



Developing Your Skills through Continuing Education

By Angela Packer McGhie, CG, FUGA, and Jenifer Kahn Bakkala

As professional genealogists, we are continually learning and enhancing our knowledge. We may study a topic related to a client project or an area where we would like to develop expertise. We work to develop skills in research methodology, writing, and marketing our services.

APG members may be involved in the professional genealogy community in a variety of roles, and each role may present different educational needs. Researchers, writers, librarians, speakers, DNA experts, historians, heir searchers, bloggers, educators, lineage society experts, conference planners, translators, editors, archivists, publishers, project managers, photographers, and web designers are some of the ways that genealogical professionals describe themselves. Although our members have different educational needs, we all share a common goal: to develop our skills and move forward in our field.

The Continuing Education Requirement

APG committed itself to the importance of monitoring professional development in 2015, when it established a continuing education requirement of at least twelve hours per year for all members.¹ Since then, members have documented their educational experiences using a form on APG's website (apgen.org

[/cpages/continuing-education](http://apgen.org/cpages/continuing-education)), which asks for the number of hours completed as well as a brief description of the educational activities.

The process has benefits on both sides. For professionals, it serves as a reminder to keep track of educational activities, which in turn can be useful for resumes, business websites, and communications to potential clients or employers. For APG, the compendium of members' education descriptions can help shape programming and goals for the organization to better support its members by providing opportunities other educational institutions may be missing. In addition, it gives both the professional and APG a new level of standing and respect in the professional world.

This year, APG is asking members to submit their continuing education information for 2022 on or before 31 January 2023. This will help APG aid members in meeting the requirement on an annual basis and also will give APG's Professional Development Committee a comprehensive view of what members are seeking in terms of education for the future.

Although many APG members participate in far more than twelve hours of continuing education per year, twelve is all that is

¹ See the APG website page about continuing education at apgen.org/cpages/continuing-education.

currently required. The goal of twelve hours can be accomplished in a variety of ways, such as:

- attending the APG Professional Management Conference
- joining a monthly *NGSQ* study group to discuss articles with colleagues
- participating in a Small Business Administration course
- taking one course at a genealogy institute
- watching one webinar per month

As APG members select education options that fit their individual needs, they generally fall into three categories: research skills, writing skills, and business skills.

Research Skills

Many APG members conduct genealogical research for private clients or work for a company that provides research services. Developing research skills includes learning how to locate and use a wide variety of documents, how to analyze the documents for information relevant to the research question, and how to access records that have not been digitized. Members may take a course in genealogical records to fill in the gaps in their experience and learn about records they have not had a chance to use yet. They may dive deep into learning the records and customs of a certain ethnic population or geographic location where they would like to specialize. They may choose an intermediate or advanced methodology course to master the skills necessary to solve tough research problems.

Writing Skills

Regardless of the area of specialty, APG members need to be able to communicate their research results in writing. For many, this means developing skills in writing research reports. For others, it may be writing forensic affidavits, explaining the results of a DNA study, or compiling a house history. Members also write blog posts to share family information or their knowledge about a particular topic, articles or case studies in genealogy journals, biographical sketches of their ancestors, or books about their family history or for clients.

General writing courses are available at local colleges or online, and specialized writing courses for genealogists are available at the genealogy institutes (GRIP, IGHR, and SLIG).² For those who prefer self-study options, there are seven chapters about genealogical writing, editing, and publishing in *Professional Genealogy: Preparation, Practice & Standards*, edited by Elizabeth Shown Mills.³

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Business Skills

Many APG members are self-employed and need to develop business skills to be successful. Some members come from other fields where they have developed these skills, and others learn through managing the many facets of their business. The areas where many need to develop business skills include accounting, budget management, business planning, effective communication, marketing, sales tracking, and time management. Some genealogists choose to participate in a ProGen Study Group (progenstudygroups.com), where professional and aspiring genealogists study *Professional Genealogy: Preparation, Practice, & Standards*. These members complete practical assignments each month and then provide feedback to group members about their business plans, contracts, and marketing plans.

Ideas for Continuing Education Options

For those who feel motivated to dive in and study one of the topics above, below are a few ideas to consider adding to your personal education plan. Options range from resources provided with your APG membership to certificate or degree programs, genealogy institute courses, online resources, and self-study books and articles. Investing time in developing your skills will benefit your career and prospects in the industry.

You may wish to conduct an educational assessment. Think about what you need to learn to make progress towards your professional goals. List topics that are of interest to you or areas where you need to develop skills (research, writing, or business). Create an education plan to meet your goals. Consider the following options and your budget, time frame, and needs.

APG Recorded Webinars

As a benefit of membership, APG provides a variety of live and recorded webinars. To access the recorded webinars, log in to the APG website (apgen.org), go to **Membership Resources**, and then go to **Webinars**. There are eighty-six webinars in the library, which are organized into these categories:

² Genealogy Research Institute of Pittsburgh, Institute of Genealogy and Historical Research, and Salt Lake Institute of Genealogy.

³ Elizabeth Shown Mills, ed., *Professional Genealogy: Preparation, Practice & Standards* (Baltimore, MD: Genealogical Publishing Company, 2017).

- Business Management
- Client Management
- DNA
- Education
- Genealogical Careers
- Legal and Ethical Considerations
- Marketing
- Organization/Time Management
- Repositories
- Research Tools and Methodologies
- Speaking/Teaching
- Writing

APG Professional Management Conference

The APG Professional Management Conference (PMC) is held annually in the fall and features presentations and workshops designed for professional genealogists. This year the conference will be held virtually from 21 to 24 September 2022. The theme is *How to Pivot: Genealogy in a Changing World*. It will feature twenty presentations from professionals in the field as well as three workshops. For those unable to attend the conference live, there is an option to purchase a package of the recordings with access until April 2023. See the program details at apgen.org/cpages/2022-professional-management-conference.

Reading APGQ, NGSQ, and Other Journals

The *APG Quarterly* publishes articles of unique interest to professional genealogists about a wide variety of topics. Members can access it when they are logged on to the APG website by clicking on **Publications**. There is an archive of the PDF versions of the *APG Quarterly* from 2004 through the current issue and an index by topic.

Reading case studies in scholarly journals can help the reader learn about the sources, methodology, and strategies for solving similar genealogical research. There are many respected US state journals in addition to the following peer-reviewed journals:

- *The American Genealogist* americangenealogist.com
- *National Genealogical Society Quarterly* ngsgenealogy.org/ngsq
- *The New England Historical and Genealogical Register* americanancestors.org/publications/register
- *The New York Genealogical & Biographical Record* newyorkfamilyhistory.org/resources/periodicals/read-online

If you would prefer to study the journal articles with a group of colleagues, consider joining an *NGSQ* study group for free at ngsqstudygroup.com.

Genealogical Institute Courses

There are several week-long genealogy institutes that provide in-depth education about a variety of topics in genealogy. Many of these are advanced programs that offer courses such as advanced methodology, documentation, writing, report writing, genealogical records, and regional or ethnic topics. These institutes began with in-person courses and are currently offering virtual courses. Check the websites for courses, dates, and registration information.

- British Institute isbgfh.com
- Genealogical Institute on Federal Records gen-fed.org
- Genealogical Research Institute of Pittsburgh gripitt.org
- Institute on Genealogy and Historical Research ighr.gagensociety.org
- Midwest African American Genealogy Institute maagiinstitute.org
- Salt Lake Institute of Genealogy slig.ugagenealogy.org/cpage.php?pt=524
- Texas Institute of Genealogical Research txsgs.org/texas-research-institute

Attending a Genealogy Conference (In Person or Virtually)

Genealogy conferences provide educational presentations about a wide range of topics. The most recent National Genealogical Society conference featured sessions about researching various ethnic communities. Some national and regional conferences are highlighted below, but now that many conferences are conducted virtually, genealogists can participate from anywhere in the world.

- **AFFHO Australasian Family History Congress**—Norfolk Island, Australia affhocongress2022.com
- **Family History Down Under**—Castle Hills, New South Wales, Australia fhdu22.com
- **International Congress of Genealogical and Heraldic Sciences**—Cambridge, England congresscambridge2022.com
- **National Genealogical Society Conference**—annually in May ngsgenealogy.org/conferences
- **New England Regional Genealogy Consortium**—biennially, 2023 in Springfield, Massachusetts nergc.org/2023-conference
- **Ohio Genealogical Society Conference**—annual conference in April ogs.org
- **Ontario Ancestors Conference**—Ontario, Canada (virtual) conference2022.ogs.on.ca
- **RootsTech**—annual conference sponsored by FamilySearch in Salt Lake City and online www.familysearch.org/rootstech/home

- **Southern California Genealogical Society Jamboree**—annual conference genealogyjamboree.com

See the Conference Keeper list of conferences for dozens of events around the United States and the world at conferencekeeper.org/conferences.

Webinars and Online Education

There are countless options for online education now that many societies and organizations are offering their programming virtually. This is a unique opportunity to learn about topics that were difficult to access when you had to be there in person to participate. Webinars, online classes, and workshops are offered widely. See the Conference Keeper listings for Online Events at conferencekeeper.org/virtual.

Two new options for online education are the following:

- Applied Genealogy Institute—appliedgen.institute
- Family History Academy—familyhistoryacademy.com.au

One economical option is Legacy Tree Webinars (familytreewebinars.com), with an annual membership of only \$49. This website has more than 1,700 recorded webinars available to view anytime from anywhere. APG members may be most interested in advanced topics in the following categories:

- **Board for Certification of Genealogists** (110 webinars) familytreewebinars.com/webinar-library/?category=visit-www-bcgcertification-org
- **Methodology and Skills** (259 webinars) familytreewebinars.com/webinar-library/?category=methodology
- **Writing and Publishing** (34 webinars) familytreewebinars.com/webinar-library/?category=writing1

Small Business Courses

Continuing education doesn't have to be offered by a genealogical organization. For instance, there are a variety of courses available that are designed to help small business owners. These may be offered through the US Small Business Association, a state small business development center, a community college, or an international organization. Here are a few to consider:

- **SCORE**—Free advice from business experts score.org
- **Small Business Association** <https://learn.sba.gov/dashboard>
- **Small Business Development Centers** sba.gov/local-assistance/resource-partners/small-business-development-centers-sbdc
- **Veteran's Business Outreach Center** sba.gov/local-assistance/resource-partners

[/veterans-business-outreach-center-vboc-program](http://veterans-business-outreach-center-vboc-program)

- **Women's Business Centers** sba.gov/local-assistance/resource-partners/womens-business-centers

There are also online courses in business and marketing topics from a variety of educational providers. Some of these may be available through a public library with remote access. Here are some examples for courses on marketing, but the same organizations provide courses on other business topics as well.

- Coursera coursera.org/courses?query=small%20business
- LinkedIn linkedin.com/learning/small-business-marketing
- Skillshare skillshare.com/browse/small-business-marketing
- Udemy udemy.com/course/smart-marketing-for-small-business-owners

With so many options available, it is not difficult to meet—or exceed—APG's twelve-hour continuing education requirement. Continued learning has the potential to provide great rewards for genealogical professionals and the people and institutions that they serve. An added benefit of participating in educational programs is networking with other genealogists and developing relationships with colleagues. Consider adding some of the options above to your personal education plan as you move forward with your professional career.



Angela Packer McGhie, CG, FUGA, has a passion for teaching genealogy. She is the education director for the National Genealogical Society and a trustee for the Board for Certification of Genealogists. Angela enjoys teaching at national genealogy conferences and institutes. She was the first administrator of the ProGen Study Program and is now on the board of directors. She has served as an APG chapter president and currently serves on APG's Professional Development Committee.



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