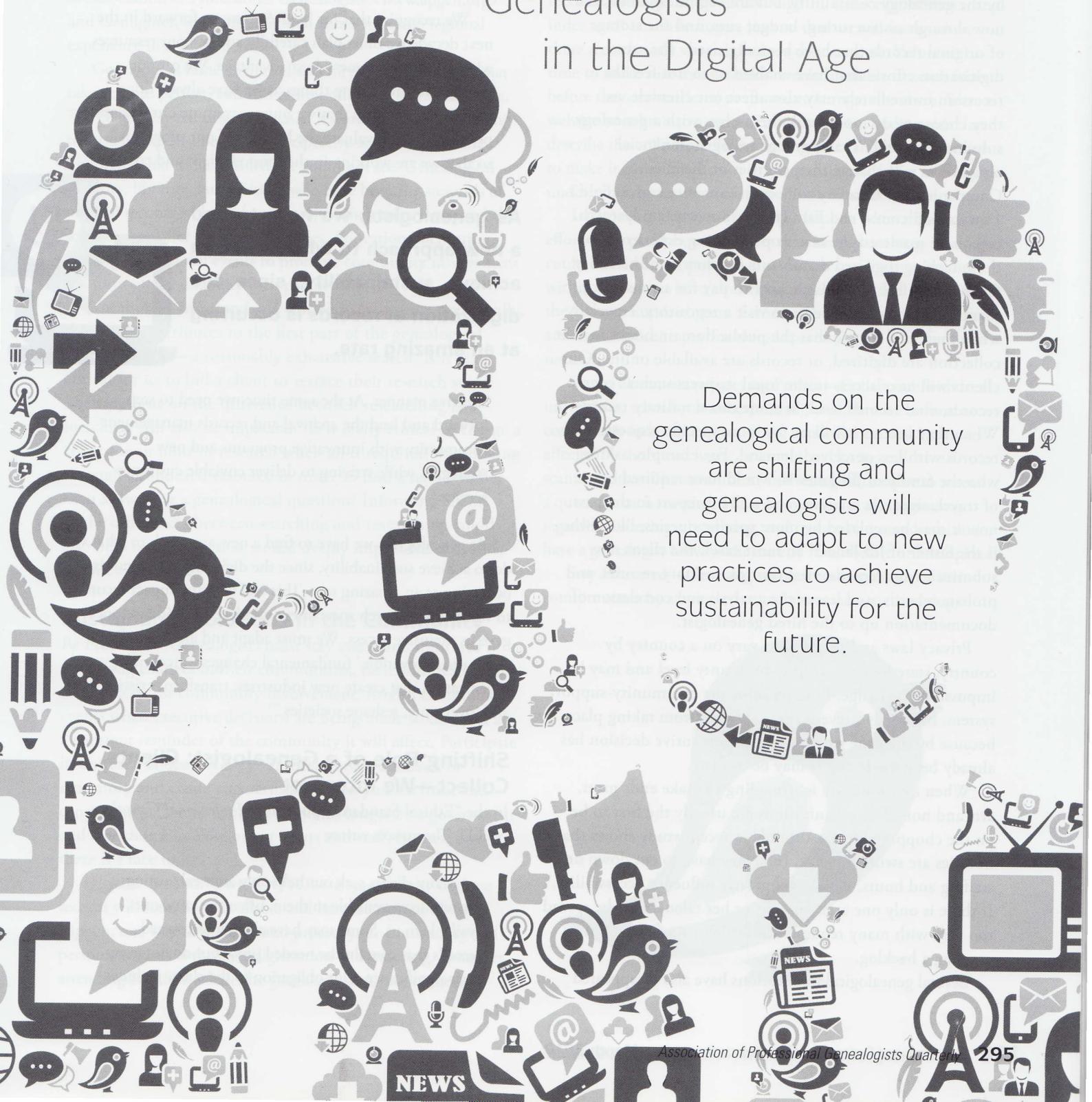


# Achieving Sustainability

Genealogists  
in the Digital Age



Demands on the genealogical community are shifting and genealogists will need to adapt to new practices to achieve sustainability for the future.

Original records are disappearing and going into storage. Privacy laws and restrictions, low-quality digitized copies, budget cuts that lead to fewer employees and hours—these are just a few of the challenges that genealogists presently face and will continue to face in the future. Keeping records open, available, and accessible, along with continued education will greatly impact the role of the genealogist.

## The Current Environment

Many effects of the recession were not immediately felt by the genealogy community, but are beginning to kick in now through restructuring, budget cuts, and the storage of original records that have been digitized. The same digitization efforts that have enabled us to not feel the recession immediately may also affect our clientele, as they choose to do more work themselves with a genealogy subscription rather than pay a genealogist. Financial obligations will change the priorities of the client.

Companies like Ancestry.com <[www.ancestry.com](http://www.ancestry.com)>, Fold3 <[www.fold3.com](http://www.fold3.com)>, and FamilySearch <[www.familysearch.org](http://www.familysearch.org)> have mastered the one-stop shopping experience for those seeking digitized documents for their family history. Clients may feel that it is cheaper to pay for a subscription than to fly to the East Coast to visit a repository, especially when there is a chance that the public domain books in that collection are digitized, or records are available online. Our clients will have access to the usual suspects such as census records, vital records, and, in some cases, military records. When they hire us it will be for more specific requests and records with less perceived demand. For example, asking who the family of Jill Janes is, would have required hours of travel, research, analysis, and a client report in the past, now it may be replaced by more specific queries, like, “who is the father of Jill Janes?” In most cases, the client now submits census records, vital records, military records, and probate records, and leaves the analysis and correlation of documentation up to the hired genealogist.

Privacy laws and restrictions vary on a country by country, state by state, county by county level and may be impossible to change. Protests show the community-support system, but rarely prevent these changes from taking place, because by the time we find out, the executive decision has already been made and it may be too late.

When a community is struggling to make ends meet, arts and non-civic organizations are usually the first to be on the chopping block. Although a recent study shows that libraries are swinging back, they may have to cut down on staffing and hours, which will greatly influence accessibility.<sup>1</sup> If there is only one archivist, his or her talents may be spread too thin with many requests and little or no funding, thus creating a backlog.

Several genealogical publications have also disappeared

from newsstands due to low numbers of subscribers. These outlets used to be the primary way we received updates on news, technology, education, case studies, and community profiles. The shift from printed word to digitized editions was quick but set a tone: the Internet has made us impatient and now we can receive updates hourly if we want rather than wait for it four times a year.

Financial obligations will also change the priorities of the repositories. The revised 2009 Strategic plan of the National Archives states the following:

We recognize that for NARA to move forward in the next decade we must plan carefully and use our resources wisely to our customers' best advantage. We cannot simply continue doing things as we have always done them. We recognize that we must reexamine our business processes and reevaluate the benefits of our programs so that we are working in the most efficient and cost

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effective manner. At the same time, we need to step forward and lead the archival and records management community with innovative programs and new strategies, while striving to deliver enviable customer service.<sup>2</sup>

As genealogists, we have to find a new approach to what we do to achieve sustainability, since the digitization of records is occurring at an amazing rate. This will directly impact records to which our research specialties and place of residence once gave us exclusive access. We must adapt and alert our clients to “basic innovation,” fundamental changes in technology and organization that create new industries, transform existing ones, and, over time, reshape societies.<sup>3</sup>

## Shifting Role of a Genealogist: Clients Collect—We Interpret

In the “Ethical Standards” portion of *Professional Genealogy*, Neil D. Thompson writes:

Many clients seek our help only after exhausting the resources available to them, often the same ones available to us. Some may have already discovered records that contain the needed proof but do not grasp their significance. Our obligation to the client includes

designing and carrying out an efficient and intelligent research plan based on the data they have collected already.<sup>4</sup>

Demands for genealogical research will shift gears to become more customer service driven. Online databases already have that instant access appeal, but an abundance of documentation will still need to be analyzed by a trained eye. As mentioned before, clients will come to us with more specific questions rather than vague ones, and our regional or research focus may be of less assistance. We can now direct them to websites such as Association of Professional Genealogists <[www.apgen.org](http://www.apgen.org)> and Genlighten <<http://genlighten.com>> for more regional experience in a wider network.

Genealogists hone analytical and methodological skills that take years to perfect, and this creates our most sustainable role. The client may cut down on actual research time by exhausting the usual suspects, but a new perspective and viewpoint may find items that the untrained eye could not see. Genealogical societies, libraries, and archives who have been the stewards of original records will also have to adjust their roles to expand the services they offer their communities. Education, mentoring, and organizing local events to promote community involvement is a form of sustainability with partnership.

Vocabulary and standards will be revised since, technically, the client contributes to the first part of the genealogical proof standard—a reasonably exhaustive search. Is it really ethical for us to bill a client to retrace their research steps? The emphasis on the difference between researching and searching will also be impacted.<sup>5</sup> Is it really ethical to charge a client for an hour of research when all it required was looking through an indexed resource in order to find a name, rather than answering a genealogical question? Informing clients of the differences between searching and researching could also help build trust that would deeply impact the customer-service experience.

## Sustainable Solutions in the Community

**Be Proactive**—Genealogists must stay aware and informed of upcoming changes in their communities, be it with RSS feeds, e-mail alerts, or community involvement. Attend community events when executive decisions are being made so that you are a constant reminder of the community it will affect. Participate in outreach endeavors for your local library, archives, or repository and create partnerships. When you are front and center, the person of contact, it will no longer be a government and city choice to close or cut hours and staff, because now there is a face to it.

**Digitize On Your Own (DOYO)**—Because many of these records will soon be unavailable and because natural disasters happen, one way to preserve and protect your community and personal records is through digitization and indexing. Consider attending Scanfest, where the genealogy community meets

online to chat while scanning.<sup>6</sup> Make sure you back up your digitized items in several formats so that they are safe. Several storage sites offer a few free gigabytes, such as Dropbox <[www.dropbox.com](http://www.dropbox.com)> and Amazon's Cloud Drive <[www.amazon.com](http://www.amazon.com)>.<sup>7</sup>

**Volunteer and Share**—Volunteer at local libraries, archives, and repositories where budget cuts may affect accessibility. When we do find out about planned changes in restrictions and laws, there is a time frame for implementation. It is in this window that we must be proactive and do what we can to make these records accessible in the future: digitize, transcribe, abstract, and index until our little fingers hurt so that we will know where these records once were and where they are now. Volunteer time to make sure these records remain available in some form, before they are restricted or moved to storage elsewhere. Start a website or submit to a current one and create finding aids that describe the collection. These finding aids can be placed online to make it easier for patrons to request specific items or to better understand the contents of the collection itself.<sup>8</sup>

Low-quality copies are bound to happen when digitization efforts take place, but it is better than having nothing. The same could be said about poor-quality abstracts and transcriptions within books that have already been published and used over the last one hundred years. Errors are bound to occur, but they are a small price to pay for records pertaining to your family or research.

**Start a Community Indexing Project**—Collaborate with local universities, schools, churches, and regional libraries to form a community indexing project where you will meet at a location affected by shortened hours or imminent closure and have a scanning drive. The community can set a goal or strive to meet a quota for each meeting. Have an overview at the beginning regarding indexing, abstracting, and transcribing standards, and have a genealogist heavily edit the end result before online upload.

**Stay Educated**—Genealogists need to branch out of their comfort zones by staying educated about new methodology



and technology, and should feel responsible for informing societies of these also. Several organizations, such as the National Genealogical Society or Federation of Genealogical Societies, and well as institutes, such as the National Institute on Genealogical Research and the Samford Institute of Genealogy and Historical Research, often rotate new courses on these subjects. If you are unable to make it in person, JAMB Tapes, <<http://jamb-Inc.com>> has several of these conference presentations in CD format that can be purchased and listened to on your own timeline. Genealogy podcasts such as the Genealogy Guys, Genealogy Gems, and African Roots Podcasts (to name a few) are available on iTunes <[www.apple.com/itunes](http://www.apple.com/itunes)>. Learn and study methodology by joining the NGSQ Study Group or think of committing nineteen months to a ProGen Study Group <<http://progenstudy.org>>. There are several online educational webinars to watch and add, to expand on your ever-growing knowledge.<sup>9</sup>

Mentor the Next Generation—Cross-generational collaboration will enhance the educational experience and teach the next generation what cannot be found in a book. With indexing, abstracting, and transcribing of records, the next generation of genealogists will have an abundance of derivative sources that may be stored offsite while digitized images of the originals will remain categorized as original sources. Genealogists with regional and time-period specialties should consider mentoring the next generation of genealogists, as they have years of regional expertise to share. Teach them how to get involved in education and develop healthy habits. For example, having *Evidence Explained* open while adding citations, or familiarizing themselves with different types of records or flash cards for learning fundamental vocabulary. The power of mentoring can never be underestimated.

Collaborate—Although the analytical aspect of genealogy is solitary, there is a whole community out there to collaborate with. Websites like the wiki-driven WeRelate <[www.werelate.org](http://www.werelate.org)> allows you to interact with family in a different format, as does Twitter <[www.twitter.com](http://www.twitter.com)>. Going outside our comfort zones to read and see case studies in different formats, such as blogs, will help to keep us on the leading edge of larger genealogy trends. Will a Twitter feed someday solve a genealogical question? The future of genealogy has endless opportunities for growth.

## Embrace the Changes

We must be willing to put our self-interest aside and embrace the changes taking place now so that the next generation of genealogists will have tools that provide them with capacity to endure. Initiatives, reasonable goals that engage the genealogical community, and investing in the future will all make a bright tomorrow attainable. Sustainability can be achieved with cross-generational collaboration, flexibility, healthy habits, non-stop education, and by just doing the work.

## Notes

1 Karen Muller. "How Many Closings?" Ask the ALA Librarian 15 June 2010, accessed 28 March 2011, <<http://americanlibrariesmagazine.org/ask-ala-librarian/how-many-closings>>.

2 *Preserving the Past to Protect the Future: The Strategic Plan of the National Archives and Records Administration 2006-2016*, accessed 28 March 2011, p.2, <[www.archives.gov/about/plans-reports/strategic-plan/2009/nara-strategic-plan-2006-2016-final.pdf](http://www.archives.gov/about/plans-reports/strategic-plan/2009/nara-strategic-plan-2006-2016-final.pdf)>.

3 Peter Senge, *The Necessary Revolution: Working Together to Create a Sustainable World*. (New York: Broadway Books, 2010), 57.

4 Elizabeth Shown Mills, editor, *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians* (Baltimore: Genealogical Publishing Company, 2001), 91.

5 Marsha Hoffman Rising, *The Family Tree Problem Solver: Proven Methods for Scaling the Inevitable Brick Wall* (Cincinnati: Family Tree Books, 2005), 7-8.

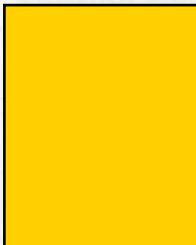
6 Miriam, 27 March 2011 (11:00 a.m.), "Welcome to Scanfest!," *AnceStories: The Stories of my Ancestors*, <<http://ancestories1.blogspot.com/search/label/Scifest>>.

7 Thomas Macentee, "Dropbox for Genealogist with Thomas MacEntee," accessed 28 March 2011, <<http://blog.geneawebinars.com>>.

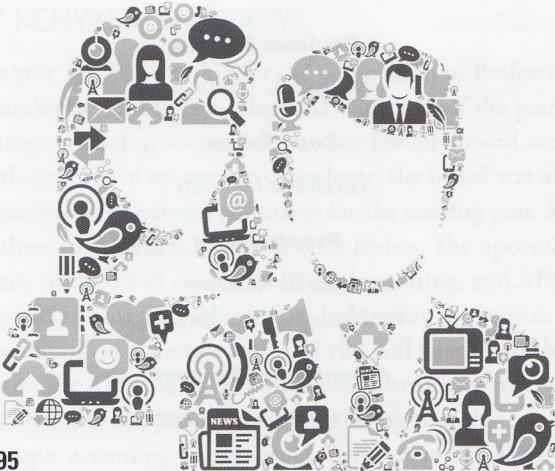
8 One example of such a finding aid is at the Western Kentucky University *TopSCHOLAR* website where there are PDF finding aids of manuscript collections: <[http://digitalcommons.wku.edu/dlsc\\_mss\\_fin\\_aid](http://digitalcommons.wku.edu/dlsc_mss_fin_aid)>.

9 Just to name a few education webinars:

- GeneWebinars <<http://blog.geneawebinars.com>>
- Ancestry.com Webinars <<http://learn.ancestry.com/LearnMore/Webinars.aspx>>
- Roots Television <[www.rootstelevision.com/program\\_guide.php](http://www.rootstelevision.com/program_guide.php)>
- FamilySearch <<https://familysearch.org/learn/researchcourses>>
- New England Historic Genealogical Society <<http://americanancestors.org/online-seminars>>



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