

RUSA Guidelines for Instruction in Genealogical Librarianship

History:

Prepared by the Genealogy Committee of the History Section (HS) of the Reference and User Services Association (RUSA) of the American Library Association (ALA). Originally prepared as Guidelines for a Unit or Course of Instruction in Genealogical Research at Schools of Library and Information Science 1995, Revised 2004 and 2007, approved by the RUSA Board of Directors, January 2007. Revised 2002. Approved by the HS Executive Committee, March 2022. Approved by the RUSA Professional Resources Committee, 7/7/2023.

Purpose:

These guidelines serve faculty members who design and/or teach a genealogical librarianship course, or who include such content in a broader course. In addition, those who provide continuing education to library professionals in the area of genealogical resources and services can use these guidelines to identify appropriate topics.

Introduction:

Effectively meeting the information needs of genealogy patrons requires specialized knowledge and skills. Librarians serving genealogy patrons should be trained to assist patrons in becoming information literate in genealogical research. These librarians need to know how to assist patrons in achieving their genealogical goals of locating, evaluating, and recording information. They should be able to familiarize patrons with basic genealogical research methodologies and how to formulate research questions and a research plan. Depending upon library policies and procedures, these librarians may provide limited genealogical research services. They are also expected to be able to assist researchers in navigating the broader environment of historical and genealogical resources and services, including referrals to other repositories and societies. Librarians serving genealogy patrons have a role in collecting, preserving, and making accessible materials needed for effective genealogical research, and may collaborate with volunteers and organizations such as local historical and genealogical societies in achieving these goals. Practical instruction in genealogical librarianship prepares public, special, and academic librarians to better serve genealogy patrons by developing such knowledge and skills.

1.0 Course Content

Instruction in genealogical librarianship should encompass the following core content. Each content topic has a corresponding section below that lists recommended learning concepts to include.

[2.0 Overview of genealogical research and the librarian's role in assisting patrons](#)

[3.0 Basic genealogical research methodology and major research resources](#)

[4.0 Orientation and education of patrons, including library programming](#)

[5.0 The genealogical reference interview](#)

[6.0 Genealogical collection management](#)

[7.0 Genealogical research and lookup services](#)

[8.0 Referrals to other repositories, online resources, and professional genealogists](#)

[9.0 Working with volunteers](#)

[10.0 Working collaboratively with local genealogical and historical societies](#)

[11.0 Ethical and legal issues](#)

[12.0 Professional development of genealogical librarians](#)

2.0 Overview of genealogical research and the librarian's role in assisting patrons

2.1 Librarians should accommodate genealogical researchers' varying goals, motivations, and experience levels by providing resources and services.

2.2 Librarians and other library staff should provide: patron orientation to use of resources and services, basic reference service, access to online resources, a reference collection, circulating books, interlibrary loan, referrals to other resource centers when appropriate, microform reading/printing equipment, and other appropriate support technology. Even lacking a dedicated genealogical collection, librarians can guide patrons in genealogical research.

2.3 Librarians should engage in outreach activities for their genealogical collections and services, and should design and implement educational programming in the area of genealogical research for local communities.

3.0 Basic genealogical research methodology and major research resources

3.1 Librarians must understand how to use basic genealogical research methodology in an ethical and legal manner, including: beginning research with the most recent generations and working backwards in time through each generation; using home sources; focusing research on a specific individual or family group; using bibliographic tools to identify and locate previously published genealogical material relevant to the family of interest; identifying appropriate geographic jurisdictions in order to learn the availability and location of relevant records; analyzing and evaluating sources, information, and evidence; organizing and documenting research and its conclusions using paper systems and/or computer-based tools; using standard genealogical citation methods; and sharing the results of genealogical research in print and/or online forms with appropriate repositories.

3.2 Librarians should be familiar with the content and use of these major types of genealogical resources: vital records; censuses; city and rural directories; newspapers; wills, probate, and other court records; military records; land and property records; immigration and naturalization records; religious records; and DNA tests.

3.3 Librarians should show patrons how to search bibliographies, library catalogs, local files, online resources, and genealogical/biographical indexes to learn if ancestors are included in published or manuscript resources at libraries and genealogical research centers.

3.4 Librarians should demonstrate how to organize collected data using standard genealogy pedigree and family group forms, or computer genealogy programs.

3.5 Librarians should help locate primary sources to learn names of ancestors and pinpoint events in their lives.

3.6 Librarians should explain how to document research using accepted rules of evidence and ethical research practices.

3.7 Librarians should encourage researchers to share research results through publication or donation of collected data to local libraries or research centers.

4.0 Orientation and education of patrons, including library programming and marketing

4.1 Librarians should accommodate genealogical researchers' varying goals, motivations, and experience levels by providing appropriate orientation and instruction on the research process and locally available resources.

4.2 Librarians should know how to produce and use instructional materials for genealogical research, such as handouts, web-based guides, and online tutorials.

4.3 Librarians should provide programming about genealogical research.

4.4 Librarians should identify and use all venues or channels willing to share information about programming including library locations, local partners, potential groups of researchers, social and print media marketing, library association and genealogical society calendars, etc., including venues and channels for outreach beyond the genealogical community.

5.0 The genealogical reference interview

5.1 The genealogical reference interview may be an ongoing information exchange between librarian and patron. One answer may lead to a host of other queries. The interview should elicit the following: the patron's research goal; target individuals'/families' names and their chronological, geographical, and socioeconomic contexts; how the patron learned what is known; and the patron's specific questions about the individuals/families being researched. If the patron cannot supply some of this information, then the librarian should try to help the patron to discover it and establish a feasible research plan.

5.2 As a result of the reference interview, the librarian should be able to guide the patron to the formulation of a focused research question, which will allow the librarian to determine the types of information needed by the patron to address the research questions and the types of sources that are most likely to provide that information, whether those sources are in the home institution or elsewhere.

6.0 Genealogy collection management

6.1 Genealogical collections are covered in more detail in other guidelines available from the Reference and User Services Association, including “RUSA Guidelines for Establishing, Developing, and Maintaining Genealogy and Local History Collections.”

6.2 Genealogical reference services may be provided even without a local collection on-site; therefore, training for use of databases and online collections should be considered a part of the librarian’s purview.

7.0 Genealogical research and lookup services

Genealogy reference services often involve extensive conversations with patrons as well as requests for name searches and other lookups across multiple resources. Librarians engaging in genealogical research and lookup services should defer to their library’s policies on how much time should be spent on these inquiries, and if in-depth research consultations are an approved public service.

7.1 The library should provide basic research and lookup services to patrons, including use of interlibrary loan, when needed.

7.2 These services may be provided face-to-face, via phone, email, or by other timely methods.

7.3 The library may apply an appropriate fee schedule to recover printing and postage costs.

7.4 The library should provide clear, written policies that explain and offer services, including the scope of the services, the maximum amount of staff effort allowed, and any fees. These policies should be publicized on the library’s website and by any other appropriate means.

7.5 In instances where the library cannot provide assistance on specific topics or questions, the library should inform the patron of viable alternatives such as online databases, webinars, wikis, volunteers, genealogical societies, and professional researchers.

8.0 Referrals to other repositories, online resources, and professional genealogists

Genealogical research assistance often requires librarians to make referrals to institutions, organizations, companies, and other resources, for patron informational, instructional, or educational needs that the library’s collections and services cannot meet.

Librarians should be familiar with the following types of institutions, repositories, organizations, and services in order to provide proper referrals:

8.1 Other libraries, including nearby public, academic, and special libraries.

8.2 FamilySearch centers and FamilySearch affiliate libraries.

8.3 Local, state, regional, and national archives.

8.4 Local, county, state, and national records offices.

8.5 Local, state, and national genealogical/historical societies.

8.6 Funeral home and cemetery offices.

8.7 Religious institutions.

8.8 Websites offering genealogy directories, mailing lists, message boards, blogs, and podcasts.

8.9 Companies and organizations offering local or online educational services.

8.10 Companies and organizations offering genealogy software, magazines, books, database subscriptions, and other products.

8.11 Directories of professional genealogists, such as the Association of Professional Genealogists and the Board of Certified Genealogists.

9.0 Working with volunteers

Librarians should be familiar with their library's policy on the use of volunteers to supplement the regular library staff. Work with volunteers should adhere to best practices, including attention to legal, ethical, and other concerns. Current information on use of volunteers advocated by the American Library Association, the American Association for State and Local History, the Society of American Archivists, and other relevant professional organizations is recommended in the drafting of volunteer policies.

10.0 Working collaboratively with local genealogical and historical societies

Librarians should work with staff and volunteers at other institutions in order to maximize access to genealogical resources, both physical and digital, and services. This includes a variety of public and private institutions such as archives, museums, historical and genealogical societies, etc. Collaborative work could include digitization projects, programming, social media content creation, descriptive work for collections, indexing, reference, and resource sharing.

11.0 Ethical and legal issues

Librarians should be familiar with the ethical standards of both librarianship and genealogical research, especially as outlined by professional library and genealogy organizations. Librarians should be aware of any local, state, or federal laws that apply to genealogical research and publishing, especially relating to the issues of records access, privacy, and copyright. Awareness of ethical and legal issues for genealogical research should also extend to genetic genealogy.

12.0 Professional development of genealogical librarians

As with all other areas of librarianship, genealogy librarians are expected to maintain a course of professional development throughout their career. They are encouraged to:

12.1 Keep their knowledge of available resources current and stay abreast of new developments surrounding access and availability of materials and services pertinent to genealogical research.

12.2 Stay informed about developments and trends related to the genealogical community and librarianship and their impact.

12.3 Be familiar with document analysis, bibliographic research, paleography, visual and information literacy, and genealogy-specific methodologies and guidelines, such as the Genealogical Proof Standard.

12.4 Be cognizant of best practices relating to archival management, both print and digital.

Further Reading:

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- Society of American Archivists. "Best Practices for Volunteers in Archives." Last updated September 20, 2014. <https://www2.archivists.org/standards/best-practices-for-volunteers-in-archives>.