

ESSENTIAL RESEARCH REPORTS: 3 SAMPLES

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Successful research projects—for our own families, as well as for clients—follow a three-stage process:

1. Analysis and planning:

Before new research is launched, we analyze the known data for clues, patterns, contradictions, weaknesses, misassumptions, and errors. We then prepare a research plan that defines (a) the resources to be explored, (b) the strategies to be applied, (c) the individuals who are to be included in that search, and (d) any special circumstances that will affect the project. The working document we create in this stage is called a **Preliminary Analysis & Research Plan**.

2. Execution of research:

Because genealogical research is an analytical process—not just a gathering of photocopies that carry a certain name—each block of research should be documented by a detailed **Research Report**. The best time and place to prepare that report is while we are conducting that search, onsite or online.

Using the Research Plan as a foundation for the Research Report, we identify (a) each source we examine, (b) any flaws or other considerations that affect the quality of the source, and (c) all findings—negative as well as positive. For each finding, our report should include (d) an abstract or transcript of the document, (e) relevant analysis about significant details, and (f) a crossreference to any image copy that we make. Because any new discovery can require us to alter the course of our research, all new finds should be analyzed as they occur, rather than postponed until the completion of a set number of hours. When the block of research ends, the Research Report should be reviewed, overall analysis added, and a new Work Plan created—based upon the new findings.

3. Processing of data in a way that advances future research:

For each individual we study, we need to maintain a set of complete **Research Notes**. Each person's notes need to (a) record all searches made, positive or negative; (b) provide transcripts or abstracts of every relevant record, being careful to preserve *all* details from each document; (c) include critical analyses that are clearly set apart from the abstracts or transcripts so that the details in the actual records will not be adulterated by our interpretations; and (d) present all these findings in a chronological time frame. These individual Research Notes can be easily compiled—and updated with each new segment of research—through cut-and-paste from the Research Report.

The analytical value of each person's Research Notes is immense. This compilation spotlights gaps in each life that need to be filled. It enables us to define patterns and conflicts between records and to identify associates who are frequently present in this individual's life. Unlike the genealogical narratives created by family-history software, the format of these Research Notes preserve a clear separation between the details that actually appear in each record and the assumptions we made about that record at the time we did data entry.

Attached for your consideration are samples of each type of report:

1. **“Samuel Witter, 17th U.S. Infantry, War of 1812 Enlistment Record: An Analysis”** {a document analysis & research plan}
2. **“Samuel Witter (1787–1876) and the War of 1812”** {reflecting the execution of that plan}
3. **“Research Notes: Samuel Witter (1787–1876)”** {reflecting all work done and findings made to date}