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# REPORTING ON RESEARCH: STANDARDS ENCOURAGE BETTER COMMUNICATION

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## BENEFITS OF STANDARDS

Standards pervade all industries and fields of research including genealogy. Without standards the infrastructures that support our daily lives—such as construction, finance, medicine, and telecommunications—would break down. Standards provide

- a measure of agreed quality,
- a framework of expectations, and
- principles to ensure consistent performance.

**“Good writing is an art that requires practice, the application of standards, and that certain flair. Every one of us has the power to present our work in its best light . . .”**

**—Pamela Boyer Sayre<sup>1</sup>**

Applying standards can improve our written communication. Genealogical standards apply to all genealogical research and writing, including work done for ourselves and for others. Research conducted without reporting and sharing the details is wasted effort. Guidance from standards helps us prepare more informative, accurate, and useful reports.

A research report is a unique type of genealogical writing. Its purpose is to provide a detailed and clear account of an investigation into a research problem, including analysis, interpretations, hypotheses, and reliable conclusions (if any) based on evidence.

Standards do not constrain reports to a particular format, structure, or style. Nor do standards prescribe the type, number, or format of enhancements. Reports may—and usually do—include supplementary material such as appendices, attachments, charts, exhibits, figures, images, maps, research logs, tables, and so forth. A researcher has many choices in expressing a unique, creative style of written presentation. Following standards along with principles of good writing helps a researcher be more effective in reporting on research.

***Following genealogical standards for reporting ensures that***

- reports are clear and easily understood,
- evidence is honestly represented,
- hypotheses are not overstated,
- conclusions are valid, and
- others can be confident of our findings.

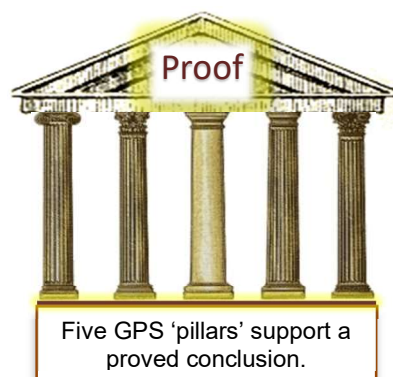
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Websites were viewed 21 February 2021.

1. Pamela Boyer Sayre, “Effective Writing and Editing,” *OnBoard* 16 (September 2010): 22; *Board for Certification of Genealogists* (<https://bcgcertification.org/skillbuilding-effective-writing-and-editing/>).

## REPORTS AND THE GENEALOGICAL PROOF STANDARD

The Genealogical Proof Standard (GPS) underpins all genealogical research and reporting. Its five elements or “pillars”—reasonably exhaustive research, complete source citations, analysis and correlation of information, resolution of conflicting evidence, and a soundly reasoned, written conclusion—are required for a “proved” genealogical conclusion.<sup>2</sup> If any one element is missing, the GPS is not met. Newfound evidence is likely to overturn a conclusion that did not meet the GPS at the outset. Reported conclusions for kinship or identity might later be found flawed or wrong because the work did not meet the GPS.



Reports clearly communicate findings and must distinguish among

- a conclusion that meets the GPS;
- a theory, hypothesis, or potential conclusion based on evidence requiring further testing; and
- an analysis and interpretation of evidence gathered so far in the research process.<sup>3</sup>

Unfounded speculation and guesses have no place in reports that meet standards.<sup>4</sup>

### Multiple Research Sessions

A single research session often cannot reach a conclusion that meets the GPS because of time, travel, repository, or other restrictions. In this situation, the research report

- explains why a conclusion was not reached;
- describes the progress made toward the goal, including all evidence found; and
- recommends next steps to advance the work toward the goal, including specific and fully identified sources to be consulted. These details become the foundation of the work plan for the next research session, thereby improving efficiency in the next phase of work.

## STANDARDS FOR DOCUMENTING

*Genealogy Standards* includes eight standards for documenting work.<sup>5</sup> All apply to reports. Well-documented reports include a complete source citation for each assertion that is not common knowledge. Citations use humanities-style format, generally well suited to manuscripts and original sources.<sup>6</sup> Multi-page reports include safeguards to prevent page separation and information loss. See references #9 and #11 for more about documentation principles.

## STANDARDS FOR RESEARCHING

Several data-collection standards for researching, as outlined in *Genealogy Standards*, are important in research reports—data-collection scope, note-taking content, distinction between content and comments, note-taking objectivity, and images and printouts.<sup>7</sup> The lecture describes and explains how to apply these standards when preparing reports.

2. Board for Certification of Genealogists, *Genealogy Standards*, 2nd ed. (Nashville, Tenn.: Ancestry.com, 2019), 1–3.

3. Elizabeth Shown Mills, “QuickLesson 16: Speculation, Hypothesis, Interpretation & Proof,” *Evidence Explained: Historical Analysis, Citation & Source Usage* (<https://www.evidenceexplained.com/content/quicklesson-16-speculation-hypothesis-interpretation-proof>).

4. *Genealogy Standards*, 36 for Standard 63, “Honesty.”

5. For details, see *Genealogy Standards*, 5–9.

6. *The Chicago Manual of Style*, 17th ed. (Chicago: The University of Chicago Press, 2017). Also, Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, 3d ed., rev. (Baltimore, Md.: Genealogical Publishing Co. [GPC], 2017).

7. For details, see *Genealogy Standards*, 16–18.

## STANDARDS FOR WRITING

The table lists several genealogical writing standards that are important for research reports.<sup>8</sup>

Writing Standard	Description
64. Background information	Provide sufficient background for readers to understand the meaning of findings, including context of a source's time and place.
67. Overall format	Choose page layouts, fonts, headings, page headers and footers, and other features that maximize comprehension.
68. Structure	Organize the report in a logical sequence using coherent structured parts.
69. Clear writing	Use a precise, clear writing style free of jargon, digressions, or irrelevancies.
70. Technically correct writing	Follow the conventional rules of grammar, spelling, punctuation, and word usage.
71. Cross referencing	Include a cross-reference or call-out to each image, attachment, or enhancement.

### Overall Report Characteristics

*Genealogy Standards* includes one overarching standard specific to research reports. Standard 74 outlines ten required characteristics.<sup>9</sup>

- Identification of author, recipient, date, and subject
- Recapitulation of previous research to place new work in context
- Purpose, focus, or specifications of the report
- Limitations on the research
- Content and format focused on the report's purpose or specifications
- Background and context of the research
- Findings logically and appropriately presented for the project and in sufficient detail to prevent unnecessary future searches
- Descriptions of all searches yielding both positive and negative results, which are presented in sufficient detail to prevent unnecessary future searches
- Explanation of deficiencies when research is insufficient to reach a conclusion
- Safeguards that minimize page separation and data loss

### Report Structure

Most reports contain five sections or parts.

- Background information
- Executive summary (a brief summary of findings)
- Body of the report describing sources, findings, analyses, hypotheses, and conclusions
- Suggestions for further research if the problem was unresolved
- Supplemental materials (appendices, attachments, images, maps, and so forth)<sup>11</sup>

**“So the writer who breeds more words than he needs is making a chore for the reader who reads.”**

—Theodor Geisel (Dr. Seuss)<sup>10</sup>

8. For details, see *Genealogy Standards*, 36–39.

9. *Ibid.*, 40–42.

10. Theodor Seuss Geisel, “A Condensed Poem in Praise of Reader’s Digest Condensed Books,” *Reader’s Digest Condensed Books*, vol. 1 (Pleasantville, N.Y. : Reader’s Digest Assoc., 1980), back cover.

11. Nancy A. Peters, “Research Reports,” in Elizabeth Shown Mills, ed., *Professional Genealogy: Preparation, Practice, and Standards* (Baltimore, Md. : GPC, 2018), 429–442.

## FOR FURTHER STUDY

Websites were viewed 12 March 2021.

1. Board for Certification of Genealogists. *Genealogy Standards*, 2nd ed. Nashville, Tenn.: Ancestry.com, 2019. For the October 2020 revision, see “Revised Standard 57.” *Board for Certification of Genealogists*. <https://bcgcertification.org/ethics-standards/revised-standard-57/>.
2. \_\_\_\_\_. “Standards for Documenting.” *Board for Certification of Genealogists*. <https://bcgcertification.org/ethics-standards/documenting/>.
3. \_\_\_\_\_. “Standards for Researching.” *Board for Certification of Genealogists*. <https://bcgcertification.org/ethics-standards/researching/>.
4. \_\_\_\_\_. “Standards for Writing.” *Board for Certification of Genealogists*. <https://bcgcertification.org/ethics-standards/writing/>.
5. DeGrazia, Laura Murphy. “Planning Effective Research.” *OnBoard* 21 (September 2015): 17–18, 23. *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-planning-effective-research/>.
6. Gulbrandsen, Linda “Writing a Quality Research Report.” In Kory L. Meyerink, et al., eds. *Becoming an Excellent Genealogist: Essays on Professional Research Skills*. [Salt Lake City, Utah]: ICAPGen, 2012.
7. Jones, Thomas W. “Roots of Today’s Standards for Amateur and Professional Genealogy.” *Crossroads* 11 (Spring 2016): 4–9.
8. \_\_\_\_\_. *Mastering Genealogical Proof*. Arlington, Va.: National Genealogical Society, 2013.
9. \_\_\_\_\_. *Mastering Genealogical Documentation*. Arlington, Va.: National Genealogical Society, 2017.
10. McGhie, Angela Packer. “What Happens When We Do Not Follow Standards?” *Association of Professional Genealogists Quarterly* 28 (December 2013): 176–79.
11. Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. 3d ed. rev. Baltimore, Md: Genealogical Publishing Co., 2017.
12. \_\_\_\_\_. “Good Genealogical Writing.” *OnBoard* 4 (May 1998): 16. *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-good-genealogical-writing/>. Although written two decades ago, this article from a leading writer and editor of the field is still relevant today.
13. \_\_\_\_\_. “Ten-Minute Methodology: Documentation and the Research Report.” Blog, 21 January 2016. *SpringBoard*. <https://bcgcertification.org/ten-minute-methodology-documentation-and-the-research-report/>. Mills answers questions about meeting documentation standards in reports.
14. \_\_\_\_\_. “Producing Quality Research Notes.” *OnBoard* 3 (January 1997): 8. *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-producing-quality-research-notes/>.
15. Peters, Nancy A. “Research Reports.” In Elizabeth Shown Mills, editor. *Professional Genealogy: Preparation, Practice, and Standards*. Baltimore, Md.: Genealogical Publishing Co., 2018. Pages 415–50, especially 420–21 for standards. The chapter contains examples taken from reports.
16. Sayre, Pamela Boyer. “Effective Writing and Editing.” *OnBoard* 16 (September 2010): 21–22. *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-effective-writing-and-editing/>.

## Sources for Sample Reports

17. “Genealogical Work Samples: Research Reports.” *Board for Certification of Genealogists*. <https://bcgcertification.org/learning/skills/genealogical-work-samples/#RR>. Several client reports written by various BCG associates are available for study.
18. Lennon, Rachal Mills. “Work Samples: Research Reports.” *Finding Southern Ancestors*. <https://www.findingsouthernancestors.com/work-samples>. The website contains many examples of client research reports.
19. Mills, Elizabeth Shown. “Genealogical Reports.” *Historic Pathways*. <https://www.historicpathways.com/researchreports.html>. This site contains many examples of research reports and research notes written by Mills.