

## **Clermont Family History Center Staff Guidelines** 9 Sep 2008

### **What Is a Family History Center?**

A Family History Center is typically a room in a meetinghouse where Church members and community patrons are welcome and have access to Church family history resources.

Family History Centers are effective to the extent that:

1. All patrons feel welcome to use the resources.
2. Members and community patrons are identifying their ancestors.
3. Members are providing temple ordinances for their ancestors.
4. While following rules of confidentiality of living individuals, all patrons are sharing the information they compile with the rest of the family history community and coordinating their family history research effort with others.

### **Priesthood support**

A high council adviser for temple and family history work, under the direction of the stake presidency, oversees the family history centers in the stake.

### **Operating Funds**

All Family History Center operating funds must be allocated by the Church unit(s) that support the center. Family History Centers may not generate their own operating funds. Centers may sell at cost Church publications, forms, and supplies obtained from the Salt Lake Distribution Center. Centers may not sell non-Church publications, materials, software, or products.

### **Family History Center Staff**

Staff members are called by the bishopric from the Church unit(s) the center serves. They serve on a volunteer basis or as part of a calling and are not compensated for their service. Family History Center staff may include community patrons (nonmembers), if approved by the bishopric. At least two staff members, one of whom must be a Church member, must be present when the center is open. In cases when a male staff member and a female staff member who are not married to each other are assigned to the same shift, a third staff member must be present.

Since the primary purpose of the Center is to help members identify their ancestors and provide temple ordinances for them, a call to serve in the Family History Center should be regarded with the same respect and commitment as a call to serve in the temple.

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You can find the FH Center Operations Guide on the top bookcase shelf at the center or on-line on the Internet at: <http://www.familysearch.org/eng/library/fhcdirector/>

Family History consultants should register for on-line training at <https://lds.netdimensions.com/index.html> by registering at <https://consultant.familysearch.org/consultant/start.do>

Resource material is available at [https://help.familysearch.org/kb/Local\\_Support/en/Consultants/memos/consultantmemos.htm](https://help.familysearch.org/kb/Local_Support/en/Consultants/memos/consultantmemos.htm)

The "Operations Guide" offers the following suggestions:

### **Required Staff Skills**

Staff are not expected to be expert genealogists. If they assist patrons, they should be trained to:

1. Understand the basic principles and steps of family history research.
2. Use the basic resources, publications, and equipment in the center.
3. Help patrons in these basic tasks and make them feel welcome.

The *Helping Patrons—Quick Reference Guide* in section 4 states Family History Center staff should:

Step 1: Help Patrons Feel Welcome

Step 2: Assess Patrons' Needs

Step 3: Help Patrons As Needed to Select and Use Resources

A. Using Church Resources and Publications

B. Helping with the Research Process [See chart on page 14.]

C. Obtaining Help from the Family History Library

D. Recommending Other Sources Available in the Community

Step 4: Encourage Patrons to Continue to Search for Their Ancestors and to Share with Others.

### **Helping Patrons**

Step 1: **Help Patrons Feel Welcome.** Greet patrons, giving them your full attention and letting them know you are there to serve them.

Step 2: **Assess Patrons' Needs.** Because every patron will have a particular reason for coming to the center, you should make every effort to identify his or her specific need. Ask questions and listen to determine how you can best help.

**Questioning.** Start with open-ended questions. For example, you could ask: How can I help you today? What information have you brought with you? What can you remember about your grandfather? Then use close-ended questions to narrow down or clarify patrons' needs. Examples are: "What is your mother's maiden name? Do you know how to use the library catalog? What year did your grandfather die?"

**Listening.** Listen carefully to patrons' responses. This will enable you to hear not only what another person is saying but also what he or she is feeling. When you listen, express interest by being attentive.

Step 3: Help Patrons As Needed to **Select and Use Resources.**

A. Using Church Research Aids and the Family History Publications List.

B. Helping with **the Research Process.** All patrons doing family history research do not start at the same point in the five-step process. Since some have accomplished more than others, first find out what patrons have done, then determine what they need to do. [Consult the chart on page 14.]

C. **Obtaining Help** from the Family History Library. Staff at the Family History Library can answer brief reference questions. They cannot do research for patrons. For questions they cannot answer, center staff may call the Family History Library at the toll-free number on page 3 of the operations guide. Note: For questions about FamilySearch, Personal Ancestral File, or non-research questions, center staff may call Family History Support at 866-406-1830.

D. Recommending **Other Sources** Available in the Community. The center staff can recommend local libraries, archives, and societies that have genealogical and historical information. They should take note of:

1. Major research collections and resources, including guidebooks, "how-to" books, and reference tools.

2. Services offered in the community. When the center cannot meet patrons' needs, staff should refer them to the appropriate organization, where possible.

Step 4: **Encourage** Patrons to Continue to Search for Their Ancestors and to Share with Others.

**Summarize** what you have helped patrons think about or find. **Discuss the next thing they need to do** to continue their research. Help them go away with a feeling of success.

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The on-line training offers very specific things the staff could do to help the patron. Discussion of the topics listed in these pages will sharpen necessary skill.

### **Operating Procedures for the Clermont Family History Center:**

#### **Opening:**

1. Keep the outside door at the end of the hall (back entry of the building) locked for security reasons. There is an outside bell allowing staff to permit patron entry into the facility.
2. Unlock and prop open the center door.
3. Turn on the A/C control for the center.
4. Plug in the main plug for the computers and turn on the plug switch.
5. Turn on the computers. Monitors and printers should go on when the plug switch is turned on.
6. Unlock all file cabinets.
7. Count the money and fill out the shift financial transaction form beginning amount.

SIGN THE LOG-IN book and ask the patron to sign in and sign out, to record financial transactions, and to record the number of names they cleared using TempleReady.

#### **Ordering microfilms & microfiche:**

1. Place the number on the order form found on top of the left file cabinet.
2. Verify the number using the FHC library catalog on the computer.
3. Put the patron's name and full address and phone number on the order form. Ask the patron if they have an e-mail address. If so, put it on the form and explain that notification of film arrival will be by e-mail.
4. Charge \$5.50 for each film.
5. Fiche are \$.15 each, will be sent on indefinite loan and will be kept in the center.
6. Since orders are placed by computer modem contact the director who will place the order.
7. Generally, orders arrive in about two weeks but back orders take longer. The patron has one month from arrival to view the film.

Minolta fiche/film copier: We no longer have a this fiche/film printer. We advise patrons to bring a digital camera to make copies images from the film or fiche they order.

#### **Storage of film and fiche:**

1. The third drawer from the bottom of the film cabinet is for temporary films. In the rest of the cabinet, extended loan film boxes and fiche envelopes should be kept in numerical order. Staff should refile used material to ensure it is put in place.
2. When patrons use a fiche, ask that they use a colored paper to mark the place where they remove it from so that staff can identify that location when returning the fiche in the cabinet.

**Ending the shift and closing the center:**

1. Make sure all films and fiche have been returned to the cabinet.
2. Count the money and enter the totals on the shift financial transaction form and sign the form.
3. Lock all three cabinets.
4. Shut down the computers and then turn off the switch and unplug the line.
5. Turn off the lights and close and lock the door.

If weather conditions are dangerous, close the center and advise people to stay home and off the roads.

- All staff members and patrons must keep Church standards in the building and on the Church grounds.
- FHC keys are signed out by staff and not lent to others. No one is to be in the center unless a staff member is present.
- Copying of materials should follow copyright laws and Church rules. Read page 39 of the operations guide. Guidelines are also posted on the bulletin board in the center. The church unit Xerox machine is available for family history material only at \$.05 a copy. Notation of money collected from using the Xerox machine is recorded separately from other money collected in the center.
- In instances where a staff member can not cover their shift, try to arrange for another staff person to cover for them and please notify the director that you won't be covering that shift.

Please use the handouts on the bookcase shelf listing the many resources provided by the center.

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What should we be able to do if we are going to assist a patron or a Church member in the center?

Know:

1. How to load a microfilm onto the reader.
2. How to find the number of a microfilm in the Family History Library catalog.
3. How to use the Family History Library catalog.
4. How to help a patron "Restore" a backup file from their floppy disk to the center's computer.
5. How to backup a patron's database to their floppy disk or to a flash card.
6. How to do a family's data entry into PAF5. (Understand and encourage members to follow the guidelines in "*GENERAL STANDARDS for Preparing & Submitting Names to the Temple*".)
7. How to search for someone in FamilySearch.org.
8. How to prepare and process an ancestor's name using TempleReady software following the guidelines in "*Submitting Names for Temple Ordinances using PAF, the IIGI and TempleReady*."
9. How to explain the information in the printed research guides and "*A Guide to Research*."
10. How to use the research guides on FamilySearch.org.
11. How to use the Pedigree Resource files. Explain the difference between PRF data on FamilySearch.org and that found on the CDs.
12. How to create GEDCOM files and how to explain their purpose.
13. How to match/merge GEDCOM file imports into a personal database.
14. How to use the resources listed on the Clermont FHC resources handout and prepare to teach some of the listed classes.

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LDS lessons: <http://lessons.tmason1.com/>