Dear Me,
Writing Research Reports to Yourself

Webinar sponsored by the Board for Certification of Genealogists

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Introduction

Writing research reports is a powerful tool for any genealogist—not just professionals. It helps you analyze the sources you have found more deeply and see patterns that you might otherwise have overlooked. It helps you document your research to share with others, or to pick it up at a future date. But most importantly, it helps you build reliable conclusions.

Genealogy programs often don't have a place for in-depth analysis or an explanation how you came to a conclusion. In a research report, you can document your research, citations, analysis, resolution of conflicts, and conclusions—all the elements you need to meet the Genealogical Proof Standard. For aspiring professionals and transitional genealogists, writing research reports to yourself is a great way to practice the skills you will need when taking paying clients.

When to write a research report

Research reports are useful whenever you do research, whether online or in a research facility. You can also write a research report to review previous conclusions, perhaps as part of a do-over or level-up challenge. Writing a report allows you to see the information you found previously with fresh eyes. The act of writing will force your brain to consider your research problem from new angles, which often generates new ideas. It will alert you to implicit assumptions that need to be checked and to spot opportunities you may have missed.

If you have not written a research report before, a research report to verify an existing conclusion or revisit old research is a good place to start. Perhaps you have a line where other genealogists came to a different conclusion, or that you want to publish about some day.

Elements of a Research Report

1. **Introduction**
   a. Title.
   b. Name of the researcher.
   c. Date and version.
   d. Description of the starting point.
   e. Research questions.
   f. Limitations (e.g. burned courthouse, deadline for family reunion).
   g. Executive summary.
   h. List of sources used.
2. **Research notes**
   a. Analysis of known information and available sources for the time and place.
   b. Analysis of each source consulted.
      i. Citation.
      ii. Abstract/transcription/translation (what does it *say*).
      iii. Interpretation (what does it *mean*).
      iv. Evaluation of reliability of the source. Is it an original document? Does the informant have first-hand information? Could the informant have a reason to lie? Could the recordkeeper have altered the document?
   c. Comparison and correlation of sources.
      i. Analyzing if different sources are about the same people and locations.
      ii. Detecting and resolving conflicts between evidence.
      iii. Aids: timelines, tables.
3. **Conclusion**
   a. Assessment of the evidence, including a proof argument or statement if the research supports a conclusion.
   b. Open research questions.
   c. Suggestions for further research.
4. **Appendix**
   a. Images of sources consulted (cross-referenced from research notes).
   b. Possibly: other overviews, such as charts, maps, property lists, lists of associates.

Logical order to create a research report

− Start with the description of the research you intend to do in this report (1a–f).
− Analyze the starting point, including the available sources (2a).
− Create a research plan and put it in the suggestions for further research (3c)
− For each source that you use, analyze it (2b) and capture the image (4a). Cross off the item from the research plan (3c). If you think of new research questions and suggestions for further research, update these sections (3b–c).
− Compare and correlate sources (2c) and update research questions and suggestions (3b–c).
− Keep analyzing and comparing sources and updating the plan (2b, 4a, 2c, 3b–c, 4b).

- Assess the quality of the evidence to see if it supports a conclusion. If so, write a proof statement (direct evidence in agreement) or proof argument (conflicting or indirect evidence) that explains how you come to the conclusion (3a).
- Write the executive summary and list of sources (1g–h). Update the date and version (1c).
- Update the open research questions and suggestions for further research (3b–c).

Scope of a report

When writing a report for your own research, you don't have a client who will limit the time you can spend on it, so how do you determine how large a report should be? To prevent reports from becoming unwieldy, write one report per block of research and refer back to previous reports in the summary of the starting point. Setting yourself a time limit can help to force you to work efficiently, as practice for client work.

Examples of useful scopes for research reports:

- Documenting the research to answer a specific research question about one of your ancestors.
- Documenting the research you did into a particular family while you were at a repository.
- Documenting how you reviewed the existing conclusions about a known ancestor.
- Documenting how you resolved a discrepancy between your own tree and information found in a publication.
- Documenting all the research you did into one particular ancestor or nuclear family.
- Documenting a literature study into the available publications about a particular family.
- Documenting the historical, legal, or geographic context of a family.

After you finish the report

If the research led to a reliable conclusion, you can update the information in your family tree. You can copy whatever images, citations, abstracts, and analysis you find useful to your genealogy program.

You could publish your conclusions. Well-documented research is a good basis for a written story to share with your family, a case study in a journal, or maybe even a book about your ancestors.

The report itself can be converted to PDF to share with relatives or other genealogists who are working on the same line. You could attach it as a media file in your genealogy program or online tree; perhaps marking it private if it is for your personal use only. Attach the PDF to all people in the report in your tree to easily find it when you do more research into the same people. Having the report in PDF makes it less likely to be taken apart and makes it clear what the version is.

The next time you work on the family, you can start a new report, or you can continue the existing report. A new report has a clear focus, and less chance of confusing different versions of the report; while continuing the same report has all the information in one place, but can become bulky. For larger research projects, creating multiple reports that refer to each other is often more efficient.

Further study

Board for Certification of Genealogists. *Genealogy Standards*, 2ⁿᵈ edition revised. Nashville, Tennessee: Ancestry, 2021. Especially standard 74, "Reports."

Elder, Diana, Nicole Dyer, and Robin Wirthlin. *Research Like a Pro with DNA: A Genealogist's Guide to Finding and Confirming Ancestors with DNA Evidence*. Highland, Utah: Family Locket Books, 2021. Especially chapter 10, Research logs.

Gulbrandsen, Linda K. "Writing a Quality Research Report." Kory L. Meyerink, Tristan L. Tolma, and Linda K. Gulbrandsen, eds. *Becoming an Excellent Genealogist: Essays on Professional Research Skills*. ICAPGEN, 2012.

Hoitink, Yvette. "Six Levels of Ancestral Profiles – Level-Up Challenge!" *Dutch Genealogy* : 2021.

Jones, Thomas W. *Mastering Genealogical Documentation*. Arlington, Virginia: National Genealogical Society, 2017.

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McGhie, Angela Packer. "Analyzing Documents Sparks Ideas for Further Research." Board for Certification of Genealogists, sponsor. *Family Tree Webinars* : 2017.

Mills, Elizabeth Shown. "Dissection & Analysis of Research Problems: 10 Steps to a Solution." *Family Tree Webinars* : 2023.

_____. "Information Overload? Effective Project Planning, Research, Data Management & Analysis." *Family Tree Webinars* : 2024.

_____. "Research Reports." Elizabeth Shown Mills, ed. *Professional Genealogy: A Manual for Researchers Writers Editors Lecturers and Librarians*. Baltimore, Maryland: Genealogical Publishing, 2001.

_____. "QuickLesson 20: Research Reports for Research Success." *Evidence Explained: Historical Analysis, Citation & Source Usage* : 2015.

_____. "Ten-Minute Methodology: Documentation and the Research Report." *Board for Certification of Genealogists* : 2017.

Peters, Nancy A. "Reporting on Research: Standards Encourage Better Communication." *Family Tree Webinars* : 2021.

_____. "Research Reports." Elizabeth Shown Mills, ed. *Professional Genealogy: Preparation, Practice &* Standards. Baltimore, Maryland: Genealogical Publishing, 2018.

Powell, Elissa Scalise. "Writing as You Go is the WAY to Go!" *Family Tree Webinars* : 2022.

Stanbary, Karen. "Techniques for Integrating Documentary and Genetic Information in a Research Report." *Family Tree Webinars* : 2020.

Examples of research reports

Board for Certification of Genealogists. "Genealogical Work Samples." *Board for Certification of Genealogists*.

_____. *Standards Manual*. Millennium edition. Washington, DC: Board for Certification of Genealogists, 2000. Especially appendix C: Example reports.

Lennon, Rachal Mills. "Work Samples." *Finding Southern Ancestors*.

Mills, Elizabeth Shown. "Research Reports." *Historic Pathways*.

Examples of research reports can also be found in the chapters of *Professional Genealogy* cited above.

Download and contact information

The sample report is available via https://www.dutchgenealogy.nl/dearme.

Yvette Hoitink can be contacted via https://www.dutchgenealogy.nl/contact.