davidson, CGRS as the program moderator for the topic of professional issues.

Below is a synopsis of what was discussed.

At 12:30 the group broke for lunch. The group of thirteen APG FLORIDA Chapter members plus guest Joe Spann and two family members met at Perkins for lunch together.

At 2pm the group reassembled, minus 3 members who had to leave, and discussion continued.

The program ended at 3pm.

Topics discussed with some notes on discussion.

1. **Contracts:** About a third of the group routinely use a contract of one to three pages. Some members use a letter of understanding or agreement. The phrase “interpreted under the laws of the state of Florida and the USA” is part of one contract so that if litigation was needed, it would have to be done in Florida courts. 2 members offered to share their contract versions with other APG Florida chapter members. Other areas of discussion were: different approaches to interviewing and prepare research plans for potential clients, what to do with files after end of career; copyright issues; research contracts vs. speakers’ contracts. Several times reference was made to *Professional Genealogy*, edited by E. S. Mills, and it was highly recommended as a source for professional issues. 2 APG members (Pamela Boyer Porter and Mary Douglass) have contracts on their websites and these were suggested for members to consider.
2. **Fees / Retainers:** Again, Pro Gen aka *Professional Genealogy*, edited by E. S. Mills was suggested as a source of good material. While rates do vary, but a large part of this discussion was on how to charge for the initial interview and pre research planning phase. Some researchers give a small amount of time initially, others seem to provide more. Also many have an issue with writing the research report and leaving enough paid time to do so. Most researchers charge retainers upfront on new clients, while not so with established clients. All researchers have been “burned” by a client. **The consensus was: “researching should not cost the professional money”.** Methods of dividing out travel and expenses among several clients were discussed. All members admitted to doing some form of pro bono work.
3. **Handling Difficult Clients:** One member’s comment was, “As the difficulty to deal with the client goes up, so does my rate”. Common problems shared by all: clients not providing all their prior information upfront/ being less than candid about what they want; most researchers avoid living person research. Consensus: if you have a bad vibe or can’t resolve the issue, walk away from the client.
4. **Office Arrangement:** One member to cut down on clutter have removed the tables from her work area; Technology update - if you haven’t moved your data off 5 ¼ floppy disks do so immediately, and consider going from 3 ½ disks to CDs soon; have backups stored offsite in safe place; consider 3 backups: in house, out of state, and out of country; internet backup was

suggested. Client financial files and the disposition of when done was discussed (this was a recent topic on the APG mailing list)

5. **Locating Clients:** how to advertise - write articles; volunteer; wear logo clothing (i.e. sweatshirt); simple, tasteful letterhead; research brochure - one member is considering; website; word of mouth of satisfied clients and research facilities; Who can use genealogist's services: banks and lawyers for heir search; government for MIAs; title companies. House histories for historical research. Lineage societies - one member present is working on his certification in this area. Cemeteries if need to relocate graves. Advertise in professional directories, Genealogical publications, USGENWEB county site as volunteer.
6. **Certification Vs Accreditation:** Attaining credentials can never hurt, and does help distinguish yourself; proves to peers you know your field; credentials has clout with other professionals (i.e. judges, lawyers); have BCG and ICAPGen behind you in dealing with problem clients (arbitration).