

Mentoring Agreement

Prepared for: _____ (write name)

This agreement sets out the working arrangement between *HoldenWorks* and the Client named above for genealogical research mentoring on the project the Client is pursuing.

How mentoring works. In a mentoring engagement, the Client conducts the research and *HoldenWorks* guides it. Sessions are held by Zoom and run approximately one hour, following a consistent structure: we review the work completed since the last session, correct course where needed, and assign the next task. This assign-and-assess pairing is the core of the engagement, and every session does both.

Scheduling. Sessions are scheduled as we go rather than as a fixed package. This work goes best on a roughly weekly rhythm, and we ask that sessions be scheduled no more than two weeks apart, as momentum and continuity suffer past that point. Between sessions, up to one brief email exchange per week is included for questions on the assigned task.

Fee. Each session is billed at a flat \$80. A session lasts approximately one hour; it may run somewhat longer or shorter depending on factors such as the Client's preparation, the time required for explanation and execution, and the complexity of the day's task. The fee remains the same in either case. A minimum of two sessions is required at sign-up, since a task must first be set and then reviewed for the engagement to do its work. Beyond that minimum, no fixed number of sessions is set in advance; the engagement continues, session by session, until we agree together on next steps. Payment is made per session by ACH transfer (Venmo or Zelle) to holdenworks@gmail.com; other arrangements can be made by email.

What HoldenWorks will and will not do. We will: help design the research project; identify the right records and repositories; teach sound method in accord with the Genealogical Proof Standard (GPS); help organize files and documentation to a professional standard; and advise on the ins-and-outs of Jewish genealogical practice. We do not: perform the research ourselves; independently verify the records the Client gathers; produce a written report or other research deliverable; and provide legal advice.

No guarantees. Genealogical research carries no guaranteed outcome. Results depend on the records that have survived and remain accessible and, in a mentoring engagement, on the Client's own execution of the work between sessions. The Client acknowledges this in entering the engagement.

Confidentiality. *HoldenWorks* treats the Client's family information and materials as confidential and will not share identifying information without the Client's consent.

Use of anonymized material. *HoldenWorks* may draw on anonymized, de-identified material from this engagement in its teaching, writing, blog and journal articles, podcasts, and portfolio, in a form that does not identify the Client or any living individual.

Agreement. By signing below, both parties agree to the arrangement described above. This agreement may be executed electronically.

Client

Date

For *HoldenWorks*

Date
