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Cover Story:

How Do I Keep My Hats Straight?

And Other Pithy Questions Raised by Professional Genealogists

by Elizabeth Shown Mills, CG, CGL, FASG

Also In This Issue:

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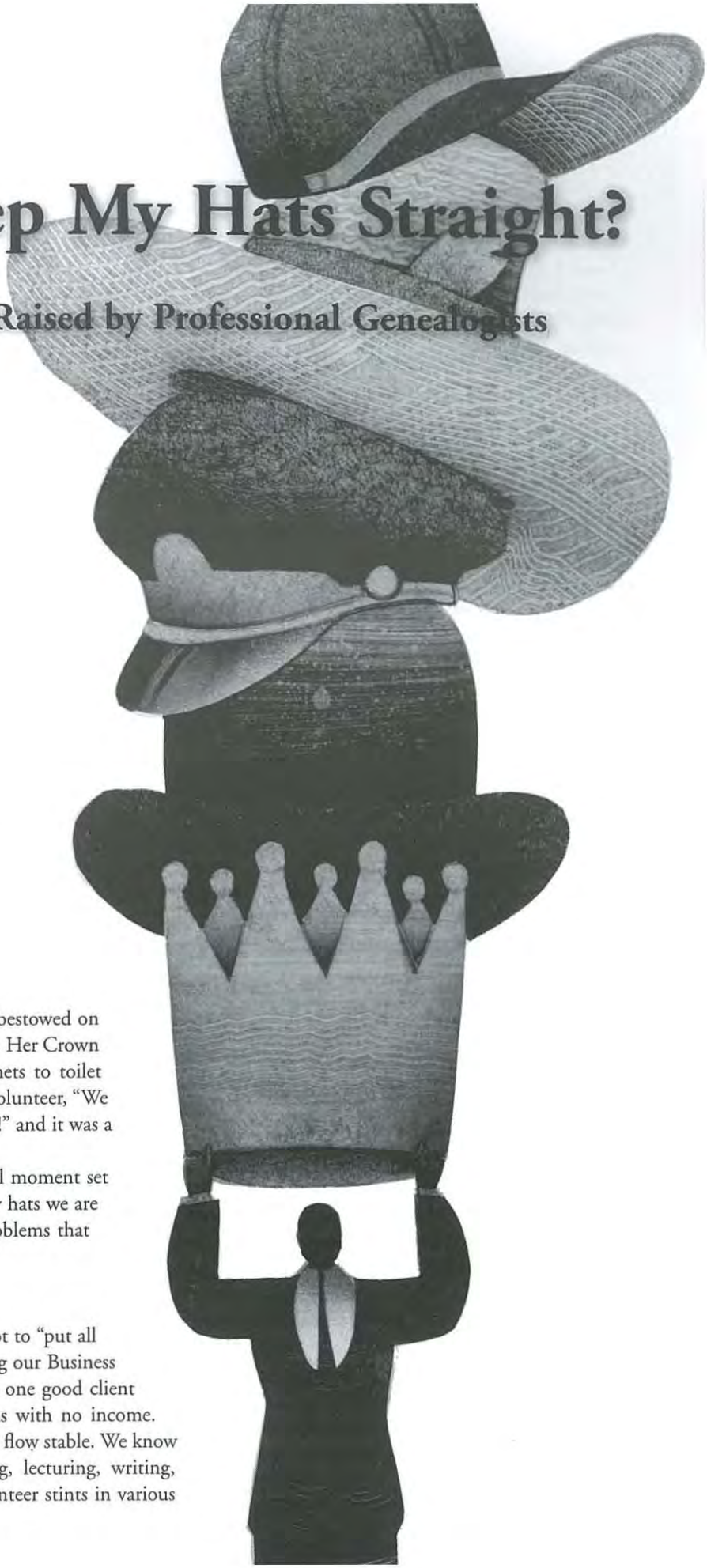

As one who has worn many hats in genealogy, Mills explored some sticky issues in a recent luncheon address to the Board for Certification of Genealogists. Here, as there, she poses questions for debate, personally and within our organizations.

At a recent conference, the Many Hats Award was bestowed on one of our colleagues, and the ceremony was a riot. Her Crown of Achievement included everything from crash helmets to toilet seats. It was a fun moment that said to this wonderful volunteer, "We love you! We appreciate you! We can't live without you!" and it was a well-deserved honor.

On my flight home, the memory of that delightful moment set me to thinking about a less-charming side of the many hats we are all encouraged to wear as genealogists, specifically, problems that stem from the pressure of those hats.

Crowded Pates and Plates

Being entrepreneurs, we have long since learned not to "put all our eggs in one basket," as the old cliché goes. Wearing our Business hat, we know better than to commit ourselves to just one good client whose situation might change tomorrow and leave us with no income. We've learned the value of diversifying to keep the cash flow stable. We know that diversity usually means client research, teaching, lecturing, writing, editing, marketing, and librarianship, along with volunteer stints in various organizations.

That makes for a lot of hats. But, f course, since readers of the *APG uarterly* are Super Genies, none f you have ever felt like screaming, Help! How do I keep all my hats raight?" Right?

Yeah, right!

Do our multiple hats now rest on necessity, habit, or something more? Are those with untapped talents simply accustomed to certain people doing whatever needs doing—or might they fear that their overtures may not be welcome?

elief in Sight?

Wearing my own Been-There-one-That hat, I can empathize with ıe crowded heads among us. Still, npathy provides no relief from the scomfort we sometimes feel—and ımetimes don't feel when others ink we should. Amid the juggling of ıose hats we may or may not notice ıe conflicts of interest that begin to ueeze our judgments, the overlaps functions and responsibilities that erplex newcomers to the field of genealogy, or the personal ıoices that may cause people in other fields to question the gitimacy of ours.

Because these issues usually buzz beyond the hearing of those ho wear the hats—and because many colleagues grapple with em privately but hate to voice them in public lest their own ıts not be bulletproof—some relief might come from hanging a w of our hats out to air. From that disconnected point, we can ore easily peek inside at some of the rubs that create sore spots r the wearers, their colleagues, and their constituents.

Before the peeks begin, however, one caveat is in order. ll these hats can easily stretch and shrink to fit any one of us, ıt there are few one-size-fits-all answers to the dilemmas they eate. While matters involving ethics or public trust may be ear enough, there are other issues each of us has to decide for ır self.

he Administrative Hat

In an informal audience survey at a recent luncheon tended heavily by state and national leaders in genealogy, most spondents indicated that they hold an elected or appointed ɔsition in three or more organizations. The follow-up question those who wore multiple administrative hats was a simple 'hy? No soul was brave enough to answer, at least not in public. private, the answer was, "Well, somebody has to!"

Something puzzles me as I look across time. When I became tive in genealogy in the early 1970s and noticed the extent which genealogical leaders wore hats for multiple groups, I ıively asked this same question. The answer then was, "Well, mebody has to. There aren't enough volunteers!

Over the past thirty years both the profession and hobby genealogy have exploded. Millions more people are now family historians as compared to the pre-*Roots* era. APG itself has grown from a handful of professionals in 1979 to over 1400 in 2004. So why are there not enough people to spread duties more broadly? When it comes to the responsibility for directing, controlling, and planning the future of our field, particularly at the national level, how do we today justify the overlaps in management and vision?

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Is it a bandwagon effect? We all know the scenario: Joe volunteers for one job, and every nominating committee dials his number because Joe is obviously an easy mark who can't say no. We well know the result, too. Joe is tapped and tapped until, one day, Joe is all tapped out. Then a new Joe has to be found, and the cycle of wear 'em out–use 'em up begins again.

Is ego at play? Do we whose heads are overcrowded want to accept every hat? Or could it be that once we've jumped onto the volunteer train, we fear to jump off? After all, one whose bio says she *has been* president of ABC and *has been* director of XYZ might also be called a has-been.

For whatever reasons, role models in professional genealogy tend to be those whose hats are stacked too high. As one who has shucked many of those hats, I do not mind admitting the obvious: the more overloaded we are, the harder it is to keep our hats on straight—and to keep our hats separate.

The last point is the crux of the issue. The number of hats we choose to wear goes beyond the question of whether we can personally handle their weight. Far more important is the welfare of the organizations we sincerely want to help.

As I privately queried colleagues in preparation for this hat gazing, I heard one worry over and again. Looking at the board of every major organization in our field, year after year one sees overlap between FGS and NGS, between NGS and NEHGS and ASG, between ASG and BCG, between BCG and APG, and from APG to ICapGEN and back to FGS.

Does it matter? Those involved usually say no, but others say yes. For years, constituents have grumbled about a "clique" that supposedly controls all things genealogical. Of course, no issue is that cut-and-dried, but the perception is widespread—and public perceptions are important to the health and success of every activity.

As a "What if?"—perceptions or misperceptions aside—let's say that an APG director also serves as a BCG trustee. On the one hand, we might say that cooperation between the two is desirable. On the other hand, it can be a conflict of interest, because APG represents uncertified people as well as those who have earned certification.

From this perspective, is it not germane to ask whether internal discussions of one group should bleed into the other?

The Editorial Hat

Our multiple-hat syndrome creates conflicts of interest in other ways. For years, one of the most frequent concerns expressed by genealogists attending the advanced and professional tracks of the Samford University Institute of Genealogy and Historical Research has centered on publications. Editors of Journal X, they point out, sit on the editorial boards of other journals. Editors of journals X, Y, and Z sit on the selection committee to pick the editors of other journals. Members of one "book prize" committee also sit on other "book prize" committees. In some cases, they actually award prizes to books with which they have been personally involved.

Those who object to wearing dual and triple editorial hats cite several grounds for concern. It creates a "closed circle" that's hard for writers to break into. It limits creativity and produces journals that look and sound the same because the same people set the parameters and make the choices. What's more, our constituents worry, they dare not offend someone in one forum lest it kill their chances of publishing elsewhere.

Again, these issues are not so simple, but critics raise a valid point. Given the number of people producing superb work in genealogy today, what is the justification for dual and triple editorial hats that prompt journal readers to use such words as "cronyism" and "editorial incest"?

The Publishing Hat

A third major complaint about the multiple-hat syndrome also centers on the press—specifically companies and societies that use their own magazines and journals to publish "reviews" of their own books. What's more, observers note, the "reviews" may even be written by their own employees.

These practices obviously beg the question, "What's the difference between a book review and an ad?" By standard definitions, in an ad, the seller tells the reader how great the product is. In a review an unbiased and impartial third party tells the reader whether the product really is as great as the ad claims.

That's the theory, as well as the ethical principle, but what's the reality?

• If I edit the quarterly of the Bygones Foundation and I solicit outside reviews of books published by the Bygones Foundation, what happens when a reviewer rips one to shreds?

Will my employer expect me to "kill" it or tone it down? If I actually perform my duty as a wordsmith and edit the review, will my alteration of the critic's text be perceived as professional or self-serving?

• If, as an employee of the Bygones Foundation, I am asked to review a Bygones Foundation book, and objectivity compels me to tell my reader about serious problems that my colleagues and employer overlooked when they sent the work to press, what kind of "review" am I going to get when I come up for my next employee performance review? If the book is truly worthy, of course I'm justified in praising it—but why should I be the one to write the review in the first place? Is there no one else capable? No matter how unbiased I try to be, readers will have difficulty seeing past my conflict of interest. Am I in a no-win situation?

• If I am the publisher and I ask an employee to write a review of our own book, how will I deal with the perception that we fear to submit the book to a "fair and balanced" reviewer? If I instruct my periodical editors to publish reviews of house books and they solicit critiques from impartial third parties, as they should, am I willing for those editors to print criticism? In the case of complimentary reviews, do I truly think our readers will not take them with a grain of salt?

Consumers are wary, skeptical, and cynical. They should be. After all, those traits reflect the bedrock principle of our field. As genealogists, the first consideration we apply in evaluating any evidence is whether the creator is in a position to be biased or influenced by the outcome. How, then, can publishers and societies use their magazines to "review" their own books without inviting skepticism that hurts genealogy's image and their own?

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The Educational Hat

The most critical need facing our field today is for educational programs that lead to academic degrees. Professional and scholastic legitimacy, as well as economic viability for practitioners are at stake. The last five years have seen significant developments; however, the fact that these innovations are still outside "traditional" academic venues has introduced another point of conflict: identifying and upholding the line between academic training and professional certification or accreditation.

Within most professional fields that have an "intellectual" rather than a "technical" base, the line is clearly drawn. Within law, medicine, engineering, teaching, and numerous other professions, academic institutions provide the education and award a degree that says the holder has attended classes and earned at least passing grades. Beyond that point, degree holders who need or seek professional credentials present themselves to a board or a bar for independent testing of their knowledge and the skills with which they apply that knowledge.

Thus far, virtually every educational program in genealogy has held to that standard.[1] Indeed, every such program in the U.S. has done so; however, as new programs develop, founders sometimes see advantages in blurring the professional line. New programs need students. Will they come, in sufficient numbers, if no credential is promised at graduation?

Again, good intentions battle realities. Career-oriented educational programs attract students by promising two things: quality education and job opportunities upon completion of the program. Yet, the experience of traditional academic programs clearly shows that—whatever the program—some graduates do not absorb the fundamentals well enough to pass credentialing exams.

How, then, can any academic program promise credentials to all students? How would such a program deal with marginal students who manage to pass the coursework but could not meet longstanding certification or accreditation standards?

If a program adheres to standards and denies credentials to some of its own graduates, the ill will and loss of faith among students could reduce enrollment to the point that the program is no longer viable. Yet, the alternative—lowering its credentialing standards to ensure that all graduates qualify—would lower the standards of the field itself.

Is there not a reason why the professional line has long-since been drawn between academic degrees and professional credentials?

The Professional Hat

As professional genealogists, our greatest challenge in earning public respect lies in a related issue: our reluctance to apply long-established professional distinctions between earned credentials, earned degrees, and honorifics. Bluntly put, neither the academic world nor the professional world respects practitioners who use honorifics as a substitute for earned degrees or earned credentials.

An academic who used an honorary degree in a professional setting would earn scorn, not respect—as would an academic who used a degree to assert competency in an unrelated field. A professional who passed off an honorific as a credential in dealing

with clients would earn censure if not disbarment.

Should this matter in our field? The sister professions that scorn us do not quibble: every legitimate profession is expected to police itself. It must in a world in which the public rarely understands the meaning of any set of postnominals.

The real issue is whether we will observe that professional line. Are we willing to sacrifice our egos to earn the respect we cry for? The issue is a sensitive one, and in fairness to all professionals who hold and use honorifics, we have to acknowledge that pressure does exist from the organizations that bestow those honors. Not granting "equality" to their honorifics, unfortunately, is perceived as "snubbing" the organizations that granted the honors. Rather than offend, most of us have simply yielded to the culture.

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It is time to reassess that culture. Our profession was born within antiquarian societies, and the earliest professionals used the honorifics of those organizations as a badge. They did so, however, because legitimate, tested, professional credentials did not exist for them. In 1940, the American Society of Genealogists changed that situation with the institution of genealogy's first peer-reviewed structure for granting credentials. The Board for Certification of Genealogists and the FHL/Genealogical Society of Utah's accreditation program followed suit in 1964. That was forty years ago.[2]

As professionals today, we are long overdue to make a choice. If we let ego overrule reason and cling to vestiges of the antiquarian culture rather than the ethics of professional fields and the standards of scholarship, then what right do we have to be indignant when we are treated as ancestor worshipers instead of professional genealogists and scholars?

Straightening the Professional Hat

If we choose the Professional hat over the Antiquarian hat, one further issue remains to be resolved. Where might we draw the lines for use of academic degrees, tested credentials, honorary degrees, and honorifics? The practices of other professional and academic fields can be distilled down to the following precepts:

All Degrees, Credentials, and Honors are appropriate to biographies, resumes, and obituaries, where there is space to properly identify them.

Academic Degrees are appropriately used as postnominals when they are earned in the field. For us, that would be degrees in genealogy, family history, or history—recognizing, of course, that an academic degree in a general-history field is a pertinent adjunct but not a substitute for tested competency in genealogical research itself.

Tested Credentials are the essence of professional postnominals in every field and should be in genealogy, as well—so long as they are granted by authoritative, independent agencies on the basis of competency examinations. (The APG Guidelines for the Use of Credentials and Postnominals, passed in 1995, appropriately defines those agencies.[3]) However, tested credentials in other fields would not be appropriate postnominals in genealogy unless clearly related to the professional practice of genealogy (for example, a Certified Geneticist who lectures or writes about genetics in genealogical forums, while clearly identifying that credential for what it is).

Honorary Degrees have no professional or academic standing. Therefore, they do not qualify as postnominals in professional or academic contexts.

Honorifics, such as fellowships based upon service to an organization or high visibility in a field, are not professional postnominals. They are appropriate in publicity bios and résumés where they can be explained—as with other honors and awards. (The APG Smallwood Award makes a convenient example. It is properly mentioned in a bio, but we would not use its acronym as a postnominal to imply tested expertise.) Otherwise, honorifics granted by a society would be appropriately featured in publicity for that society—as, for example, FNGS used in publicity for events of the National Genealogical Society, FUGA in publicity for events of the Utah Genealogical Association, or FSA Scot for events of the Society of Antiquaries, Scotland.

When we distance ourselves from our personal involvement and consider the issue objectively, is it not a no-brainer? Postnominals, used in a professional context, are presumed by the public to represent tested competence. As professionals who subscribe to the codes of APG, BCG, ICapGEN, and genealogy's other legitimate credentialing bodies worldwide, have we not pledged to present our qualifications clearly and in a manner that does not confuse or mislead our public?

Reassessing Our Hats

Every profession is a reflection of the people who practice it. Because professions are intellectual disciplines, each practitioner has a great measure of freedom to make choices and decisions

that affect his or her individual practice; nonetheless, the ord discipline is applied to research fields for an obvious reason. he choices we have to make as professional genealogists are ıtellectually, financially, and ethically challenging. The issues ıised here reflect all these aspects. Some are matters rightly left to ıdividual choice. Others are ones that professions traditionally efine because they affect the welfare of the field itself. But all are sues that deserve to be based on reasons stronger than, "That's hat we've always done."

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. The notable exception to the separation of education and credentialing functions is the Institute of Heraldic and Genealogical Studies, which has granted credentials in England since 1961. For more information see Claire Mire Bettag, "Educational Preparation," Chap. 2 of *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians*, Elizabeth Shown Mills, ed. (Baltimore: Genealogical Publishing Co., 2001): 18–42, particularly 39.

. Within the U.S., these three are the only agencies issuing credentials that reflect tested competency in genealogy. Within the American Society of Genealogy (est. 1940), fellowship is based solely on the quality of published scholarship that withstood years of peer-review prior to a critical-review process within ASG itself. Associates of the Board for Certification of Genealogists (est. 1964) have passed rigorous testing and submit to re-evaluation every five years. The International Commission for the Accreditation of Professional Genealogists (ICapGEN, est. 2000) is the successor of the FHL/GSU-based accreditation program. For a survey of recognized certification and accreditation programs worldwide, see Elizabeth Shown Mills, Paul F. Smart, Jimmy B. Parker, and Claire Mire Bettag, "Certification and Accreditation," Chap. 3, *Professional Genealogy*, 43–58.

3. A copy appears in Appendix B, *Professional Genealogy*, 606–7.

Elizabeth Shown Mills, CG, CGL, FASG, is proud to hold honorifics from both the National Genealogical Society and the Utah Genealogical Society, as well as APG's Grahame T. Smallwood Award—and equally proud to say that she is now a has-been in a number of organizations. Today, she restricts her administrative hat to a trusteeship in the Board for Certification of Genealogists and conducts the Advanced Research Methodology track of the Samford University Institute of Genealogy and Historical Research.