



## GUILD MEMBERSHIP & REGISTRATION OF A SURNAME STUDY

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## **A Introduction**

1. The Guild's Constitution describes, in Sections 10 & 31, the requirements for membership, the rights of members, how applications for membership are processed and how applications for registration of a surname study are made.
2. This document is made under Section 27 of the Constitution. It defines the Rules and Procedures attached to membership of the Guild and the registration of a one-name study (see Section 31 of the Constitution).

## **B General Definitions**

1. The Constitution Section 4 defines a one-name study as “research into the genealogy and family history of all persons with the same surname and its variants, otherwise known as a ‘surname study’.”
2. Where the phrase 'the study' or 'the surname' is used in this document it includes both the registered surname and any variants noted within that member's one-name study registration.
3. A “Study Registrant” is the full member who has registered the Surname Study with the Guild (sometimes called the Study Owner).
4. A “Study Associate” is a full member that is accepted by the Study Registrant or the group of Study Partners to help with the study (see Section O).
5. A “Study Partner” is one of a group of full members who have registered a Cooperative Study (see Section P).

## **C General Statement**

1. The Guild has its roots back in 1979, promoting high-quality documentary research in a time before personal computers and before the internet era, but it positions itself today as a world-leading centre of excellence for in-depth studies of individual surnames and groups of surnames.
2. The Guild supports the development of one-name studies without mandating any particular approach or method, recognizing that the field has been transformed in recent years by the digitization of data, the proliferation of online

transcriptions, and the development of genealogical DNA test applications; and aware that the field is likely to be further transformed in the future by new technologies, online resources and opportunities as yet unidentified.

#### **D Data Protection**

- 1 Personal data pertaining to members will be handled by the Guild subject to the Data Protection Act 2018.

#### **E Membership**

1. The Constitution, in Clause 10 (1)(a) Eligibility, states that:

Membership of the Guild is open to any natural person who is interested in furthering its purposes.

Corporate bodies, organisations which are not incorporated, societies, institutions or groups may become (non-voting) associate members under Clause 10 (1)(a) of the Constitution.

#### **F Membership Conditions**

1. Section 10 (3) of the Constitution places the following responsibility on every member:

“It is the duty of each member of the Guild to exercise his or her powers as a member of the Guild in the way he or she decides in good faith would be most likely to further the objects of the Guild.”

2. Applications for membership shall be sent to the Membership Registrar via an online form on the Guild’s Website.
3. All members are required to pay an annual membership fee, except life, term and founder members. For all other members payment falls due on 1st November. The membership fee is set by the Trustees which may authorize discounts or special offers as it sees fit.
4. The Constitution notes in Section 10 (4)(a)(iii) that Membership of the Guild comes to an end if any sum of money owed by the member to the Guild is not paid in full within three months of its falling due.

5. Members who register a surname are required to respond to email and postal reply-paid queries relating to the surname study in a timely fashion.

Further guidance is given at <https://one-name.org/responding-to-enquiries/> (which is controlled by Guild Document 027).

6. Members should read the Guild's document "Code of Good Practice and Etiquette" (Guild Document 005) and endeavour to maintain the standards set out in this document.

## **G The Register**

1. The Guild publishes a Register of One-Name Studies as required under Section 31 (2) of the Constitution.
2. Members' contact details will be stored in the Guild's database(s) subject to conditions set by the Data Protection Act 2018.
3. Members with Surname Studies registered with the Guild will have their email alias published in the printed edition of the Register of One-Name Studies.
4. The means of searching the Register online within the public domain may display contact details differently to the printed version, as the Trustees see fit.

## **H Study Principles**

1. The formal obligation agreed by members when registering a surname with the Guild is simple - it is to respond to queries relating to the study in a timely manner.
2. It should be noted that the Guild places no obligation on those registering a name to follow any specific regime of research, or to concentrate on any specific aspect of their study. In particular, there are no time constraints or deadlines on members, who are free to conduct their one-name projects as they see best.
3. Members who register a surname as a Guild one-name study accept the following broad principles in relation to their registered one-name study:
  - that the member(s) will work towards a study that is global in scope

- that it includes research within countries where the name is relatively significant and where sources of genealogical data are readily available
  - that it researches and records data available in core genealogical datasets and transcriptions (for example Births, Deaths, Marriages and Census)
  - that it records and may research other data where the surname is mentioned (for example Probate Records, Newspapers, Military Records, etc.)
  - that the member will maintain an accurate description of the scope and progress of the study using Study Codes and Study Categories
4. Members with a registered study are expected to actively research their registered names, although it is accepted that there will be periods of little activity due to health and other personal circumstances.

## **I Study Categories**

1. Members who register a surname as a Guild one-name study should define the progress of their study according to three categories:

Category 1 A study where research of core genealogical datasets and transcriptions is in its early stages.

Category 2 A study where research of core genealogical datasets and transcriptions is well underway, but in some countries only.

Category 3 A study where research of core genealogical datasets and transcriptions is well underway on a global basis.

2. Members are asked to update their category status as their studies develop via the Guild Website.

## **J Registration of Surnames & Variants**

1. This section describes the registration of surnames as mandated by Section 31 of the Constitution.

For existing members, applications to register a Study Name shall be made to the Study Registrar using the online form on the Guild website.

For new members, concurrent Applications to register a Study

Name may be made to the Membership Registrar using the Guild website. The necessary information will be forwarded to the Study Registrar.

Note: Applicants must be accepted as a member before the registration of a surname can be confirmed.

Subject to any restrictions appearing in the Constitution or these Rules and Procedures, each registration will be accepted on completion of an undertaking to comply with such conditions as may be specified in the Constitution or contained within these Rules and Procedures and on payment of an initial and non-returnable Registration Fee.

Any given surname may be registered as a study or variant by a single Study Registrant or group of Study Partners on a 'first come, first served' basis'. The Study Registrar reserves the right to decline a registration and will decide on the process for de-registration and re-registration.

The Study Registrar may decline an application for registration if, after consulting with others as appropriate, it is deemed to be unsuitable.

When examining registration applications, the Study Registrar considers whether:

- The member is aware of the possible size of the study
- Variants proposed for the study are reasonable and derived from the main study name
- The study and/or its variants do not overlap with an existing study

Members are discouraged from registering more than three registered surnames (although it is strongly recommended that only one name is registered initially).

If the Registrar has any concerns about the registration application, the applicant will be consulted and changes suggested, for example to the names or variants proposed.

The registration of any surnames and variants shall lapse when membership ceases. Any individual re-joining the Guild and wishing to re-register any surnames and variants (if they are still available for registration) shall pay the appropriate Registration Fee, although the Registrar may waive the fee if this is deemed appropriate.

## K Variants

A member with a registered name may register a reasonable number of variants within each registered study. Where the number of variant surnames appears excessive, the Study Registrar has the discretion to reduce the number of variant surnames that are listed.

Members should only register true variants and not 'deviants' of a main surname. Where a name has a large number of variants, we recommend that members register the five or so that are most common in the first instance. Any variants registered must be actively studied in the same manner as the Registered Surname.

Members may request to add or remove a variant at any time by submitting the proposed change to the Study Registrar.

**Variant:** The Guild defines a variant as a name spelling which varies from the primary name spelling (or another variant spelling) which is either:

- A name spelling that the person was known to have used, through signature evidence on wills, marriage bonds etc., or other documents originating from the individual concerned
- A name spelling used by officials on a consistent and persistent basis over a period of years

**Deviant:** A 'deviant' is any other spelling recorded, including cases where the spelling occurs in official records, but only randomly and inconsistently. Deviants will also include spellings derived from enumeration, transcription and indexing errors, both contemporary and modern.

## L Study Profiles

Every Study Registrant or group of Study Partners is issued with a Study Webpage for the registered study name.

The Study Webpage will have minimum information about the Study. The registered Study Registrant may convert a Study Webpage to a Study Profile by submitting an application - the form for this is on the website and can be found by clicking on "Create Profile page" on your My Details webpage beside your Study Name. When the application has been accepted, the Study Profile will contain a number of additional sections which may be filled with free text and attached images.

Study Profiles are used to describe and promote a member's one-name study.

The Study Profile will be retained on the Guild website until a new Study Registrant or group of Study Partners is found, unless the registered Study Registrant has changed his/her profile bequest details to "deleted". If set to "deleted", the Study Profile will then be removed when the Study Registrant or Study Partners leave the Guild. A retained Study Profile will be transferred to a new member when he/she registers the surname.

Study Webpages and Study Profiles can be found by searching for a name in the surname search box near the top of the main Guild webpages. Study Webpages and Profiles are viewable by Guild members and by the public.

The Guild reserves the right to remove a Study Profile at any time where the Guild feels that the content is inappropriate or detrimental to the reputation of the Guild.

## **M Study Codes**

Study Codes are designed (a) to help enquirers understand what a registered study may be able to offer them, and (b) to provide information to the Guild about the scope of our collective activities. They are subject to change as decided by the Trustees.

The following Study Codes are defined:

- A** Study has an Archived Datastore which contains genealogical data and may be found by searching for the appropriate registered name on the Guild website
- B** Study has published a Book or e-book
- D** Study has an associated DN.A study for which the member is usually the project coordinator
- E** Study has an Email address
- F** Study has a Facebook page
- G** Study is available for adoption by another Guild member
- K** Study has nominated a genealogical next of Kin to take over the study
- L** Study has deposited materials in the Guild Library which are available to other Guild members
- N** Study produces a Newsletter, journal or blog
- O** Study has published Other material such as an article in a journal or magazine, a CD or DVD, etc
- P** Study has a Study Profile



- R This study has Reconstructed family trees for the surname to some level of completion, where (1) a few, (2) quite a lot, (3) a majority, (4) all or nearly all
- S Study is supported by a one-name Society
- W Study has a Web site whose URL should be found on the Study Profile

A date field on the member's registration page associated with the Study Codes indicates when the codes were last updated or confirmed by the member.

## **N Other Surname Interests**

Members may record an Other Surname Interest (OSI) for a name when the member does not wish to register the name as a study, or where there is an existing registered study for the name, and wishes to express an interest in it. The interest will be displayed on a search for the name on the Guild website.

## **O Study Associates.**

Study Associate is a formal method by which a Guild Member (the Study Registrant) can formally recognise the help and assistance of another Guild Member (the Study Associate) in support of their Study.

Study Associates were introduced to enable members to collaborate on a one-name study, thus making it easier for members to work together on large studies. This will be helpful where multiple people are collaborating on different aspects of research into a surname. It should also help where the member who has registered the name is no longer actively conducting research, allowing another person to provide new input. In addition, it will provide for continuity where the member who has registered the study leaves the Guild or decides they no longer want to be the formal owner.

The benefits to the member are:

- Study Registrants can clarify who does what within the Study, make this information available to the public and openly acknowledge the work that others are putting into the one-name study
- Members who might have wanted to register the study name themselves can be involved with the Study
- It formalizes and extends the collaboration process and enables Study Associates to feel “included” in the Study

- By making the study emails visible to Study Associates it removes an administrative step for the Study Registrant
- Members wishing to hand over their study at some future date can use the Study Associate system to introduce a successor to the entire study in a phased way

An overview of the process is given at: <https://one-name.org/roles-for-one-name-studies/>. You need to be logged into the web site to access this page.

## **P Cooperative Studies**

A Cooperative Study is a registered one-name study where all activities of the study are shared by Study Partners. There is no limit to the number of Study Partners in a Cooperative Study.

All Study Partners are to be equally responsible for fulfilling the requirements of a one-name study that the Guild has determined. One Study Partner shall be nominated to be the Guild contact for the study but this does not imply any special responsibility for this Study Partner.

Registration of a Cooperative Study will be done by the Study Registrar upon receipt of an application.

This will normally be by two or more members who wish to be Study Partners.

In addition, any member applying to register a Study can request that it be labelled as a Cooperative Study; however, until they have recruited Study Partners, the Study will be registered as a full Study and the member will accept the responsibilities of a Study Registrant.

Whenever there is a change to Study Partners, the Study Registrar shall be informed.

A Cooperative Study will remain registered until the last-named Study Partner has left the Study.

At any time the Study Partners may agree to convert the Cooperative Study to a regular registered study with one Study Partner becoming the Study Registrant and any other remaining Study Partners becoming Study Associates.

## **Q Subscriber Organisations**

1. Subscriber Organisations are NOT members and are merely subscribers to copies of the Guild Journal. They have no other Guild benefits and no voting rights.

Subscriber Organisations, typically libraries and family history societies, receive paper copies of the four quarterly Journals and the Guild's annual Register of One-Name Studies.

2. The cost of a Guild annual subscription for Subscribers is agreed by the Trustees and runs from 1st November to 31st October.
3. An application form is on the Guild website at: <https://one-name.org/product/subscriber/>.

## **R Membership Renewal**

1. Section 10 (5) of the Constitution allows the Trustees to set an annual Membership Subscription. Clauses 3 & 4 of Section F above apply.
2. The Guild's subscription year runs from 1st November through 31st October of the following year, with subscriptions due on 1st November each year. Reference should be made the webpage <https://one-name.org/renewals/> for information on current subscription rates.
3. Renewal payments may be paid online in six major currencies, using a credit or debit card or through PayPal. Alternatively, payments may be made by Direct Debit, Repeat Transaction Authority, or Direct Bank Transfer in various currencies. Payment by post (Cheque or Credit Card) is also acceptable. All these payment options are explained on the Renewals webpage referenced above.
4. Members may elect to purchase a 5-year or 10-year Term Membership, or a Life Membership for members approaching their 65th birthday or older - details and rates are given at <https://one-name.org/term-life-memberships/>. In the past, free Life Membership has been offered to all Founder Members (those with membership numbers below 200).
5. All members who pay UK income tax are encouraged to allow the Guild to reclaim tax on subscriptions and donations in the form of Gift Aid. The total benefit to the Guild can be quite considerable and instructions to members are available on the Renewals webpage including a declaration form.

## **S Financial Assistance for Membership**

Occasionally there are instances where members resign, and in some cases de-register their study, because personal situations prevent them, for a variety of reasons, from paying their renewal.

The Guild may offer financial assistance in these cases so that membership of the Guild can continue. It should be the very last resort that a request for Financial Assistance is made.

**Criteria:**

- A member has told the Guild that they cannot afford the subscription but otherwise wish to stay a member
- The member has been a Guild member for at least 5 years
- The member has registered a Study
- If either the 2nd or 3rd point above does not apply, has helped the Guild in some way (been a Trustee, been Regional Rep, been a Committee member, helped with projects, etc.)
- A maximum of five such applications may be awarded in any one year, and there is no requirement for an award to be made
- A member may be a recipient of the scheme for no more than three years in total.

**Process:**

- Application should be made via email to the Membership Registrar providing a summary before the 10th January each year. The Membership Registrar shall acknowledge receipt
- The consideration panel will be made up of the Membership Registrar, Renewals Secretary and Chairman
- The application and outcome of the panel will be confidential
- The decision of the panel shall be notified by the Chairman to the Trustees

**Outcome:**

- All members will receive notification of the outcome of their application by the Membership Registrar
- If an award is made, then this will only be for the “no printed Journal” option
- The decision of the consideration panel is final and there is no appeals process.

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