

## PROFESSIONAL GENEALOGIST EVALUATION TEMPLATE

Use this template to assess whether a genealogist is the right fit for your project. It is not essential that all sections be completed. Think of it as a checklist to prompt you of the things you need to consider.

### YOUR PROJECT REQUIREMENTS

*Complete this section before contacting genealogists to help identify the right match*

Project objectives (what do you want to achieve?):

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Geographic focus (countries, states, counties, towns):

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Time periods involved:

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Specific families/surnames:

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Main challenges/brick walls:

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Types of records likely needed:

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Special requirements (language skills, palaeography, DNA analysis, etc.):

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Your budget range:

Preferred timeline:

Preferred communication style:

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## **GENEALOGISTS**

Complete one of these for each genealogist you consider.

### **CONTACT INFORMATION**

Genealogist Name: \_\_\_\_\_

Business Name: \_\_\_\_\_

Contact Details: \_\_\_\_\_

Website/Portfolio: \_\_\_\_\_

Date of Consultation: \_\_\_\_\_

### **EXPERIENCE & SPECIALISATION**

Years of professional genealogy experience:

Geographic specialties (countries/regions):

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Time period specialties:

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Source type expertise (land records, military, passenger lists, etc.):

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Technical skills (DNA analysis, palaeography, languages, etc.):

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Relevant experience for your specific project:

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## QUALIFICATIONS & PROFESSIONAL DEVELOPMENT

Formal qualifications (university degrees, diplomas, certificates):

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Professional memberships:

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Continuing education/recent courses:

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## PROJECT UNDERSTANDING & APPROACH

How well did they understand your project needs?  Excellent  Good  Fair  Poor

What questions did they ask about your project?

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What approach would they take?

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What realistic outcomes did they suggest?

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What challenges did they identify?

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### **PRACTICAL CONSIDERATIONS**

Availability/timeline:

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Hourly rate or project fee:

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Payment terms:

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What format will deliverables be in?

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What ongoing communication can you expect?

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Do they provide written contracts?  Yes  No

### **REFERENCES & PORTFOLIO**

Can they provide references from recent clients?  Yes  No

Did they show examples of their work?  Yes  No

Quality of work samples:  Excellent  Good  Fair  Poor



## Decision Checklist

- Experience matches project needs
- Qualifications/credentials satisfactory
- Communication style is a good fit
- Fees within budget
- Timeline works for your needs
- Positive references/portfolio
- Written contract available
- Realistic expectations discussed

Overall rating: \_\_\_/10

Decision:  Hire  Get second quote  Keep looking

*Remember: If you haven't worked with them before, consider starting with a small project to test the working relationship.*