

20 Ways to Play Nice in the Genealogy Sandbox

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It should be simple to get along with other genealogists, especially since the genealogy community is known as a dedicated and intelligent group of researchers all focused on a similar goal: finding our ancestors. Researchers are people and things like the ego and even misinformation or lack of knowledge can be like sand in the gears of the genealogy machine. Here are some of the most common problems and situations and how to solve them.



Getting What You Need from Family Members

- Use the best contact method.** Understand that some family members don't respond well to technology so a phone call or in-person interview might be best. For others, especially those that are busy, email is best.
- Bring technology to your interview.** Many relatives don't want to part with photos, documents and other items that are relevant to their family history. With today's technology including mobile scanners and mobile apps, you should be able to record interviews and digitize documents.
- Don't frame the discussion.** Often if we get too specific in terms of what we need, we miss out on other information the person might have (ex: "I need the death location for Aunt Hildegard"). Prompts are good for an interview but keep them general and open ended.
- Say "thank you."** If you've conducted a long interview or if the relative has provided you with a large amount of information, send a thank you note (handwritten, of course) and perhaps copies of some old photographs or a printed version of your research.

How to Deal with Librarians, Archivists, and Others

- Employees or volunteers, they are still people.** Whether you are dealing with a government civil servant, a staff member of a library, or even a volunteer, remember that they are just like you. Good days, bad days, etc. You shouldn't tolerate rudeness but try to keep everything in perspective.
- Call ahead.** Make sure you know the exact location and hours of operation for the specific day you will be at the repository. Also, ask for the name of the best person to talk to once you arrive. Briefly tell them what you are looking for (avoid "The Story") and they might surprise you by having resources ready for you.
- Find common ground.** Likely the archivist or librarian is a researcher just like you. And just like you, they are asked to assist others with their research goals. Respect their education, their intelligence and their role in the organization. And they'll respect you as well. "If people deal with the general public, they've probably seen it all. If they eventually know you, you're not the public."
- Remember the 5 Cs: Clear, Concise, Complete, Congenial, and Compensation.** Avoid telling "The Story" when requesting records: the story of your ancestor, where they lived, who they married, etc. Talk in a courthouse like a lawyer, not a genealogist. In other words, say 'I am looking for a deed.' No need to tell your entire story."

Correcting Information in a Collaborative Environment

- Understand the capabilities of the platform.** When dealing with family tree websites or indexed/transcribed records, determine what can and what can't be done in terms of making corrections. This includes reading the Terms of Service agreement to understand who owns user data once it is uploaded.
- Ask and ask nicely.** A "virtual" smile goes a long way. Ask the other researcher if they'd like the data you have found for their research. Ask them to update online postings; not to prove that your research is "correct" or "better," but to help all genealogists who find the research in the future.
- Advocate and educate.** Often, these situations occur with new genealogists who don't understand copyright or the need to give credit. Be courteous and let them know that you need attribution and why.
- Avoid "right" and "wrong" statements.** The easiest way to alienate a fellow genealogist is to tell them that their research is wrong. Even if the research is incorrect, your goal should be to improve the current research and to help future researchers.
- If necessary, publish your own research.** Sometimes you can't contact the genealogist, or they refuse to update their information. Remember that you have at your disposal a variety of tools to make sure your research is just as visible as any other genealogist.
- Stick to the facts and cite your sources.** Again, if it is facts, then technically you can use the information. However, if it is sourced, I would do the research myself and then use the facts as I wanted. Make sure your source citations states when you found the record!

The Do's and Don'ts of Collaborating and Sharing

- Don't give to get.** It can be difficult to embrace an abundance model; once you start to share with others, you get the hang of how it works. Don't fall into a "tit for tat" game, but don't be a sucker either.
- Ask for attribution and give attribution.** If you want your work credited, "walk the walk" on attribution. Set reasonable rules when providing your research to others and ask for attribution. Again, providing the ready-made text that credits your work not only makes it easier, but can also help educate others.

Genealogy Conflict Resolution

- Step back and research!** Research the chain of events and the facts that brought you and the other person to the conflict. Genealogists are smart cookies and there's no reason we can't apply our analytical skills to these situations as well.
- Make a peace offering; broker a cease fire.** Communicate in writing or via email such as: "We disagree about _____ and I respect your opinion. I feel there are way more benefits to working together than against one another. I'd like to resolve our conflict as follows . . ." Doing so does not mean you are operating from a point of weakness. It means you are a smart operator.
- Capitalize on the energy.** A little secret about story writing that is true for genealogy: conflict brings about change and things happen. There is energy in conflict. You just need to learn how to channel it effectively. Don't get wrapped up in drama which can be a total energy suck and wear you out.
- Guard your reputation.** Because you are not in "right relationship" with another genealogist, doesn't mean they can bad mouth you or damage your reputation. Setting up a Google Alert for your name is not paranoia; it is smart use of technology.