



# One-on-One Education Mentoring

by Katharine O'Connell

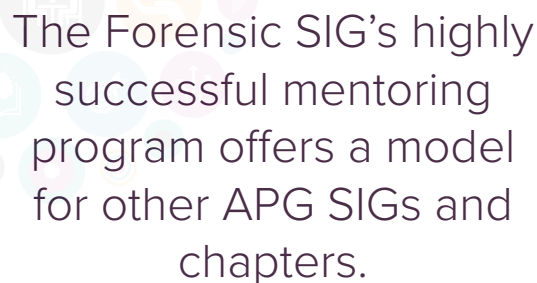
**B**eing a genealogist means continual education to keep your skills sharp and your knowledge current. There are so many things to learn and so many questions to ask. Institute classes and webinars help, but there's a knowledge gap and you don't know where to turn. Your genealogy buddies are terrific but are at the same point in their own careers and need help too. You need practical advice about the field and someone more experienced to talk to, a teacher to work with one-on-one. Someone to ask all your questions of and debrief with after you've tried something new. You need a mentor!

Now imagine yourself in five to ten years. Confident, secure in your knowledge, but wanting to branch out into a new area. You

want to learn more about DNA research or early New England research, or you have a case in another country and don't know where to start. Your genealogy buddies are all in your specialty; you'll need to reach out to someone new. You need a mentor!

Having a mentor is the perfect solution when you find yourself with a specific knowledge gap and know just what questions you need to have answered. A mentor can help you find your footing, help you develop in a new direction, and give you key information about finding your way as a professional.

Forensic genealogists (who do family research for military repatriation, criminal investigations, estates, mineral rights, and real estate cases) especially need mentors as they learn the



Gaining practical experience in such high-stakes settings can be difficult for newcomers to the forensic genealogy specialty, and there is much that cannot be learned during a one-week institute or an informational webinar. While monthly panel discussions and lectures help members of the APG Forensic Special Interest Group (SIG) stay current on many topics, the Forensic SIG's leadership designed a mentoring program to develop the careers of emerging forensic genealogists.

One of the hardest parts about starting out as a new professional in the business is that our work so often has us working in a vacuum. Even if our clients are happy with our work, we often only ever see our own work and get feedback from clients—who are not genealogy experts. This can prevent us from growing and improving. Having a mentor to help give an outside and professional perspective definitely helps.

The Forensic SIG mentorship program began soon after the SIG was formed. The first pairs were matched in January 2021, and the first cohort was completed in April 2021. Since then, more than fifty-eight pairs have worked together, a good portion of the SIG's 222 members.

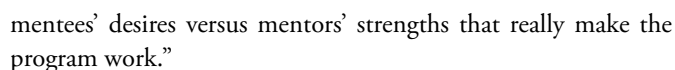
The refinement of the SIG's mentoring program over two years created a sturdy template for other APG SIGs and chapters. This article will detail how the mentoring program works.

Following is an overview of how the Forensic SIG's mentoring program functions.

The board created a mentoring committee rather than relying on one person to run the program. Mentoring Committee member Jenny Rizzo Irwin said there is “value in having input from SIG members who bring different perspectives, experiences, and expertise in the different specialty areas of forensic genealogy.” Michael Ramage, the SIG’s current president, said there is a practical advantage to having a committee: “It is too big a job for one person to run given the size of our SIG.” The committee splits the tasks of sending out and reviewing intake forms, matching pairs, and answering questions. The SIG asks that mentees pay a small fee (\$25), which helps offset coordination costs and helps create an increased sense of commitment on the part of participants.

The matching process begins with an intake form, which asks mentees about their level of experience, what area they want to work in (estates, DNA, military repatriation), and what skills they hope to work on (business plans, research skills, etc.). A similar form asks mentors about their skill sets. The questions on the form have been refined over time to help mentees realistically assess their level of experience (the words beginner, intermediate, and professional were confusing, so the form now asks how many hours of casework experience mentees have). A revised version of the form now asks specific questions about what mentees want to get out of the experience and encourages the mentee to have a specific plan in mind. A good intake process ensures the best match between mentor and mentee. Ramage credits Leslie Lawson, current Mentoring Committee chair, with a useful innovation: “She did a terrific job creating spreadsheets that list





Skill sets mentors can share vary widely across the SIG. For example, some mentees may want advice on marketing or small business skills. As Laurie Hermance-Moore noted, “I have deep expertise in strategy and marketing and appreciate the SIG allowing me to choose this focus. My current mentee has a unique niche for her business that I am helping her position in the market.”

Other mentees might want to gain research experience in the specialty. In that case, they might be matched with Claire Ammon, a mentor in the missing heir and military repatriation specialties. Ammon said, “I’m a strong proponent of learning by doing, so I give my mentees a sample case to work on. I am then available to answer questions and critique their work.”

After going through the intake process, matches are made and notified. If there are more mentees than available mentors, those not given a pairing are given priority during the next cohort.

## Limited Scope, Time, and Flexibility are Key

There are two cohorts a year, one in the fall and one in the spring. The committee started with three a year, but that was too many. Mentors have busy careers. Many run their own businesses; some teach in summer and winter institutes. After the first year, the committee decided that not running a cohort during the holidays and the summer would help prevent mentor burnout. The groups now meet from September through November and February through April.

Once a cohort is formed, mentoring pairs work together for three months, with the goal for a minimum of three meetings/conversations during that time. Since most pairs are not close geographically, they can talk by phone, use email, or meet virtually. Committee member Irwin suggested that other APG chapters and SIGs maintain a similar flexibility:

When developing a mentoring program, it's important to be flexible enough to allow participants to meet on their own schedules and make any necessary adjustments in terms of timing and scope of information covered. It is equally important to provide structured guidelines to help set expectations and share best practices.

The limited scope of the project gives pairs a chance to work together. If the pair is a good fit and the mentor agrees, mentees can continue reaching out as they encounter questions in their casework or business plan. Neumann has maintained contact with her mentor over time:

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[My mentor] has continued to act as a sounding board when I work through a challenging case and is always willing to offer helpful suggestions and advice. She is an experienced voice when I encounter a new type of problem or situation that I haven't dealt with before. It is also nice to be able to commiserate trials and celebrate wins with someone in the business who fully understands what you went through.

## Communication is Vital

Irwin emphasized that once pairs meet, they work together to fine-tune goals:

It's important for both mentor and mentee to be open-minded and treat the relationship as an opportunity to share and learn from each other. As with any relationship, honest communication and a discussion of expectations will help make sure both parties have an enjoyable and productive experience.

Though this happens rarely, if a match isn't working out, either party can reach out to the Mentoring Committee for advice. The committee has worked with pairs to clarify goals and get them back on track or made reassignments for a better fit.

## Assess Outcomes

An outreach form at the end of the cohort helps the Mentoring Committee determine what is working with the program and whether any changes need to be made. After some mentors reported that mentees started the relationship with no goals to work toward, the committee created guidelines that encouraged mentees to come to meetings prepared and ready to work. The committee also held a meeting this fall to educate SIG members about the program. Having an opportunity to ask questions helped attendees know how much experience they needed before becoming a mentee, and mentors had a chance to learn how their peers structured their time with their mentees.



Mentees considering applying for the mentoring program will have a higher chance of attaining their goals if they put in some work ahead of time.

Vicky Lambert, who helped design the mentoring program for the SIG and is a member of the SIG's Mentoring Committee, said it's important to ask "where am I and how do I get to where I want to be? You need enough training to know what you don't know." After that self-assessment is done, Lambert recommended that mentees "make an education plan and figure out what gaps they have. A mentor should be there to fill in blanks that normal education doesn't provide."

**2. Find out whether this is the career for you.** Mentee Georgia Daleure said:

better understand what is involved in making this my career. I'm proceeding with my career moves, which are planned over five years.

**3. Come prepared.** Lambert and the rest of the committee emphasized that the mentoring partnership is not a passive one. The mentor has a lot of knowledge to offer but limited time. Lambert said that as a mentee, it was important to be clear about what she wanted to know, take notes, and ask questions. While working on the skills her mentor taught her, Lambert wrote down more questions so if something didn't work out, she could ask her mentor about it later. Lambert pointed out that "the relationship is owned by the mentee. They set the agenda and ask the questions."

Before jumping in to help, mentors will want to consider their time, boundaries, and the resources they can share with mentees.

Lawson said if she encounters a mentee who has not prepared for a meeting, she cancels the meeting and asks them to reschedule when they have an agenda created that includes specific skills to work on. She asks for the agenda twenty-four hours in advance

so she can be prepared to answer questions. If Lawson doesn't receive the agenda in time, she cancels the appointment. This structure protects her time and gives the mentee an opportunity to be specific about what they want to learn.

Lambert said, "It's not up to the mentor to do all the heavy lifting." She also pointed out that mentees need to realize, "this time with your mentor is a gift. Be prepared!"

**2. Be a career advocate.** Developing a career is more than solving cases so looking at the broader picture is also important. Mentors might think about ways to help their mentees meet other people in the field. Outside of the specific plan for the three months, a mentor might ask:


- How can I help my mentee get their name known?
- What groups could my mentee join to advance their knowledge and client base?
- Are there speaking opportunities or projects I know about that might give my mentee experience or build skills?

Mentors are in a great position to connect their mentees to people who might help them as they develop a professional presence.

**3. Skill building and workflow.** Oftentimes, forensic cases are time-sensitive, move quickly, and involve deadlines. Letting a mentee know a mentor's process and workflow can be eye-opening and expose them to the reality of casework. If a mentee works on a practice case, consider having them give a mock presentation of their findings with the mentor in the role of the client.

**4. Mentors can learn from mentees.** Genealogy is often a second career. Mentees bring expertise in other fields that can contribute to the relationship as well as the SIG. For example, Lambert worked in mentoring in her previous work life at Intel. Lawson, her mentor, credited that expertise with providing a template for the Forensic SIG's mentoring program, "Lambert used those skills [from Intel] to create a process for us to use in our group now."

Mentee Shawna Sherrell has marketing and social media experience from her previous job in communications. She hopes to develop her knowledge in those crucial areas into a lecture for SIG members even as she works on her forensic skills as a mentee. Mentor Hermance-Moore stated that every SIG member needs to understand marketing: "No matter the industry, no one loves marketing or putting themselves out there, but you can't expect to grow without it." The same could be said for the mentoring process!



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Lambert said we all have something to learn: "Show me someone who doesn't have an educational gap and I'll show you someone who isn't alive. The one-on-one nature of mentoring gives pairs a chance to learn from each other."

## Next Steps

Mentee Kathleen Carter said: "This program is a win-win for both mentors and mentees. It helps those interested in forensic genealogy gain experience, find the right fit for their skills and talents, and explore the many opportunities this growing [specialty] provides."

Consider adding the Forensic SIG's mentoring model to your area of interest. With so many well-trained genealogists in APG, members have a lot to offer and can help the next generation achieve their professional goals. The result will be a stronger, better-connected future for all of us.



*An experienced forensic genealogist, Katharine O'Connell assists attorneys and major banks in locating missing and unknown heirs. She has provided due diligence research in more than 175 probate and title cases in locations throughout the United States and Canada. Clients include attorneys throughout the US and internationally, and the trust departments of Key Bank and PNC Bank. She regularly does pro bono research for the Legal Aid Society of Cleveland.*