

Genealogical Society of Queensland Inc (GSQ)

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POLICY NAME	Research Policy			POLICY NO.	GSQ R 1
EFFECTIVE DATE	1.1.2024	DATE OF LAST REVISION		VERSION NO.	1
ADMINISTRATOR RESPONSIBLE	Research Convenor	CONTACT INFORMATION	researchconvenor@gsq.org.au		
APPLIES TO Apply group names to define applicable areas of staff.					
GROUP 1	Research	GROUP 2		GROUP 3	
GROUP 4		GROUP 5		GROUP 6	

VERSION HISTORY				
VERSION	APPROVED BY	REVISION DATE	DESCRIPTION OF CHANGE	AUTHOR
1				

REVIEW AND APPROVAL

The Research Policy is to be reviewed annually by the Vice President in conjunction with the Research Co-Ordinator.
The reviewed Policy is to be approved annually by the Management Committee following the Review.

ADDITIONAL NOTES

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SCOPE

Research conducted by GSQ volunteers on behalf of members or non-members.

POLICY STATEMENT

The Policy is a set of guidelines for the performance of research duties. to enhance the profile and reputation of GSQ as a professional genealogical organisation, support, and transfer expertise to GSQ members, and generate income for GSQ.

TERMS AND DEFINITIONS

Define any acronyms, jargon, or terms that might have multiple meanings.

TERM	DEFINITION
Client	Any person (s) or party completing a Research Request - Appendix "1".
Authorised Delegate	A delegated member of the Management Committee.

POLICY SECTIONS

Goals of Family History Research Group.

The goals of the GSQ's Family History Research Group (the Research Group) are:

- a) To provide genealogical research at GSQ premises, or other sites, on an unpaid basis as requested by GSQ members who are unable to undertake such research, including providing "Look Up" facilities for distant members from outside the 100k zone– the extent of unpaid "Look Up" to be set at five (5) hours per annum.
- b) To provide genealogical research on a paid basis as requested by GSQ members or non-members, to be referred to as clients.

Members and Management of the Research Group

The GSQ Management Committee shall appoint to the Research Group:

- a) The Convenor of the Research Group, to oversee the operation of the Research Group, to deliver on the administrative and financial duties of the Group, to endorse Expenditure Reimbursement Forms, to provide for training and build expertise of researchers, and to provide reports to each meeting of the GSQ Management Committee.

- b) The Authorised Delegate of the GSQ Management Committee who is to approve reports before such reports can be provided to clients.

The Management Committee may give directions to the Convenor or Authorised Delegate from time to time. This might include, for example, authorising undertaking particular large scale research projects, or that the Convenor is the first point of contact for research requests.

The Convenor of the Research Group may appoint from time to time:

- a) A Deputy Convenor to assist with the administration and financial requirements for the Group,
- b) A Chief Researcher to lead research projects, and assist to build expertise of researchers,
- c) Researchers for the Research Group with the necessary ability to undertake the work, obtained for example via academic qualifications or through demonstrated expertise and experience in undertaking research. This might include expertise in a particular area of family history such as for particular countries or regions (e.g., Scandinavia, Italy, or Ireland), military history or convict ancestry.
- d) Special project teams for specific projects as required, for example to comply with a Research Agreement.

Researchers will receive training and support to develop or expand their expertise to carry out and report on research in accordance with standards under this policy.

Standards for Researchers

Researchers undertaking duties for or on behalf of the Research Group are to:

- a) Act in accordance with directions from the Convenor or the Management Committee's Authorised Delegate.
- b) Act, when undertaking genealogical research, within the agreed scope for a project and any subsequent revisions of scope agreed to with the client.
- c) Comply with professional standards when undertaking genealogical research, GSQ's code of ethics and GSQ's editorial policies.

Examples of professional standards are:

- I. Acting with personal integrity,
 - II. Providing all source citations in any documentation or reports,
 - III. Being honest and accurate in research, always trying to examine the original source rather than printed sources, and avoiding, so far as possible, the misquotation of documents or the citing as of any questionable source as authoritative. This includes avoiding making exaggerated, misleading, false, or unproven statements and not being a party to such actions by others,
 - IV. Being discreet in dealing with clients and the public, respecting the confidential nature of the relationship with clients and the hurt that can arise from revelations about family history. Information about the client or the client's affairs or research for which a client has paid are not to be disclosed or published without the client's prior consent,
 - V. Not acting in a manner detrimental to the reputation and best interests of GSQ.
- d) Comply with restrictions on research under relevant Acts and Regulations such as copyright and privacy requirements and obtaining consent if required from living persons.

- e) When undertaking research, if any new material, or any copy, modification or enhancement of any existing material is created, ensuring that all intellectual property rights including copyright is assigned to GSQ and such material is delivered to GSQ.
- f) Accept that as a researcher, they are not an employee, officer, or agent of GSQ and must not represent themselves as such.

Scoping and Setting fees For Research Projects

Research Projects are to have a clear scope and defined outputs for the research to be undertaken. The Project's scope is to be set out in a Research Agreement based on

The agreed scope is to provide clarity about the goals of the client, agreement about what research is wanted, who it is for, and for what purpose (for example, investigating personal history or to provide information for legal matters).

An initial interview may be needed to determine exactly what research is being asked for, for example the full name of persons of interest, a relevant span of years, places of interest, events such as births, marriages, deaths, offspring, siblings, or immigration details. A person making a research request should identify any information and sources that have already been searched by them.

Examples of matters covered in project scope vary in size and complexity but can include:

- a) Setting document styles, specific standards for recording documentary sources and citations or software for reporting results, such as particular trees, and whether a report is to be provided in hard copy or electronically.
- b) Requesting the tracing of ancestral line to a particular point such as to the beginning of Civil Registration in a particular country of origin.
- c) Locating a particular ancestor or solving a specific "brick wall".
- d) Undertaking research for ancestors or relatives in connection with legal actions such as rights of inheritance.
- e) Transferring the results of family history research already undertaken by a client to a specific digital format.

The Schedule of fees for Research Projects are set by the Management Committee. Fees vary according to the scope of a Project. Fees will be negotiated prior to the commencement of a Research Project, agreed by the client, and documented in a Research Agreement.

For example, a minor research project for a member such as for one name only, might attract the minimum project fee of \$110.00, plus the costs of certificates, and any 'out of pocket expenses' directly relating to the research. These costs might vary if hard copy reports are requested. Payment in advance, in part or in full, may be required.

For example, a large-scale commercial research project will have fees set in the Research Agreement, according to the complexity of the project. Fees could be based on hourly fees, out of pocket expenses, an initial payment on commencement of a project with further progress payments at agreed points, ie delivery of particular research outputs and final reports.

The Schedule of Fees will be as published on the GSQ website at the time of the Research Agreements completion.

Administration of Research projects.

Research Projects will be commenced on the agreement of and the signing the Research Agreement and, if specified under the Agreement, making any initial payments.

Records are to be kept for each project will include:

- a) Research Agreements and any amendments to same with agreed fees.
- b) Any correspondence or emails relating to the Agreement, payments, delivery of reports, general correspondence, and other relevant matters.
- c) Any reports to clients, invoices, and fee payments.
- d) Expenditure Reimbursement Forms (with supporting receipts where available) submitted by Researchers for any costs incurred as a result of their research.
- e) Regular reports made to the Management Committee on all ongoing projects including on research progress and financial reporting (including for example, any fees charged to date on larger scale research projects).

Research Reports provided to Clients.

Research Reports are to be as clear and definite as the facts allow, offer candid advice concerning the possible and probable results of lines of research, and avoid unnecessary duplication of effort and research.

Clients are to be provided with Reports on the outcome of research as agreed under the Research Agreement on the following basis:

- a) The Research Report complies with the Research Agreement.
- b) The Research Report complies with the standards under 3. Standards for Researchers.
- c) The Research Report has been approved by the Authorised Delegate of the Management Committee.
- d) All fees have been paid.

For example, the Research Report is in the required format or software. It contains a summary of the information submitted by the clients on what was requested and the prior research by the client (to avoid duplication of effort), a listing of what materials have been searched, what information was located, commentary on what was found and what it means, suggestions for further research and any supporting certificates and/or documents.

Dealing with Complaints.

If a client considers that a Research Report or underlying research is not satisfactory, the matter should be progressed in accordance with the Complaints Policy of GSQ.

Rewarding Research Volunteers

Arrangements may be made to recompense or reward volunteers working on projects of scope and complexity which have required volunteers to undertake excessive hours or responsibilities. Such arrangements are to be approved in advance by the Management Committee or its Authorised Delegate.

Arrangements for rewarding research volunteers will be generally subject to the following conditions (with additional matters as approved by the Management Committee or its Authorised Delegate):

- a) A researcher must have worked on a commercial project for a minimum of 10 hours. Hours worked must be supported by timesheets.
- b) The value of the reward will be no more than 5% of the revenue from the approved hours worked.
- c) GST and incidental expenses will not be included in revenue calculations.
- d) Rewards will not be monetary, but may, for example, include membership discounts, provision of educational opportunities, attendance at family history events, provisions of items from GSQ bookshop, or publicising the contributions of volunteers to GSQ.

EXCEPTIONS

No exceptions scheduled.

Attachments

1. Research Request
2. Agreement for Genealogical Research
3. Pricing Schedule as at 1.1.2024.

ROLES AND RESPONSIBILITIES

ROLE	RESPONSIBILITY
Research Convenor	Maintain and Update Policy
Researchers	Implement Policy

CONTACTS

SUBJECT	CONTACT	PHONE	EMAIL
Research Convenor	Graeme Moulton	0400 401 875	researchconvenor@gsq.org.au