

THE SECRET PROFESSIONALS DON'T SHARE

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There is a secret for successful research that professional genealogists don't share with others. Before I am deluged with complaints from my professional friends and colleagues, let me say up front that they don't deliberately withhold the secret. In fact, they don't even know it is a secret. It is so ingrained in how they work, that they probably have never even thought about it.

What is this secret? The research report. "Aargh!" I hear you cry, "I don't want to write a report." It is, however, the secret to organizing your research process effectively. Examples of research reports have been presented in several books and manuals and in syllabus material at conferences. The core of the secret lies not so much in the details of presentation, but in the typical sections of a research report.

- Assignment
- Information provided by client and prior reports
- Sources searched
- Findings and analysis
- Suggestions for further research

This doesn't necessarily look like it applies to your research—or does it? Let's look at this item by item. As we do so, we'll examine each with the family historian in mind.

The section is labeled "Assignment," but professionals most often receive from the client what are better called "Goals," such as "Identify parents and spouse of John Jones." Sound familiar? This goal is, however, far too broad to be a practical assignment. It is best to make the goal more bite size. The solution might be to break the search for the parents apart from the search for a spouse, but that often isn't the most effective way to research.

Instead, be practical. Consider breaking the goal down by record groups and/or by repository. For example, "Search census records for Jones and collateral families in Green County."

In a professional report there usually is a subheading within the assignment that defines the time limitation. I would suggest that you begin by thinking in approximate four-hour chunks.

Open a new file in your word processor. Create a heading for "Immediate goal" and then state your goal. Follow this with a heading for "Projected time" and put "4 hours."

The professional works based on information provided by the client and any prior reports. What do you know about your problem? At this point you may cry, "But I have *lots* of stuff." Maybe it isn't as much as you think. The research report forces the professional to focus. He or she focuses on facts, not hypothesis (see "Red Flags and Rationalization" and "Genealogical Advice from Sherlock

Holmes"). The professional also knows to focus on what is pertinent to this portion of the problem.

When I focus only on pertinent facts, I have seen dozens of sheets of paper sent by clients collapse to three statements of records found and two statements of records searched unsuccessfully. Notice the latter category. Do not neglect to state it as part of what you know. It either tells you something important about your ancestors, or it tells you that the method used for searching may have been deficient.

We're going to digress here for a reality check. At this point in preparing a client report—or in picking up on old research of my own—I often find that I have no business proceeding with my stated goal because the data that I already have is defective. For example, I may find that I can't search for collateral lines because I know the names of the siblings but they have no spouses identified.

Or there is a deed of sale listed, but no deed of purchase. Were all the deeds searched? I can't tell. Or the 1850 census abstract for the young William Wilson family fails to list neighbors, so I won't know which of the two dozen Wilson families in the county I should be considering.

When this happens, I usually end up redefining the most urgent research goal. Once I've got the correct goal, it's time to make a Research Plan. Before leaving home, I outline what sources I will check, in what order. With many catalogs available online, I often enter full citations—with call numbers—and print the list before leaving home.

The Research Plan doesn't appear in a typical report because it is hidden. Or, more accurately, it morphs from "Sources to search" to "Sources searched."

As I research, I note my findings in writing—including negative results.

Too many family researchers consider the research results as the final step of the process. The secret, however, lies in the analysis of those findings (both specific and general) and in the last section of the report, "Suggestions for further research."

Both the analysis and the suggestions should always be written out. It makes it easier to share with others and is immensely helpful if we must put a project aside for a while.

The suggestions should be written as an itemized list. Each suggestion might be a research goal, but you can't do everything at once. With the future research suggestions clearly listed, it is easier to focus and to prioritize your next goal. The list also reduces the possibility that you may overlook a potentially productive research path.