



# Code of Ethics and Professional Practices

## **Purpose:**

The Ancestry & Heritage Investigation Josef Langenburg (AHIJL)

Code of Ethics and Professional Practices serves to promote: (1) a truthful approach to genealogy, family history, and local history; (2) the trust and security of genealogical consumers; and (3) careful and respectful treatment of records, repositories and their staffs, other professionals, and genealogical organizations and associations.

Consistent with these purposes, We agree to:

1. Present research results and opinions in a clear, well-organized manner;
2. Refrain from withholding, suppressing, or knowingly misquoting or misinterpreting sources or data;
3. Report appropriately qualified genealogical conclusions in writing based on the weight of the evidence with fully and accurately cited sources;
4. Represent my abilities, services, and credentials honestly, avoiding the use of misleading or exaggerated statements;
5. Engage in sufficient continuing education to maintain competence and comply with applicable requirements;
6. Prepare and abide by written agreements regarding applicable project scope, fees, charges, payment structures, and deliverables without concealment or misrepresentation;
7. Disclose potential conflicts of interest;
8. Maintain confidentiality of client communications and research, except as permitted in writing by the client or required by court or professional disciplinary proceedings;
9. Treat information concerning living people with appropriate discretion;
10. Refrain from violating or encouraging others to violate laws or regulations concerning copyright, rights to privacy, business practices, or other pertinent subjects;
11. Refrain from mutilating, rearranging, or removing from their proper custodians printed, original, microfilmed, or electronic records;
12. Give proper credit to the work of others and refrain from plagiarism;
13. Refrain from soliciting established clients of another researcher through denigration, violation of laws or regulations, or other improper means;
14. Refrain from behaviors or statements that malign or are maliciously calculated to injure the profession; individual genealogists; genealogical associations, programs, or educational organizations; or the Association of Professional Genealogists.

## **Why the Code?**

The AHIJL has a responsibility to serve the genealogical client community.

The significance of ethics to AHIJL and its employees is reflected in the manner in which complaints are processed and resolved.

When a violation of this Code is alleged, it will be reviewed and investigated if AHIJL's Professional Review Committee determines it meets criteria for such action.

The complaint and disciplinary procedures accomplish five things:

- Maintain a high professional standard
- Increase consumer confidence
- Provide a fair process for handling of complaints against employees
- Identify employees who will benefit from additional professional development
- Identify those committing serious violations of the Code of Ethics

## **Who can file a complaint?**

- Clients who believe an AHIJL employee has not performed as expected or has failed to complete a genealogical service (research report, seminar, etc.). The individual must have been an employee of AHIJL at the time the agreement was made. A client is any individual who has an agreement in writing (e.g. letters, emails, or formal contracts) with AHIJL.

## **What we won't review**

- Allegations concerning verbal agreements between an employee and another party. There must be something in writing (contract, email, etc.) that demonstrates the scope of the agreement.
- Allegations against an employee for non-genealogical business agreements such as non-payment of rents or other general business not directly related to genealogical business.
- Allegations of a personal nature not related to genealogical activity.
- Allegations of activity that occurred more than 12 months prior to the date of the complaint. The last contact between the two sides to the complaint should be no more than twelve (12) months prior to the complaint filing date.
- Allegations against an individual based solely on his/her position in a corporation unless the complainant can show that the alleged problem is directly attributable to the action of the employee.

## **If you believe an AHIJL employee has violated this code**

- Contact the office of AHIJL by submitting an E-Mail online. You will then receive instructions for submitting evidence in support of your claim, including copies of written agreements, records of payment, emails or other correspondence, and any other items that will help the Professional Review Committee (PRC) understand your complaint against the employee.
- The director will convey the materials to the PRC who will determine whether the matter meets the criteria required for a review.
- The director will advise the complainant whether or not the PRC accepts the issue for formal review. At this point the employee will be advised of your complaint and will be asked to respond through the director to the PRC.

## **What to Expect**

The investigation may

- Come down in favor of the complainant and may include disciplinary action and/or how the employee can rectify the situation.
- Come down in favor of the employee and set out why the complaint will not be upheld.
- Reach no conclusion due to lack of concrete evidence or other extenuating circumstances.

## **Confidentiality**

- All complaints brought to the AHIJL Professional Review Committee are considered confidential. All parties (complainant, employee, and AHIJL's PRC and Executive Committee) are expected to not disclose any details of this complaint or its outcome with anyone other than through AHIJL's Executive Director.