

WRITING A SUCCESSFUL LETTER OF INSTRUCTION

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On 18 February 2000, George Morgan's column was about "Selecting and Engaging a Professional Researcher." While reading it, I thought over my own experiences and decided that one of his items was worth an expanded discussion. He said "Written agreements should include, at a minimum, the following: . . . Clear description of the research work to be conducted and its scope (subjects, location, what information is desired, time period(s), and other specific details)."

Genealogists will have a better relationship with a professional if they devote careful attention to this item. The following ten tips offer suggestions for the research description:

1. Do your homework first. It will save both money and time.

Examine any available guides on research in the area, plus the Family History Library Catalog. If the records you need searched are microfilmed and available in Salt Lake City, you might choose a researcher there, especially if you need research from several counties. If the county records have been moved to a state or regional repository, you may prefer to use a researcher closer to the records. On the other hand, you may feel you need the local expertise, in which case you should inquire about how often the researcher visits the repository.

2. Organize what you've already got. The professional is going to want to know exactly what you have searched and what documents you have found. All too often professionals locate documents only to be told "Oh, I already had that." The client is unhappy and so is the professional.

As you organize your material so you can tell the professional about it, you may be surprised at what you do and do not have. An acquaintance asked if I could do some research for her on an out-of-state lineage. Because I knew she had done a lot of work on her own, I suggested that rather than send me copies, she write a report on her research, fully documented, and send that. A few days later I had a phone message saying there was a delay. She had discovered that for reasons unknown she had never tracked down her great-grandmother's marriage record, which might contain a clue. Since she would be in that county on family business, she would get it herself. A week later I had another message. She was overjoyed. The couple had never picked up the original license after it was recorded, and the clerk had given it to her.

3. If the problem is a difficult lineage, it might be wise to hire the professional for several hours initially to construct a research plan.

The research plan will help you see the scope of the problem so you can issue more informed instructions to the researcher. You may be able to identify some of the work that you can do yourself while the professional checks less accessible records.

4. Be cautious about telling the professional where to look. State the goal and ask for suggestions.

For example, suppose you suspect John Jones might have died between 1850 when he was on the census and 1860 when the entire family has vanished from the county. Do not instruct the professional to "search the wills between 1850 and 1860." Instead say, "My goal is to determine if he died in your county between 1850 and 1860. I know I need wills searched. What other kinds of probates are there for this time period? What other sources about deaths can be searched relatively efficiently?" This allows the professional to describe the sources, perhaps telling you that there are indexed death records for four years of that time period, or that the newspapers are microfilmed and can be rented for a nominal fee, but there is no obituary index, so you may want to search those yourself.

5. Be very cautious about telling the professional where *not* to look. You may be denying yourself the benefit of his or her expertise.

Describe precisely the records you have searched (record group and time period), but do not say "Do not look in this county" or "Do not look at land records." The professional will not look at records you have already examined (unless it is necessary to obtain additional information), but he or she may know of valuable record groups in the county that you did not search, or that mortgages were in a separate book from deeds, or that many deeds were rerecorded decades later, after a courthouse fire.

6. Do not send the kitchen sink.

Most professionals want to know what has been done and see key documents, but if you send everything, you will be billed for the time it takes to go through (and often to organize) the material.

7. Do send a duplicate of the most complete version you have of any document that states a relationship or seems important to the problem. If you have a photocopy of the handwritten original, send that, not an abstract.

The professional may read a word differently or realize the significance of a phrase that you thought was legal gobbledegook. I had a client who sent a typed abstract of the will of the person we were studying. There were several troublesome parts to it, so I asked for the will itself; the client sent the will-book copy. It was still troublesome. I realized from another reference that the original survived and inquired if the client had a copy. It arrived and I immediately deciphered the name of the wife and determined the ethnicity of the individual. The client had assumed each time that I would want whatever was easiest to read. Reading difficult handwriting is part of a professional's skill set. Also sending the typed abstract is a good idea, though. It saves time, and the professional can simply mark any corrections on it and return it.

8. Beware of stating relationships as if they were already proved, and never add “helpful” information when describing a document.

For example, do not say “John deeded the 100 acres on Cripple Creek to his son Thomas” if the deed merely says that John sold 100 acres to Thomas, with no waterway and no relationship stated. The professional, who can approach the problem with a clear mind (we all get too close to our own research problems), may wonder if it is a different 100 acres, a different John, or a different Thomas, especially given the \$500 price tag.

9. Do you want information on collateral lines?

If you want the professional to search for deeds for John Jones, consider whether or not you might want the index entries abstracted or photocopied for all Joneses for a certain time period to help guide future research. Your decision should be based on a variety of factors. If you know from census records that there weren't many men with that surname and you can limit the time period, it might be very worthwhile. You might even spot an “et al”

deed from John's children. The type of index makes a big difference. Discuss this with the professional. The task may be as simple as photocopying two pages each of the grantor and grantee indexes, or it may require line by line reading of many pages of one of those inventive patented index systems.

10. Do not tell the professional your life story nor that of your ancestor's purported illustrious ancestry. Stay focused on the problem at hand.

I have seen lengthy letters of instruction that neglected to include such important information as dates or the name of the ancestor for whom the information was being sought. Well, in all fairness, the name was there—along with that of dozens of other ancestors and their families. The first problem that the professional had to solve was to figure out what the problem was.

With a little bit of extra effort in writing the letter of instruction, as George says in his original article, “You will find that a professional researcher's work can provide many insights and details that you might never uncover.”