

PO Box 4273, Hartford CT 06147-4273 E - Mail : cpgc@aol.com  
Web Page: <http://www.ancestry.com/societyhall/pages/sochall-732/main.htm>

## JUNE 1999 - NEWS & MINUTES

*Dianne B. Lenti, Secretary / Editor*

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**WE ARE OPEN TO ALL THOSE WHO PROVIDE GENEALOGY FOR OTHERS OR MANAGE COLLECTIONS OF RECORDS**

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### CPGC MINUTES - THURSDAY, JUNE 3, 1999

**Attending:** Barbara Mathews, Dianne Lenti, Thomas Howard, Virginia Howard, Betsy Butts, Donna Siemiatkoski, Fred Hart, Jack Kuras, Jean Perreault, Kathryn Black, Harlan Jessup, Rob Rafford, Priscilla Chatfield, Susan Field, Dick Roberts, Michael Castroll, Helen Ullmann.

**MEETING** called to order at 10:00 a.m. by Acting Vice President Barbara Mathews.

**Secretary's report** of May 6, 1999 was read and accepted with correction. (1) Rob Rafford (2) Jack Kuras.

**Treasurer's report** was read and placed on file for audit with a balance of \$1805.23. Note: \$900.00 has been received from the New England Regional Genealogy Conference held Oct 1998 at Portland, Maine.

**Correspondence:** General mail plus incoming queries. No further discussion.

#### **Government Relations (Donna Siemiatkoski):**

We are looking forward to the General Assembly approving budget increases that might allow the Connecticut State Library to have expanded evening and Saturday hours and the State Archives to be able to have a conservation lab. Legislators are currently discussing the ongoing library and archival space crisis. The bill to fund archival records preservation looks like it will pass successfully, although there is some opposition by a few House members. The bill to open adoption records before 1977, as interpreted by the Hartford Probate Court, also looks like it will pass.

#### **Connecticut State Library Report (Richard Roberts, Head, History & Genealogy Unit):**

There are budget concerns, particularly with regard to purchase of new books. An 8-9% inflation rate was built into the proposed budget for the law library, but zero percent was built in for the History & Genealogy Unit, therefore making any foreseeable purchase of books at risk for the coming year. The library continues to offer ongoing, progressive opportunities for research of Connecticut records and those of other states. [Note: Mr. Roberts has made significant changes, upgrading the library catalog, equipment and research materials; obtaining additional books, microfilm and CDs to enhance the growing library collection. His progressive thinking has made this library very user friendly and a pleasure to conduct research in. dbi]

#### **Membership (Robert Rafford):**

Currently 60 members; 58 paid, 2 life. Dianne Lenti agreed to send out letters to prospective members.

#### **Nominating Committee:** (Tom Howard, Rob Storm, Donna Siemiatkoski)

Requests that members submit nominations or suggest someone who may be willing to hold an office.

#### **OLD BUSINESS:**

**Brochures:** It was agreed that more time was needed to edit, print and assemble a new member list. Barbara Mathews is coordinating member listing changes, forwarding copies to Rob Rafford and Dianne Lenti. Rob agreed to edit and print the new list in time for the July 18<sup>th</sup> picnic, where they can be assembled with the brochures.

**Web Page:** Barbara Mathews is looking into other options for placement of CPGC's web page. The current address is not always accessible and not easily changed, thus making it undesirable for us to remain at that site.

#### **NEW BUSINESS:**

**FGS Conference, St. Louis:** At Donna Siemiatkoski's suggestion, it was agreed that the President have the authority to appoint someone as delegate for the FSG meeting at the upcoming conference in St. Louis.

**NERGC Luncheon Speaker:** Dianne Lenti moved that CPGC request Nancy Doane (subject: AGBI) as the speaker for the CPGC sponsored luncheon, 2000 Conference, Providence, RI. Seconded by Mike Castroll. Motion carried.

**July / August Meetings:** Members agreed not to hold meetings over the summer months.

**Meeting Adjourned:** 11:00 a.m.

*Dianne B. Lenti, Recording Secretary*

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## S C H E D U L E D M E E T I N G S

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**July 18, 1999 – Picnic – 12-3 p.m.,** at Raffords, 57 Clear View Knoll, Middlebury, CT (RSVP 860-758-9798)

**August 11-14, 1999 - FGS Conference,** St. Louis, Missouri.

**September 9, 1999 – CPGC Meeting,** 10 a.m. Beardsley & Memorial Library, 40 Munro Place, Winsted, CT

**October 7, 1999 – CPGC Meeting,** 10 a.m. Subject and place to be announced.

**November 4, 1999 – CPGC Meeting,** 10 a.m. Annual Meeting, Polish National Home, Hartford, CT

**May 31- June 3, 2000, NGS Conference,** *Bridge to America*, host NERGC, Providence RI

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□ **LEGISLATIVE UPDATE – Both bills (adoption and archival record preservation) failed in the final hours of Connecticut's current legislative session. Our CPGC President, Warren Buchanan, has wheels in motion for the archival preservation bill to be presented next year.**

◆ **CPGC PICNIC – SUNDAY - JULY 18, 1999 - 12-3 p.m. - HOT DOGS - HAMBURGERS - SODA**  
**R S V P - (203) 758 -9798, e-mail: robraff@snet.net. Bring "potluck" to share; fruit, vegs, salad, snacks, etc.**

⇒ **DIRECTIONS to Robert Rafford home at 57 Clear View Knoll, Middlebury, CT**

**From Hartford, Take I-84 West** through Waterbury to exit 17. Proceed straight on Rt. 64, through two stoplights. About ½ mile [Tzepos Law Office], take right onto Clear View Knoll. House is fifth, and last, on left. Park where convenient.

**From Danbury, take I-84 east** to exit 17. Go left onto Rt. 63, proceed to the first stop light (intersection Rt. 63 & 64), take left onto Rt. 64, proceed straight through light, approx. ½ mile to Clear View Knoll [Tzepos Law Office on corner]. House 5<sup>th</sup>, & last, on left.

**From Woodbury on route 64,** pass the Middlebury Post Office (1 m. from Raffords house), pass Johnnie's Dairy Bar and three gas stations. Clear View Knoll is on the left a few feet after the Mobil Station. Go to end of Clear View Knoll, house is 5<sup>th</sup> & last, on left.

**From the north: Take route 8 south** to I-84 west to exit 17. Follow directions (above) "From Hartford...."

**From Rt. 63 [heading south],** take a right onto Rt. 64 toward Woodbury. Proceed through next light, continuing for about another ½ mile [Tzepos Law Office on corner], to Clear View Knoll on right. House is fifth, and last, on left.

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**September 9, 1999 Meeting, 10 a.m. - Beardsley & Memorial Library, 40 Munro Place, Winsted, CT**

**DIRECTIONS (Phone: (860) 379-6043):**

**Route 8 North to the end of the expressway.** At traffic light turn right on route 44 west, continue to 6th traffic light, turn right onto Munro Place; first right is parking lot

**Route 8 South to traffic light at Park Pl. and Main St.(Rte 44 west),** turn right, continue to 4th traffic light, turn right onto Munro Place; first right is parking lot

**Route 44 West [from Hartford]** to intersection of Route 8 South. **Continue west on Rt. 44** to 7th traffic light, turn right onto Munro Place, first right is parking lot

PREPARED AND PRESENTED BY MEMBER THOMAS HOWARD ON JUNE 3, 1999

CONNECTICUT PROFESSIONAL GENEALOGISTS COUNCIL

PRESENTATION ON

## CONTRACTS

### **DEFINITIONS:**

WEBSTER DICTIONARY DEFINES A CONTRACT AS:

- 1) A **BINDING AGREEMENT** BETWEEN TWO OR MORE PERSONS OR PARTIES;
- 2) A **WRITING** MADE BY THE PARTIES TO EVIDENCE THE **TERMS AND CONDITIONS** OF A CONTRACT;
- 3) AN AGREEMENT ENFORCEABLE BY **LAW**.

### **WHY HAVE A WRITTEN CONTRACT?**

- 1) REDUCES OR ELIMINATES MISUNDERSTANDINGS WITH CLIENTS.
- 2) LAYS OUT THE GROUND RULES UNDER WHICH YOU WILL PROVIDE PROFESSIONAL SERVICES...AND HOW YOU WILL BE PAID FOR THEM.
- 3) ALLOWS A REASSURING BASIS FOR BOTH CLIENT AND PROFESSIONAL GENEALOGIST WHO MAY BE STRANGERS.

### **WHAT SHOULD A CONTRACT CONTAIN?**

- 1) GOALS OR OBJECTIVES IN SPECIFIC AND MEASURABLE TERMS.
- 2) COST PERAMETERS IN TERMS OF A PROFESSIONAL FEE OR HOURLY RATE, NUMBER OF HOURS AND COSTS THAT MAY BE EXPECTED (COPIES, MILEAGE, PARKING, POSTAGE, PHONE ETC). OUTLINES PAYMENT SCHEDULE: DEPOSIT, INTERIM AND FINAL PAYMENTS.
- 3) TIME FRAME WITHIN WHICH THE WORK IS TO BE DONE AND PAYMENTS MADE.
- 4) NATURE OF THE PRODUCT OF THE RESEARCH, THAT IS, THE REPORT TO BE GIVEN TO THE CLIENT (COPIES OF DOCUMENTS, PED.CHART ETC.)AND HOW IT WILL BE DELIVERED (MAIL, FAX, E MAIL).
- 5) FULL NAMES, ADDRESSES AND PHONE NUMBERS OF ALL PARTIES.
- 6) DISCLAIMER ... "I CANNOT BE RESPONSIBLE FOR THE INFORMATION THAT IS NOT FOUND ... OR REPOSITORIES THAT DO NOT RESPOND IN A TIMELY MANNER ..ONLY A GOOD FAITH EFFORT WILL BE MADE TO SEARCH STANDARD GEN. SOURCES".

## CONNECTICUT PROFESSIONAL GENEALOGISTS COUNCIL

### CONTRACTS ... part two

The following items were generated from several articles that were part of the APG Professional Management Seminar - August 19, 1998 - in Cincinnati, Ohio. These were provided by Robert Rafford. The specific sources included a) "excerpts from a written agreement with a law firm" b) a contract suggested by Eileen Polakoff, a NY Professional Genealogist and c) an adaptation of a example from a book by Elizabeth S. Mills entitled Professional Genealogy: A Manual ...

- 8) Two signed copies of the Agreement.
- 9) Confidentiality.
- 10) Right of the Genealogist to use the material for publication.
- 11) Pre-conditions related to the client providing the Genealogist with ALL the material the Client has including prior reports, copies of documents, notes on resources or repositories already visited etc...
- 12) Genealogist working as an independent contractor but working under professional standards including a Code Of Ethics...
- 13) Consent of the Client before report can be shared with others who might request it of the genealogist.
- 14) Consent of the Genealogist if the number of copies the client makes goes beyond reasonable and borders on publication. ... conditions ... credits and use of author's 'qualifiers'.
- 15) Dispute arbitration provision agreeing to use a Genealogical organization as the final arbitrator ... decision will be final and binding on both Client and Genealogist.

#### CONCLUSION:

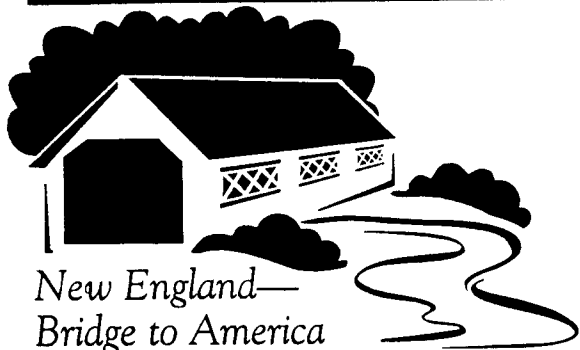
THE CONTRACT MUST PROVIDE A COMFORTABLE FIT FOR BOTH PARTIES TO THE TRANSACTION. IT MUST NOT BE TOO ABSTRACT, TOO PHILOSOPHICAL, TOO "LEGALISTIC", NOR TOO SIMPLE AND LACKING IN DETAILS.

WE LEARN BY TRIAL AND ERROR AND PICKING AND CHOOSING FROM THE EXAMPLES OF OTHERS. BY EXAMINING THE ACTUAL AGREEMENTS USED BY PROFESSIONAL GENEALOGISTS IN CPGC (WHICH WE HAVE PROVIDED IN THE PACKETS) YOU MAY HAVE 'THE STUFF' NECESSARY TO SHAPE OR RE-SHAPE YOUR OWN PROFESSIONAL AGREEMENT/CONTRACT.

Tom Howard

# National Genealogical Society 2000 Conference in the States

**NGS Conference in the States**



New England—  
Bridge to America

**PROVIDENCE • RHODE ISLAND**

31 May - 3 June 2000

Local Host

New England Regional  
Genealogical Conference

31 May–3 June 2000

Providence, Rhode Island

**Join** with NGS as the 2000 Conference in the States comes to New England, where from the rocky headlands of Maine to the sandy shores of Rhode Island, nearly four centuries of adventurous immigrants have landed—their Bridge to America.

**Find** that the New England states offer the most comprehensive and well preserved collections of public records in the nation—the town meeting form of government encouraged record keeping.

**Learn** that regional and local history record repositories are not only accessible; but that information on immigrant groups—origins, settlement, and migration—abounds.

**Expect** basic fundamentals, advanced methods, professional topics, genealogical and family history writing, computer-assisted genealogical topics, genetics and family health history.

**Relish** witchcraft, passenger arrivals, naturalizations, state census records, tax lists, early handwriting, gravestone inscriptions, mill workers, shipping, whaling, as potential subjects.

**Enjoy** the vast array of genealogical goods and services which will be presented by exhibitors.

**Plan** to attend the meeting and the many places you have been awaiting the perfect opportunity to visit.

**Yes! I want to receive the NGS 2000 Conference Brochure as soon as it is available.**

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_

The NGS 2000 Conference in the States will be on our web site beginning in November 1999. You may register for the conference and join NGS online.

- Nonmember  
 I want to become an NGS member

Mail to: NGS 2000 Conference Brochure, 4527 17th Street North, Arlington, VA 22207-2399

Phone: (703) 525-0050 Toll Free: (800) 473-0060 Fax: (703) 525-0052

E-mail: [conference@ngsgenealogy.org](mailto:conference@ngsgenealogy.org) Web site: [www.ngsgenealogy.org](http://www.ngsgenealogy.org)

NOTICE

SUMMER PICNIC

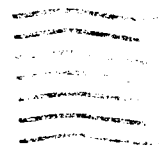
HOT DOGS & HAMBURGERS PROVIDED  
BRING AN ITEM TO SHARE (APPETIZER, SALAD, FRUIT, CASSEROLE, ETC.)

SUNDAY, JULY 18, 1999 - 12-3P.M.

Hosted by Dr. & Mrs. Robert Rafford at their home  
57 Clear View Knoll, Middlebury, CT 06762  
RSVP - Phone: (203) 758-9798  
(Details & directions inside)

**NO MEETINGS JULY AND AUGUST**

**NEXT SCHEDULED MEETING**  
**THURSDAY, SEPTEMBER 9, 1999, 10 A.M.**  
**BEARDSLEY & MEMORIAL LIBRARY, WINSTED CT**  
(Details & directions inside)



**FROM:**  
Connecticut Professional Genealogists Council  
P. O. Box 4273  
Hartford CT 06147-4273

**PICNIC**  
**JULY 18TH**  
**See you there !**

10-99

Barbara J. Mathews CG  
18 Blossom Street  
Lexington MA 02173-8110

**NEXT MEETING**  
**Thursday - 10:00 A.M.**  
**September 9, 1999**  
**Beardsley & Memorial Library**  
**40 Munro Place**  
**Winsted, Connecticut**

