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Request for Genealogical Research

Your Name _____ Date _____

Address # 1 _____

City _____ State _____ Zip code _____

Telephone # 1 _____ Fax _____ E-mail _____

Address # 2 _____

City _____ State _____ Zip code _____

Telephone # 1 _____ Fax _____ E-mail _____

Dates for address 1 and 2: _____

Where did you find out about my services? _____

Initial research requested (include short range goals - please be as specific as possible)

Note: It is very important that I have *all* facts known to date about your request - please include the necessary copies with this application. Without this background, duplicate research may be performed.

Long range goals (research goals and other, e.g., family publication, etc.):

It is strongly recommended that you contract for a minimum of 15 hours for extended research.

Number of hours (circle one): 10 15 20 25 30 Other Hours _____ Open-ended _____

Special Introductory Offer: Package # _____ with _____ hours @ \$ _____ total.

Amount of retainer with initial request (half the total) _____ (Please make checks payable to Dr. Robert L. Rafford)

Amount authorized for photocopies (usually not more than \$20.00) \$ _____ and for certificates \$ _____

Do you wish certified* copies of vital events? _____ Please specify _____

I have attached information already collected _____ Are additional data being sent separately? _____

Type of genealogical software program used: _____ When would you ideally like your report? _____

*Only Certified copies of vital records from towns are allowed; death and marriage records are \$5 each, birth are \$15 each.

Please note that research will be performed in the order received. Your report may take up to 120 days to complete. If you send a GEDCOM of your genealogy to date via disk or Internet that would be helpful. I reserve the right to duplicate research sent to me if I need to examine that record for more detail.

>>If it takes a shorter period for research, any unused time will be reimbursed to you. If I need more time, I will inform you and ask for permission before proceeding.<<

April 2007

Welcome!

I. INTRODUCTION

- A. You have asked me to perform professional genealogical research for you. This agreement, the Application for Genealogical Research and the accompanying Service Description, describe the agreement between us regarding that service. If you agree with these terms and the attached Service Description, please sign this, make a copy for yourself, and return it to me with your research request.
- B. I will undertake to perform research for you to the extent you have requested, using your short term and long term goals as guides. I will perform as an independent contractor in accordance with prevailing professional standards in genealogy, including the Code of Ethics of the Association of Professional Genealogists, and will use my judgment to direct the research in the most productive manner for the achievement of your goals.
- C. Because I do not wish to duplicate work already performed, you will supply me with information already obtained to the extent possible. I do reserve the right to duplicate some research already accomplished if I feel the attending conclusions or that research are incomplete or incorrect. Our agreement will become effective when I have received your material, a copy of this contract with your signature accepting it, and your payment of an initial fee to engage my services, which is not refundable after I commence work. I will contact you if I feel more work is necessary to complete the goals you have established if you have checked that, and will proceed only if you authorize additional work and payment by telephone, mail or email.

II. REPORTING

- A. After I receive your materials I will analyze the problem, complete research and present to you your desired product, usually a report, containing a log of research, documentation of all sources searched, a summary of the research with the basis for my conclusions, suggestions for further research, and copies of relevant documents. Simple requests of course will take much less time and will not have any formal report explaining them.
- B. I usually include some up-to-date pedigree charts and family group sheets to illustrate where the research has developed, but these charts are not to be construed as evidence of the data contained on them. Evidence of the facts, if it exists, is in the body of the report.
- C. I strive to use original sources (such as vital records) in gathering evidence of facts. However, because of financial or time constraints, you may be satisfied with derivative evidence (such as compiled sources, i.e., genealogies, town histories, etc.). The customer agrees that I will use my judgment, based on time constraints, to gather the best evidence possible for the stated goals within the time allowed.
- D. I will strive to get your report to you as quickly as possible. My present goal is to return a report to you within 90 days or sooner. Occasionally factors may lengthen that time, **sometimes 120 days and longer**, but rest assured that I am always finding new ways to shorten response time, because I know how anxious you are for the data! I will attempt to contact you when events interfere with the timeliness of reporting, and I appreciate your patience with the process. I believe the professional quality of my research and the reports will more than please you.

III. CHARGES

- A. A fee is charged of \$ 55.00 per hour. If you are taking advantage of a special offer, please describe: _____ hours for \$ _____. The fee covers research and all related activities including reporting, analysis, data entry, reading and interviewing. The retainer is non-refundable once research is begun. Photocopies, certificates and other requested items are in addition to these fees, and you have specified on the first page the maximum to use for these.
- B. There is a charge of \$ 0.50 per mile for research-related travel outside the 70-mile round trip to Hartford. Other trips may incur a per-mile charge, but I will subtract the travel to and from Hartford for any other trips, saving you money (for example, Danbury is 30 miles from me, so travel there will not incur extra expense).
- C. Reimbursement of out-of-pocket expenses including photocopies at \$ 0.25 per page (for example, 1 copy for research and a duplicate file copy for each page I send to you). Other printed pages (e.g., e-mail) are \$ 0.15 per page. Certificates and other expenses directly incurred in pursuit of a customer's research are billed at cost. I will send you photocopies of records and other materials as I deem necessary. I usually extract all information from these records into my reports and files.
- D. Telephone costs are billed at cost in the collection of data related to customer's research.
- E. There is an additional \$60.00 surcharge for each research trip to either New York or Massachusetts. (I will inform you beforehand if these trips are necessary).

(Please make checks payable to Dr. Robert L. Rafford)

At least half the contracted amount, or \$500.00, whichever is less, should be included with the application. The customer will be billed for the remaining amount with the final report, which may include extra out-of-pocket costs. Full payment is due upon receipt of the report. These charges are subject to change without notice, but I will strive to contact you before any changes go into effect.

IV. RESEARCH

- A. My primary research area is the nineteenth and twentieth centuries throughout all Connecticut. Today, because of extensive holdings at various Connecticut archives and because of the Internet, I am able to perform a limited amount of work across the country. But primary research in an area other than Connecticut may require the services of a researcher in that area. I will then confer with you about sub-contracting research or may refer you to another researcher altogether for extra-Connecticut research.
- B. When you contract for a fixed number of hours, approximately half are for repository research and half for the analysis and report completion. Travel time is not charged except for extraordinary trips about which you will be contacted beforehand. I strongly urge you to consider a minimum of fifteen hours initially and twenty hours for lengthy research. However, I understand that there may be reasons you wish to begin with fewer hours.
- D. When I perform research, you become the owner of that research. I retain the copyright to the report. I reserve the right to publish portions of it, giving you the credit for underwriting the research. In addition, information you supply to me that is not a matter of public record will be held in confidence. Occasionally I would like to submit samples of my research as examples of my work. If you authorize me to submit your research as an example or for possible publication, please initial the appropriate spaces below authorizing me to do so.
- E. I retain the copyright to the report and the manner in which I have expressed the information in it. You may make a limited number of personal copies as a "fair use" of the copyrighted report, but you agree that you will not otherwise publish or make multiple copies of the report without my written permission. You agree that if you make limited distribution of any anything that includes my research, in whole or in part, you will report it accurately and credit me as the source.

V. MISUNDERSTANDINGS

We both agree that if any dispute arises out of this agreement, we will attempt to settle it between ourselves first. If that does not work, we will use the arbitration services of the Association of Professional Genealogists as our sole remedy, and accept as final and binding on both of us the arbitration decision. I am grateful for the opportunity to be of service. I hope that you, too, will be pleased with my research and reports.

Sincerely,

Robert L. Rafford

I accept this agreement:

Signed

Date

You may use my materials for professional review:

Initialed

In addition, you may use my research in personal publications, provided you credit me as the sponsor of your research.

Initialed

You may place a copy of the research at the Connecticut State Library or another repository. The waiting time and other conditions to do this are _____

Please sign this copy and return it to me; you should make a copy for your records.

Northeast Professional Genealogy Mission Statement

- Perform careful, accurate and documented genealogical research to fulfill the customer's stated goals.
- Utilize the highest technology and most extensive means of acquiring genealogical data within my reach, assuring the best results for your family history.
- Deliver the best quality professional reports that will become treasured family documents in themselves.
- Maintain customer satisfaction through quality workmanship and reasonable costs.
- Keep myself accessible to the customer at all times.