

Module 6 - Planning and Reporting

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Module 6: Planning and Reporting

December 8–14

Readings BCG. *Genealogy Standards*. 2nd ed.

Lesson 1: • "Planning Research," Standards #9-18

DeGrazia, Laura Murphy. "[Planning Effective Research](#)." *OnBoard* 21 (September 2015): 17-18, 23.

Mills, Elizabeth Shown. "[QuickLesson 17: The Evidence Analysis Process Model](#)." *Evidence Explained: Historical Analysis, Citation & Source Usage*.

Powell, Kimberly. "[Think Like a Detective – How to Develop a Genealogy Research Plan](#)." *ThoughtCo*.

Lenzen, Connie M. [Oregon](#). NGS Research in the States Series, Special Publication No. 78 Arlington, VA.: National Genealogical Society, 2007.

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Readings BCG. *Genealogy Standards*. 2nd ed.

Lesson 2: • Standards #25-27, 35-36

Powell. *The Everything Guide to Online Genealogy*. 3rd ed.

- "A Research Log is Essential," pp. 24–25
- "Taking Good Notes Will Improve Results," pp. 25–26
- "Document Your Findings," pp. 31–33

Mills, Elizabeth Shown. "[Skillbuilding: Producing Quality Research Notes](#)." *OnBoard* 3 (January 1997): 8.

- Readings** BCG. *Genealogy Standards*. 2nd ed.
- Lesson 3:**
- Standards #62-71, 74.
- Mills, Elizabeth Shown. "[QuickLesson 20: Research Reports for Research Success](#)." *Evidence Explained: Historical Analysis, Citation & Source Usage*.
- Discussions:** **Discussions 9 & 10** postings end Monday, December 14 at 11:59 PM ET
- Assessment:** **Module 6: Research Planning & Reporting** due Monday, December 14 at 11:59 PM ET
- Note:** Access to discussion forums and assessment ends on Monday, December 21.

Lesson 1: Developing Research Plans

Overview and Objectives

It's great fun to hop, skip, and jump around on the internet in the pursuit of ancestors. Yet, there comes a time when that activity doesn't produce success. Sometimes people say they "hit a brick wall." When this happens, there are two choices someone can make. One is to continue hopping around. Another is to develop a method. That method involves creating a research plan and then executing it—and recording the entire process.

Whether you are new to genealogy or an experienced researcher, effective genealogy begins with a plan. Ten standards out of the ninety standards in the *Genealogy Standards* book deal with research planning. With that many focused on plans, clearly a plan is critical for successful genealogical research.

Learning Objectives

Upon completion of this lesson, you should be able to:

- Develop strong research questions
- Identify the components of a research plan
- Create a research plan

Reading Assignments

- BCG. *Genealogy Standards*. 2nd ed.
 - "Planning Research," Standards #9–18
- DeGrazia, Laura Murphy. "[Planning Effective Research](#)." *OnBoard* 21 (September 2015): 17-18, 23.
- Mills, Elizabeth Shown. "[QuickLesson 17: The Evidence Analysis Process Model](#)." *Evidence Explained: Historical Analysis, Citation & Source Usage*.
- Powell, Kimberly. "[Think Like a Detective – How to Develop a Genealogy Research Plan](#)." *ThoughtCo*.
- Lenzen, Connie M. *Oregon*. NGS Research in the States Series, Special Publication No. 78. Arlington, VA.: National Genealogical Society, 2007.
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What is a Research Plan?

A research plan is like a to-do list, but there's more. You develop a research question, analyze your starting point information, and identify records and sources that might contain answers to your research question. These sources might include the following:

- Censuses: federal, state, and local
- Vital records: births, deaths, marriages
- Probate records: wills, intestate, and guardianship
- Land records: government land, local land, and taxes
- Court records: court minutes, jury lists, dockets
- Military records: service records, pension records, drafts
- Newspapers: obituaries, social columns
- Church records: baptismal records, funerals, membership
- Immigration and naturalization records: passenger lists, citizenship records, passport applications
- DNA: atDNA, Y-DNA, mtDNA, and X-DNA

The list above is more of a list of record groups, rather than actual sources. This list is too generic to be actionable. You want your research plan to be as specific as possible. If you pick up your research plan six months from now, would you know exactly what to do? Once you have a research plan, that's your to-do list.

You might wonder how many steps you should have on your research plan at one time. Research plans must be dynamic. Each time you complete one of the items on your to-do list, it might send your research in another direction or direct you to new sources you will want to check. Therefore, you don't want your research plan to be too extensive because you must have the ability to change direction when needed. Your completed research plan should represent "reasonably exhaustive research," but don't plan for every potentially relevant source at the beginning of your research because as your research progresses those sources might turn out not to be relevant after all.

In what order do you execute the research? You may have a long list of sources that need to be prioritized. To start, compare it to going to the mall to pick up items from three different stores. You enter the mall through the door closest to where you parked. The stores you need aren't all near that door. They are in three widely separated areas. You prioritize your shopping. You go to the closest store first, and you shop for an item on your list. It could be the second item on your list, but the store is closest to you. Apply that to a research plan. Priorities need to be set about which item you will first research. One way to choose is selecting the item that is easiest/quickest to access.

This is a lot more efficient than the alternative.

Wait. Let's back up a minute. How do we come up with this research plan? Developing a research plan takes a little bit of background work. Try following these steps:

1. Develop a research question
2. Analyze starting point information
3. Identify records and sources
4. Create a detailed and efficient research plan

Step 1: Develop a Research Question

Let's say your goal is to apply for membership in the Sons and Daughters of Oregon Pioneers. You are a descendant of John Eppinger who lived in Baker County, Oregon in 1870. In order to complete your application, you need to learn more about him and his life.

A timeline was created in Lesson 3 of Module 5 for John Eppinger in three censuses.

The John Eppinger family in the 1860, 1870, and 1880 Oregon censuses			
Who	1860 Wasco County, Oregon, census1	1870 Baker County, Oregon, census2	1880 Baker County, Oregon, census3
John Eppinger	John Eppinger, age 26, butcher, \$500 worth of personal estate, born Wirtemberg, married within the year	John Eppinger, age 34, m, w, butcher, \$400 worth of real estate, \$100 worth of personal estate, born Wertenberg, father and mother of foreign birth, male citizen of the U.S.	In 1880, No John Eppinger with the family. No John Eppinger in Ancestry's census index.
Charlotte Eppinger	Charlotte, age 24, born Saxony, married within the year	Charlotte, 32, f, w, keeping house, born Saxe Weimar, parents of foreign birth	Charlotte, w, f, 44, mother, widowed, keeps house, born Saxony, parents born Saxony
		Paulina, 9, f, w, at home, born Oregon, attended school within the year, parents of foreign birth	In 1880, no Paulina with the family. Since she would have been around 19-years-old, she may have married. To do: research Baker County marriage records.
		Clara, 5, f, w, born Oregon, at home, parents of foreign birth	Clara, f, w, 15, dau, attended school w/in the year, born Oregon, father born Wertemberg, mother born Saxony
		Frederick, 3, m, w, born Oregon, at home, parents of foreign birth	Fred, m, w, 13, son, attends horses, attended school within the year, born Oregon, father born Wertemberg, mother born Saxony
<p>1860 U.S. census, Wasco County, Oregon, population schedule, Dalles Pct, page 205 (penned), dwelling 1972, family 1652; digital image, <i>Ancestry</i> (http://www.ancestry.com : accessed 25 June 2017), citing NARA microfilm publication M653, roll 1056.</p> <p>1870 U.S. census, Baker County, Oregon, population schedule, Baker City, page 2 (penned), dwelling 17, family 17, John Eppinger; digital image, <i>Ancestry</i> (http://www.ancestry.com : accessed 4 May 2017), citing NARA microfilm publication M593, roll 128.</p> <p>1880 U.S. census, Baker County, Oregon, population schedule, Baker City Oregon, ED 1, page 2, dwelling 18, family 18, Charlotte Eppinger; digital image, <i>Ancestry</i> (http://www.ancestry.com : accessed 7 October 2017), citing NARA microfilm publication T9, roll 1080.</p>			

First, review *Genealogy Standards*, Standard #10. We are going to try to develop an effective research question that meets this standard.

Attempt #1: "What can I learn about John Eppinger and his life?"

Which John Eppinger? There was likely more than one person with this name in the history of the world. This question does not provide enough details to make him a, "clearly described unique person." Try to anchor him in a time and place.

Attempt #2: "What can I learn about John Eppinger, who lived in Baker County, Oregon in 1870?"

Now we know which John Eppinger you are talking about. There was only one person by that name enumerated in the 1870 census in Baker County, Oregon. But is this a question of, "identity, relationship, events, and situation?" No. As written it is very broad. Be specific about what exactly you are trying to learn. In the census timeline we noted that he was present in the 1870 Baker County, Oregon, census but not the 1880 Baker County, Oregon, census. Charlotte, his wife, was enumerated as a widow in 1880.

Attempt #3: "When and where did John Eppinger, who lived in Baker County, Oregon in 1870, die?"

This question is about "a clearly described unique person," and it is about "specification of unknown or forgotten information that the research is to discover." It is sufficiently broad enough to be answered. For example, an answer might be a range of dates or a specific date. The location

might be a state, county, city or specific address. You might have other questions that need to be answered but focus on one question at a time as each question might lead to a different research plan.

Warning: Be careful of “why” questions. It is difficult to determine the motivations of people in the past. You want to ask questions that are about something that records might reveal. Few records provide information on motivation. Also be careful of “Who was” questions as the answer can be very broad. For example, “Who was Helen Keller?” The answer could be all of the following: she was blind, she was deaf, she was a teacher, she was an author, she was a daughter, she was a student of Anne Sullivan, she was a college graduate, etc. Be specific about what exactly you want to find out. This is not the same as a question like, “Who was the mother of Helen Keller, who was born on 27 June 1880 in Alabama.” That is a valid question as the subject is clearly defined and you are trying to discover the answer about a relationship.

Watch this video example of Step 1: Develop a research question. This is for instructional purposes only—please do not do your own research on the people referenced in the video.

Steps to Develop a Research Plan

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Step 2: Analyze Starting Point Information

Now that you have an effective research question, we need to analyze the starting point information (*Genealogy Standards*, Standard #11). In this case, we had the 1860, 1870, and 1880 census records. There are different tools and techniques that might be helpful to use when analyzing information. For example, critique the sources, write a biographical sketch, and/or create a timeline.

Part of this research or any research involves a critique of the sources. You want to think about what you already “know”, how you know it, and if it is reliable. The censuses, all image copies of originals, provide direct evidence for names, ages, occupations, birthplaces, and value of property. The informant for this information is unknown, and that type of situation means we need to conduct research to verify the facts.

A biographical summary created from analysis of the census might go like this: John Eppinger was born about 1833 or 1834 in Wuerttemberg, and he may have died before 1880. His wife's given name was Charlotte. His apparent children, all born in Oregon, were Paulina, Clara, and Frederick. By occupation, he was a butcher, and he owned real estate in Baker County. It is up to you whether you do the biographical sketch to help you generate a research question or after you crafted one. Regardless of when you do it, it is beneficial to have a biographical sketch when generating the research plan.

Meanwhile, we already created the census timeline back in Module 5, Lesson 3. That timeline highlighted to us that John Eppinger might have died between 1870 and 1880.

Watch this video example of Step 2: Analyze starting point information. This is for instructional purposes only—please do not do your own research on the people referenced in the video.

Steps to Develop a Research Plan

1. Develop a research question
- 2. Analyze starting point information**
3. Identify records and sources
4. Create a detailed and efficient research plan



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Step 3: Identify Records and Sources

The next step is to identify the availability of records that apply to your research question (*Genealogy Standards*, Standards #12 and #14). Be sure to consider changes in geographic boundaries, laws that were in place at the time, and events that might affect your research. For example, West Virginia was not founded until 1863, so if you are researching land records before that, you need to know where to look for those records. If you are researching probate records in New York state after 1830, it is helpful to know that each estate required a probate petition that listed all legal heirs—even if they were omitted from a will. If you are researching your family in Abbeville, South Carolina, you want to know when the courthouse burned and if that will affect record availability.

In our example, we need to come up with a list of records and sources that could answer our research question: “When and where did John Eppinger, who lived in Baker County, Oregon in 1870, die?” Our goal is to use original sources created by people who had knowledge of the facts. That’s “primary information.”

- The “normal” record would be a death record. This means we need to research vital record availability. Were deaths recorded in Baker County in the 1870s?
- John had real estate, and that is often sent through a probate process. Are Baker County deeds or probate records available?
- Cemeteries are a good source of information. Tombstones might be created after death, and the informant is usually not known. That makes them not quite as good as a death certificate or a probate.
- Newspaper obituaries are a good source of death information—if there was an obituary.
- Where do we go to find out what resources are available?

I usually check [*Ancestry's Red Book: American State, County, and Town Sources*](#) edited by Alice Eichholz. It is available at many libraries or on *Ancestry.com*; however, this resource is not part of the Ancestry Library Edition. I also check the [FamilySearch Wiki](#), which you have already used and which is discussed more below. Lastly, it is always good to check with local experts.

The National Genealogical Society publishes a research series called NGS Research in the States. Expert genealogists who are familiar with their state’s genealogy resources author the books, each book having a similar arrangement. There is a section about the state’s history and settlement, and the information found there often explains why you will or will not find a record. For instance, Oregon probate records are among the oldest records in the state, and they go back to the early 1840s when courts had not been established. The wealthiest man in the territory died without a will, and his huge herd of cattle and horses were without an owner. As part of the process of establishing a court to handle the legal disposition of his property, a provisional government was established.

The second section includes a summary of the major archives, libraries, and societies. For John Eppinger and Baker County, it’s clear that no major library or archive exists in Baker County. The research, however, may have to be done onsite. Fortunately, the Oregon State Archives maintains an “Oregon Historical County Records Guide,” an online inventory of county courthouse records.

The third section includes information about the major genealogical resources. We learn there that Baker County’s first death records would have been recorded in the early 1900s. That’s too late for John Eppinger.

Since probate records date back to the beginning of the state, it’s possible a probate for John Eppinger could be found. The “Oregon Historical County Records Guide” needs to be checked to see what records are held at the Baker County courthouse.

For newspapers, the University of Oregon in Eugene has the largest collection of newspapers in microform. Their newspaper collection also might be digitized.

If we were using the “hop and skip around” method, we could spend a lot of time looking for something that isn’t there. The NGS Research in the States books provide useful information that helps us avoid wasted time.

The *FamilySearch Wiki* has been used in other parts of the course, and it proves to be also useful for this research. There are several promising links.

- [Ancestry's Oregon, Wills and Probate Records, 1833-1963](#),
- [Probate Records available through the Oregon State Archives](#)
- [Oregon State Archives Probate and Estate Records Index](#)

- [Oregon State Archives Guardianship Records](#) (same link as above, but listed separately on *FamilySearch* Wiki)

The newspaper section lists several free sites including *Chronicling America* and one called *Historic Oregon Newspapers*. Those sound promising.

Watch this video example of Step 3: Identify records and sources. This is for instructional purposes only—please do not do your own research on the people referenced in the video.

Steps to Develop a Research Plan

1. Develop a research question
2. Analyze starting point information
- 3. Identify records and sources**
4. Create a detailed and efficient research plan



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Step 4: Create Your Research Plan

Your research plan should be detailed and efficient. Our research question is “When and where did John Eppinger, who lived in Baker County, Oregon in 1870, die?”

What records would have the answer?

We have already identified what record groups could provide an answer to the research question: vital, probate, land, cemeteries, and newspapers. And we have established that there will not be a death record. There may be a Baker County probate. There may be a newspaper obituary.

Where are the records located?

Probate case files are in the Baker County courthouse. That means someone needs to visit the courthouse to locate the records. While we didn't find information about the Baker County memorials on *FindAGrave*, it's possible we might find a memorial that shows his death date. Baker County newspapers may be included in the Library of Congress's *Chronicling America*'s newspaper collections.

Which records can be accessed easily?

Cemetery records are easily accessible through *Find A Grave*. That would be the first search.

Baker County newspapers may be included in the Library of Congress's *Chronicling America* newspaper collections. Search this second.

Probate case files are in the Baker County courthouse. That means someone needs to visit the courthouse to locate the records. Choices for that research include writing or telephoning the Baker County Clerk for an index search, hiring a local researcher, or making an on-site visit.

It is all in the details.

What would an actionable research plan look like? You need your plan to be detailed so if you put it down, you can pick up right where you left off when you have time to do additional research.

1. Check *FindAGrave* (www.findagrave.com) for John Eppinger buried in Oregon who died 1870-1880.
2. Search *Chronicling America* (<https://chroniclingamerica.loc.gov/>) for an obituary for “John Eppinger” 1870 to 1880 in Oregon.
3. Search *Historic Oregon Newspapers* (<https://oregonnews.uoregon.edu/>) for an obituary for “John Eppinger” 1870 to 1880.
4. Search Baker County Courthouse probate records for the estate of John Eppinger, died 1870-1880, but search index through 1900 for estates that were probated later. (1995 Third St., Baker City, OR 97814).

Watch this video example of Step 4: Create your research plan. This is for instructional purposes only—please do not do your own research on the people referenced in the video.

Steps to Develop a Research Plan

1. Develop a research question
2. Analyze starting point information
3. Identify records and sources
- 4. Create a detailed and efficient research plan**



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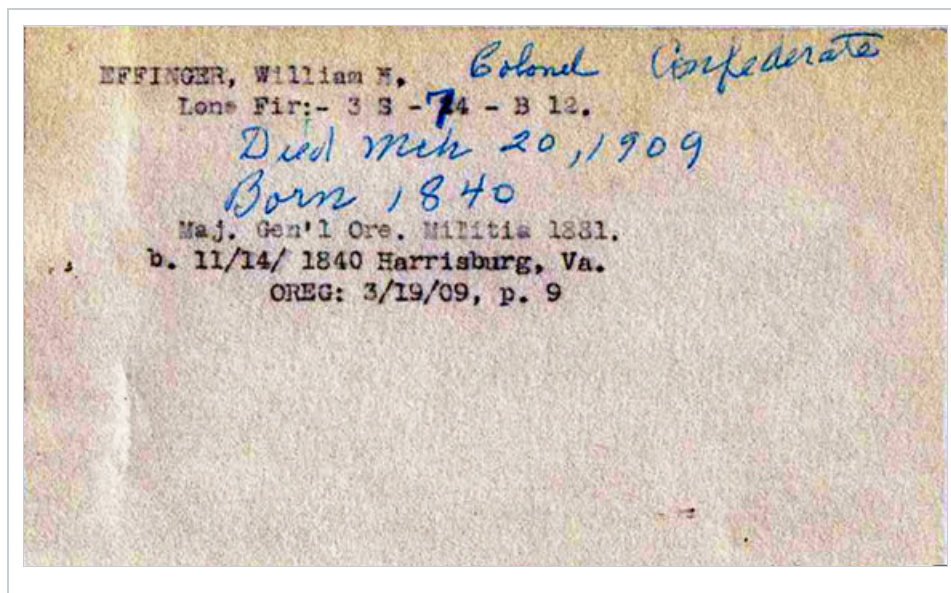
Research Plan for Parentage of Sarah Lefler

Research Plan Practice Exercise

This card for Colonel William M. Effinger is in a "Civil War Veterans Who Lived in Oregon" manuscript file at the Genealogical Forum of Oregon in Portland. Spencer Leonard, the creator, was a member of the Sons of Union Veterans of the Civil War, and spent the greater part of his life recording information about Civil War soldiers. Few of the soldiers in his file served in Oregon units, but they lived in Oregon at one time or another.

Leonard's sources included cemetery records, newspaper articles, Grand Army of the Republic (G.A.R.) post records, the 1890 Veterans Census, and anything else that he found with information about Civil War veterans.

Regarding the "Lone Fir" and "OREG" sources cited on the following card, Lone Fir Cemetery is the oldest cemetery in Portland, Oregon. OREG is short for the name of the *Oregonian* newspaper, a newspaper published in Portland, Oregon.



Discussion 9: Research Plan Practice: Share Your Plan and Brainstorm

Take some time to review the card provided and the information items contained therein, then go to the discussion board and share your ideas with your fellow students.

Discussion 9: Research Plan Practice: Share Your Plan and Brainstorm

Using the index card for William M. Effinger:

1. Create a research question. Evaluate the question against *Genealogy Standards* #10.
2. Identify what you know. How do you know it? Do you need to verify any of the facts? Are there any discrepancies?
3. Brainstorm the sources you could use to answer the question. Evaluate those against Standard 12 (Broad context), Standard 13 (Source-based content), and Standard 14 (Topical breadth).
Hint: websites like *Fold3*, *Ancestry*, *FamilySearch* are not sources – they are repositories.
4. Prioritize your sources. Review Standard 15 (Efficient sequence).

This is a thought exercise only—do not execute your research plan.

Summary of Lesson 1

In this lesson, you learned what makes a research question effective. You learned about the steps required to develop a logical and efficient research plan and we walked you through an example. Then you were able to take an actual document (the Effinger card) and use what you learned to create a research question and develop a research plan.

Apply these skills to your own research. Try it with a simple research question—break down larger projects into smaller pieces. The more you practice following these steps, the more effective and efficient your researching will be!

Lesson 2: Research Logs and Research Notes

Overview and Objectives

In the last lesson, we learned about developing strong research questions which can lead to an executable research plan. Now, we are finally ready to execute the research plan! When we research, best practices include using a research log and proper note taking. We will explore *FamilySearch* in more depth to make sure you know what is available and how to access it, all with the goal of familiarizing yourself with research logs and note taking.

One of the best tools for an efficient researcher is a **research log**. Have you ever been looking for someone in a census and thought to yourself, "Haven't I done this before?" I know I have. Our brains are simply not capable of remembering all our research. We need to write down what we do so we can avoid repeating it.

Successful research also involves taking good **research notes**. Have you ever noticed that you re-read the same deed five times? Have you ever wondered why you couldn't find the answer to your research question? By the end of this lesson, you will have an effective recording strategy and learn how it can help you analyze your sources and overall research plan.

Learning Objectives

Upon completion of this lesson, you should be able to:

- Understand what research logs are and how to use them
- Improve your research note-taking skills
- Identify relevant genealogical resources using the *FamilySearch* catalog
- Use browsable record collections
- Create a research log

Reading Assignments

- BCG. *Genealogy Standards*. 2nd ed.
 - Standards #25-27, 35-36
- Powell, Kimberly. *The Everything Guide to Online Genealogy*, 3rd ed.
 - "A Research Log is essential," pp. 24–25
 - "Taking Good Notes Will Improve Results," pp. 25–26
 - "Document Your Findings," pp. 31–33
- Mills, Elizabeth Shown. "[Skill building: Producing Quality Research Notes.](#)" *OnBoard* 3 (January 1997): 8.

Optional useful reading material

- Ingle, Cyndi. "[Research Notes, Forms & Templates.](#)" *Cyndi's List of Genealogy Sites on the Internet*.
- Szucs, Loretto Dennis and Sandra Hargeaves Luebking, eds. [The Source: a Guidebook to American Genealogy](#). 3rd ed. Provo, UT: Ancestry Publishing, (2006).
[This book, also available as a print book, includes sections explaining many sources.]

The Genealogical Proof Standard and the Research Log

As a reminder, this table shows a simplified version of the GPS.

1. Reasonably exhaustive research
2. Source citations
3. Analysis of findings
4. Resolution of conflicts
5. Write up the findings

A research log will help you see if you have done reasonably exhaustive research (step 1 of the GPS). The log might highlight some gaps in your research. Your log should also include source citations to records where you found information and sources where you did not find evidence (step 2 of the GPS). Your research notes are where you analyze your findings and resolve conflicts (steps 3 & 4 of the GPS). These notes can be in your research log or in a different document. All of this is helpful when you are writing up your findings (step 5 of the GPS).

Genealogy Standards does not address using research logs, per se. Research logs are a tool to improve your efficiency as a researcher.

What is a Research Log?

A research log is exactly what it sounds like—it is a place where you log your research. How you log your research can vary.

Research logs can be pre-printed forms that you download, free-form computer tables, spreadsheets, or even an Evernote template. Some people log their research in a research report. The format is up to you. For a list of downloadable forms, see the "[Research Notes, Forms & Templates](#)" section in *Cyndi's List of Genealogy Sites on the Internet*. In addition to these recommendations, here is a link to [Thomas MacEntee's research log](#) which is in Excel.

You can decide for yourself how to structure your research log, but the basics would be the who, what, where, when, and why.

- **Who** is the subject of your research? You might also list known associates like a spouse, siblings, children, parents or neighbors.
- **What** record are you researching? The **name of the source** is crucial. Remember, the website is not the source. The record is the source. It's like a situation with a brick and mortar library, courthouse, or archive. The building has many rooms where you may find land records, vital records, or probates with information about your ancestors. The building isn't the source. The record that you hold in your hand is the source. You need a **citation to the source**. It's much easier to create the citation before you go on to the next record. At this point in your genealogy journey, citations may not be "perfect." That's okay. Make sure you record the name of the source and where and when you found it.
- **Where** is this record located? If you are researching in person, this is where you put the name of the repository. If you are researching online, this is where you put the name of the website.
- **When** are you conducting this research? Track the date you do the research.
- **Why** are you conducting this research? In the heading, you might include your research questions to keep you focused.
- Plus—carefully record your research results! As you read through the source, **make a note of what you find or don't find**. This note section is like a journal, and it's where you include information about what the source tells you. If you don't find anything, include that as well. When you search for something and you don't find it, we call that a "negative search." If you don't record your negative findings, you will be doomed to repeat the search of that source.

Three Research Log Examples

Below we have three different examples of real research logs created by three different genealogists. There are different levels of complexity and different choices in terms of column headings and the way they capture the data. Look at each example and see which one resonates with you.

Example 1: Simple Research Log

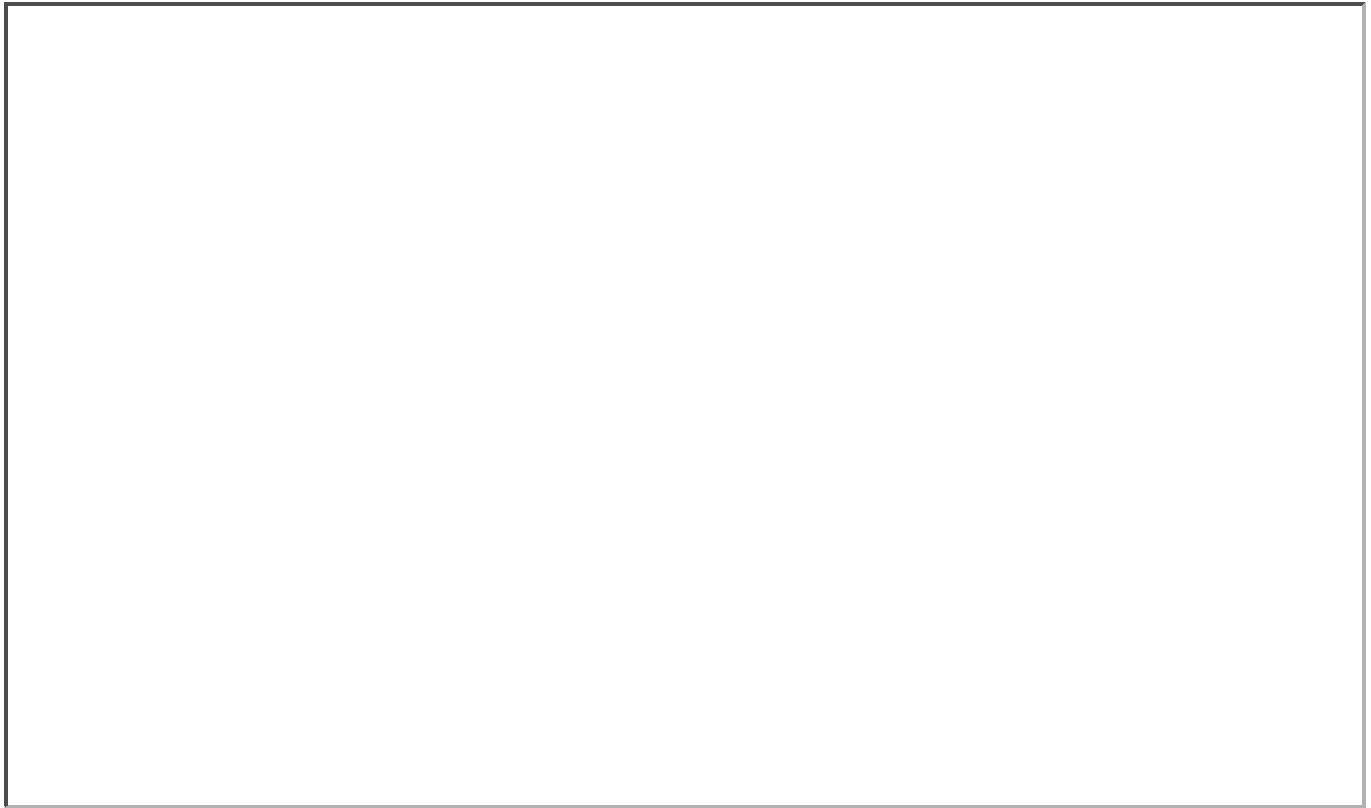
Here is an example of a simple research log. This could easily have been done in your word processing program. In this case, the genealogist was logging the results of their research into deeds in Marion County, Oregon.

Marion County, Oregon, Deed Research					
Log for Joseph Delard					
29 November 2017					
Oregon, Marion County Records, 1849-1976					
https://www.familysearch.org/search/collection/2071970					
Deed index--direct 1855--1873, Vol. 1, A--V					
Note: Time ran out before the deeds could be read. To Do Later: read deeds					
Grantor	Grantee	Instrument	Date	Vol	Description
Delor, Joseph & M.	Phillip O'Reiley et al	S.W.	13 Oct 1855	1: 151	320 acres
Delore Joseph & M	Bozille Delore	S.W.	29 Jan 1856	1: 2583	160 acres
Delore Basile & L	Jos. Delore	W	30 Jun 1857	2: 70	100 acres
Delore Joseph & Mary	C Gardipie	W	30 Jun 1857	2:71	250 acres
Delore Jos. & Mary	Phillip O'Riley et al	W	14 Jan 1858	2:251	320 acres

This researcher included the following:

- **Who:** Joseph Delard
- **What:** Direct deed index for Marion County, Oregon
- **Where:** *FamilySearch*. A link to the collection is provided.
- **When:** 29 November 2017. This is the date the research was conducted.
- **Why:** This particular log does not specify why this research is conducted, but it looks like this could be a part of a larger project.
- **Results:** This research log lists the deeds that were found in the index, including the grantor, grantee, number of acres and where to find the actual deeds. The results also note additional action items, i.e., "To Do Later: read deeds."

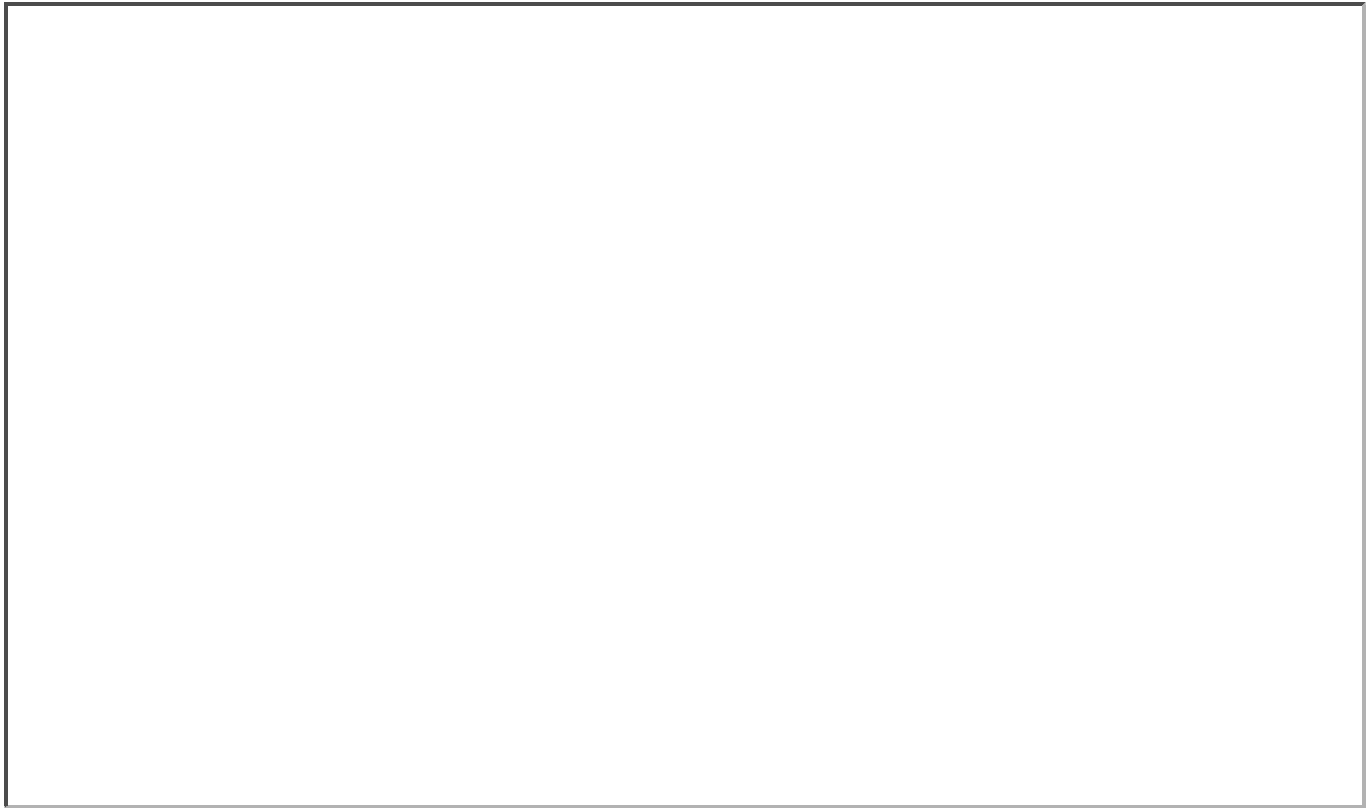
Example 2: Research Log in Excel



Here is an example of a research log that was created in Excel. This researcher included the following:

- **Who:** See "Research Subject" in header and column "Person"
- **What:** The columns "Event," "Event Year," and "Citation," cover the answer to what. Notice how the citations are completed in the research log. As you look at the record, you record what it is you are looking at. This way, you never need to re-craft the citation.
- **Where:** The "URL" column lets you know exactly where to find the record. For records that were not found, the researcher noted the website.
- **When:** Column "Research Date"
- **Why:** The research objective is listed at the top of the research log
- **Results:** This genealogist used the research log to note if records were found or if they searched for a record and it was not found. The researcher's notes were contained in a report. This research log was appended to the report.

Example 3: Colorized Research Log



Here is an example of another research log created in Word. This researcher used color coding to distinguish between different locations. They use the “Doc/File #” column to assign a number to each digital image in their computer filing system.

- **Who:** Column titled “Searching for (include individual ID)”
- **What:** Columns “Title/Author/Record/citation,” and “Time/Age” Year,”
- **Where:** Column “Repository/call#/URL”
- **When:** Column “Date searched”
- **Why:** The research goal is listed at the top of the research log
- **Results:** Column “Notes” and “Doc/File #”

These examples show you how different researchers utilize research logs. In these cases, by logging what sources they searched they can avoid repeating these searches in the future. In addition, when they write up their research in a client report or in a proof argument, they have enough information to craft citations and document where they did and did not find evidence.

FamilySearch Example: Lewis Clephane

The search for information about Lewis Clephane illustrates how *FamilySearch* can be used. In the last lesson we learned about creating a biographical sketch to summarize known information. Note this biographical sketch includes citations so we can remember where we found this information. Also notice how one footnote can hold multiple citations.

Known Facts

Lewis Clephane, son of James and Anne (Ogilvie) Clephane, was born on 13 March 1825 at Washington, D.C.¹ He married on 9 October 1862 at West Haven, Annie Maria Collins, daughter of Simeon and Cynthia (Painter) Collins.²

Go to *FamilySearch.org* and login to your free account. Click on the “Search” tab and then on the drop-down menu click “Records.” Plug in the name Lewis Clephane and what do you get? I got almost 3,000 results.

At this point, there are two avenues a researcher can take. One is to click on each link, read it, and then go on to the next link. The problem with doing that is the research becomes haphazard and disorganized. The other avenue is to develop a research question and a research plan,

execute it, and use a research log to keep track of your results. "Search" is the first method. "Research" is the other method. The search approach is quick, but it's one that is repeated over and over and over because the information is not recorded.

You already know what is the right thing to do! With an uncommon name like "Lewis Clephane," you can very easily plug and search, but let's walk through an example following the proper steps.

Research Question

Let's say we are interested in learning when and where Lewis died. A good research question might be: "When did Lewis Clephane, son of James and Anne (Ogilvie) Clephane, who was born on 13 March 1825 at Washington, D.C., die?" We saw an *Ancestry* hint that suggested he died in Washington, D.C. in 1897. Let's see if we can find some evidence to corroborate this hint. The best evidence would be in original sources with primary information.

Research Plan

You have used the *FamilySearch* Wiki to find likely sources, but have you ever tried using the *FamilySearch* catalog? This is particularly helpful if you know the location where your research subject lived. Since we know that Lewis lived in Washington D.C., let's see what *FamilySearch* collections there are in Washington, D.C. that might have records pertaining to his death.

Log in to your free *FamilySearch* account. Click on "Search" then "Catalog." Here you can search the catalog by place, surnames, titles, author, subject, key words, and film number. We are interested in seeing what is available for Washington, D.C. so in the place search box type, "United States, District of Columbia." Click the search button.

There are so many options that come up for the District of Columbia. Which ones would likely contain information that pertain to deaths? Bible Records? Obituaries? Probate records? Vital records? There are many collections that could contain information you want, but let's just focus on the category of Vital Records.

Because we are looking for when Lewis died, we can skip over any collection that pertains to birth or marriage. That leaves the following options:

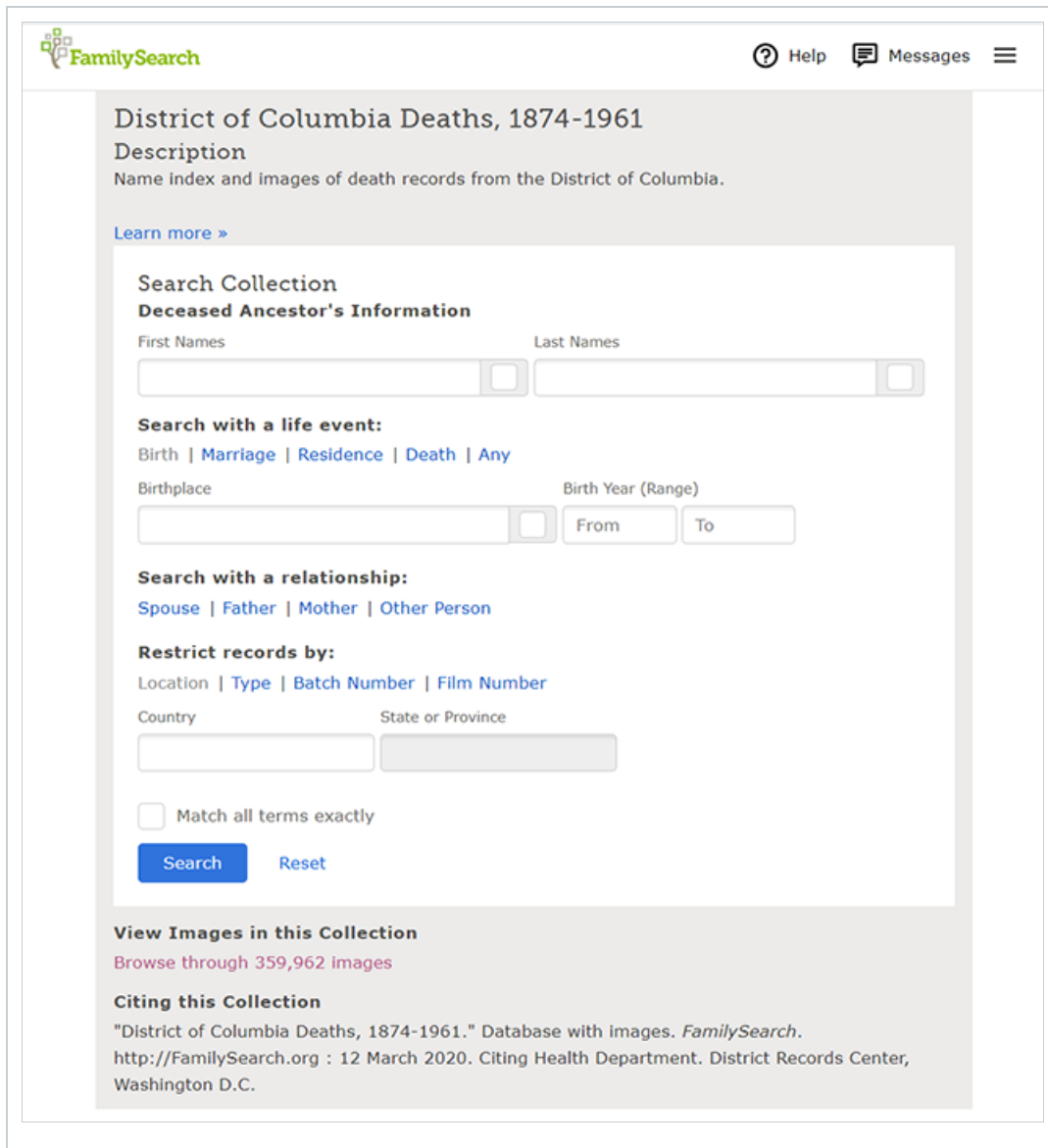
1. "Daily National Intelligencer: Washington, District of Columbia marriages and deaths notices, January 1, 1851 to December 30, 1854" by Wesley E. Pippenger. Call no. 975.3 V2
2. "District of Columbia death records August 1, 1874 to July 31, 1879," by Wesley E. Pippenger
3. "District of Columbia deaths, 1874-1959," District of Columbia. Health Department.
4. "Interments, 1855-1874; death certificates, 1874-1931; index to (1) interments, (2) death certificates, (3) "foreign" death certificates, 1855-1949; stillbirth certificates, 1874-1964 (District of Columbia)" District of Columbia. Health Department.
5. "Marriage and death notices from the National Intelligencer (Washington, D.C.) 1800-1850," by George A. Martin

Where do we start? It looks like #1 and #5 would not cover the years in which we are interested. It looks like #2 would be a derivative source, which is a source created from prior sources, and not the right year. It looks like #3 and #4 might be original sources since the author is listed as the Health Department. Remember that we prefer original sources. Let's add them to our research plan.

Conducting and Logging Research

If you click on either #3 or #4, it takes you to the information page for the collection. It gives you some more information about where the originals are located, that these certificates are loose papers, in other words, these are not in bound volumes (that is on the information page for #4).

Written in red and bold is, "District of Columbia Deaths are available online, click here." If you follow that link it takes you to this page:



FamilySearch Help Messages

District of Columbia Deaths, 1874-1961

Description
Name index and images of death records from the District of Columbia.

[Learn more »](#)

Search Collection
Deceased Ancestor's Information

First Names Last Names

Search with a life event:
Birth | [Marriage](#) | [Residence](#) | [Death](#) | [Any](#)

Birthplace Birth Year (Range) From To

Search with a relationship:
[Spouse](#) | [Father](#) | [Mother](#) | [Other Person](#)

Restrict records by:
[Location](#) | [Type](#) | [Batch Number](#) | [Film Number](#)

Country State or Province

☐ Match all terms exactly

[Search](#) [Reset](#)

View Images in this Collection
[Browse through 359,962 images](#)

Citing this Collection
"District of Columbia Deaths, 1874-1961." Database with images. *FamilySearch*.
<http://FamilySearch.org> : 12 March 2020. Citing Health Department. District Records Center, Washington D.C.

Type in the name Lewis Clephane and you will see the following two results:

1. Lewis Clephane, who died 12 Feb 1897
2. Edith Clephane, wife of Lewis Clephane, who died 27 Jul 1919

Since these are database entries of the original records, they are considered derivative sources. On the right-hand side there is a notation that images are available, but only if you are at a Family History Center or a *FamilySearch* affiliate library. We will need to make a note to go there to view the original death certificates.

The derivative record did confirm what we saw in our *Ancestry* hint—that Lewis Clephane died in Washington, D.C. in 1897. It also provides the name of a cemetery where he is buried—Glenwood Cemetery. If you go back to the *FamilySearch* catalog under the category of “Cemeteries —Indexes” there is an entry for “District of Columbia, Glenwood cemetery records, 1854-2013.” Let’s add this to our research plan. Now that we have a cemetery and year of death, let’s add *FindAGrave* to our research plan to see if there is an image of a tombstone and do a search of newspapers for an obituary.

This example demonstrates how your research plan keeps evolving with every record you find. See how a [completed research log](#) might look for this segment of research. In the end, we had a vital record, will, tombstone image, and church record that all provided evidence of Lewis Clephane’s death. This research log is missing dates of research, which in retrospect would have been helpful for searching for computer emails and files.

In this video I walk you through the steps outlined above as well as show you some other tips for the *FamilySearch* website.

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¹For parentage and birth, Walter C. Clephane, "Lewis Clephane: A Pioneer Washington Republican," *Records of Columbia Historical Society* 21 (1918): 265. For death, District of Columbia, death certificate no. 112178 (1897), Lewis Clephane; D.C. Archives, Washington. Also, *Find A Grave*, database with images (<http://www.findagrave.com> : accessed 12 January 2017), memorial 10220885, Lewis Clephane, Glenwood Cemetery, District of Columbia; gravestone photographed by Tom Clephane.

²For marriage, West Haven, Connecticut, marriage intention, license and return (1862), Clephane-Collins; West Haven Vital Records Office, West Haven, Connecticut. For parentage, First Congregational Church (Westfield), "The publick [sic] records of the church at Westfield [Massachusetts], 1679-1836," p. 499, Anna Maria Collins baptism (1836).

Self-check Activity: Research Logs

Let's say we are researching Richard Hawkins. Based on city directories and census records, we know he lived in New York City, but we want to figure out if he owned land there or if he just rented. Our research question is, "Did Richard Hawkins, who died in New York City on 5 October 1842, own property in New York City during his lifetime?"

Our basic biographical sketch for Richard is as follows: Richard G. Hawkins, born about 1795, married Sarah Hicks in 1822 in New York City.¹ Richard died on 5 October 1842 in New York City.² This gives us information on location and dates.

Our research plan is simple. We want to search New York City grantee and grantor indexes for Richard Hawkins. They are a part of the collection titled, "New York Land Records, 1630-1975" (<https://www.familysearch.org/search/collection/2078654>).

HINT: use the following entries. These references are written in a waypoints format, which is a different format that is convenient to use for digital collections like these. Just remember that the waypoints can change!

"New York Land Records, 1630-1975" (<https://www.familysearch.org/search/collection/2078654>) > New York > Conveyance index-grantee 1654-1866 D-H > img 603-604, index entries for Richard Hawkins.

AND

"New York Land Records, 1630-1975" (<https://www.familysearch.org/search/collection/2078654>) > New York > Conveyance index-grantor 1654-1866 H-L > img 113-114, index entries for Richard Hawkins.

Check out this video for some hints on searching this collection.

cpe_gn_prin_20_su1_sgreen_M6L2_SelfCheck video cannot be displayed here



Research Log

Fill in the following research log within [this Word document](#) then click below to compare your work with the completed version. Just create a log based on the index—there is no need to review the original deeds for this exercise.

Research Log for Richard Hawkins of New York, New York
FamilySearch Collection, “New York Land Records, 1630-1975” (<https://www.familysearch.org/search/collection/2078654>)
Date: 20 March 2020

[Download the completed research log for Richard Hawkins here as a Word document.](#)

¹ For birth, Queens County, New York, Surrogate’s Court, Richard Hawkins petition for a guardian (1810); FHL microfilm 930,787. In his petition he states he is fifteen years old. For marriage, “Married,” *New-York American for the Country* (New York, New York), 30 Mar 1822, p. 2, col. 5; *GenealogyBank* (<http://www.genealogybank.com> : accessed 11 Dec 2016).

² New York County, New York, Surrogate’s Court, Richard G. Hawkins petition to probate (1842); “New York, Wills and Probate Records, 1659-1999,” *Ancestry* (<http://www.ancestry.com> : accessed 21 November 2016); citing New York County, District and Probate Courts.

Research Notes

In the provided research log examples, the approach to research notes has been different. In the Joseph Delard example, the log noted the deeds that were in the index. There was a notation that the actual deeds still needed to be reviewed. In the DeWitt research log example, notations on whether something was found was the only “note” and the actual notes analyzing the records were in the report.

So, where do we put our notes and what do we include? It is up to you—but there are standards to guide you. If you have not yet read *Genealogy Standards* #25-27 and #35-36, please do so now. You will see that many of these concepts are familiar from when we discussed transcriptions, such as noting physical characteristics distinguishing between comments and content.

Your notes could include digital images of the record, a transcription, an abstract, a form where you extract information, your analysis of the record, your thoughts on additional avenues for research, a timeline, a table comparing information items, etc. You could put your notes in your research log, in a research report, in a template you use to extract information, in a Word document, or in Evernote. You can find templates for extracting information from census records or extracting information from deeds, etc. This could be a helpful way of taking notes.

The goal of taking good research notes is to reduce the number of times you find yourself looking at the same record. Have you ever found yourself reading the same record over and over again? If you take good notes, then you might not need to.

Look at these two examples and think about which one provides better information:

Example 1	Example 2
1850 census: Found. Lived in GA	1850 U.S. census, Richmond County, Georgia, population schedule, District 73, p. 886 (penned), dwelling 122, family [blank], Robert C Easterling; NARA microfilm publication M432, roll 81.

with family.

In 1850, "Robert C. Easterling" lived in Richmond County, Georgia. His town was listed as "Division 73" *Comment:* this was the only town listed for the entire county. He was likely living in Augusta.

Robert was age 36 (b. about 1814 in South Carolina). Living with him was his apparent wife, "Frances E. Easterling," and daughter, Elizabeth A. Easterling. Elizabeth was listed as 6 months old and born in Georgia. *Comment:* based on daughter's age and birth location, they were likely married in 1849 or earlier and apparently Robert moved to Georgia by 1849.

Also living with them was James T. Easterling, age 27. *Comment:* Possibly a younger brother? More research needed.

Also in the household was, Ann Easterling, age 70 and born in South Carolina. *Comment:* Could this be Robert's mother?

Example 2 provides a lot more detail as well as the researcher's thoughts of what the record implies. Plus, it has a citation so it would be easy to find if you want to go back and see who the neighbors were, etc. It is helpful to capture your thoughts when you look at a record for the first time.

Making detailed research notes when you first find a record is helpful. Although it might seem like you are spending excess time writing down your thoughts and ideas, it could save you much more time down the road.

Discussion 10: Local Repositories

Go to the discussion board and comment on these questions.

Discussion 10: Research Reports and the Standards

You have just read two simple research reports. Evaluate these reports against Standards #62–71 and #74. Please identify **one thing** that does not comply with standards. Why doesn't it comply with standards? What would you do differently with respect to this **one thing** if you were to write this report?

Please identify **one thing** that does comply with standards. Why does it comply with standards?

- If your birth month is January through June, discuss the Effinger Report.
- If your birth month is July through December, discuss the Hendee Report.

Note: You cannot hurt our feelings. Although these reports were initially actual reports-to-ourselves, they have been tweaked to make sure they give you things to critique!

Summary of Lesson 2

In this lesson, you learned about research logs and note taking. Some people include their notes in their research log. Others use a research log simply to record what sources were searched and to offer a quick summary of the result of that search. They keep their notes in a separate document or location.

You explored the *FamilySearch* website in greater detail. You saw how the catalog can also help you identify sources to include in your research plan. We walked you through the research log and note-taking for Lewis Clephane and you created your own research log for Richard Hawkins.

You should be able to see the connections between research planning, research logs, and note-taking. If you do not already use research logs as a part of your current practice, it may take some time getting used to incorporating them into your research. Again, try these tools on small projects to get the hang of using them. Try different research log formats to find the one that works best for you.

Overview and Objectives

Now that we have learned about research planning, research logs, and note-taking, let's see how these tools and techniques can be used in a research report. Writing research reports is not just for professional genealogists—research reports are a great way to capture and record your personal research as well.

Learning Objectives

Upon completion of this module, you should be able to

- Identify the standards for a research report
- Identify the components of a research report
- Read a research report and evaluate whether it would meet standards

Reading Assignments


- BCG. *Genealogy Standards*. 2nd ed.
 - Standards #62-71, 74.
- Mills, Elizabeth Shown, "[QuickLesson 20: Research Reports for Research Success](#)." *Evidence Explained: Historical Analysis, Citation & Source Usage*.

What is a Research Report?

A research report is a report about a specific research segment and is the implementation stage of the research plan. It focuses on the records that were located and the ones that weren't. It includes an analysis of those records and how they answer or don't answer the research question.


Research reports can be short and report on just one source. They can be long and include numerous sources. They can report on one day's worth of research or a twenty-hour research segment. They are written at the end of the research segment, and a new report is started when the research picks up again.

Research reports are not just for professionals! It is a great way to conduct research on your own family. I write reports to myself all the time. When you are researching different ancestors, they can get confused in your mind, especially if you are like me and fit your research into an hour or two here and there. A report is a nice format to remind yourself what your research question is, what sources you checked, what your results were, and what you have left to do.



Question: Do all research reports have proof arguments?

Answer: No! Let's talk about the differences between a research report and a proof argument.



According to the glossary of *Genealogy Standards*, a proof argument is, "a documented narrative that explains why a genealogist's answer to a complex genealogical problem should be considered acceptable and which may either be a stand-alone product (like a case study, journal article, or report) or appear within a chapter, family history, or other genealogical work in print, online, or elsewhere." The key part is that a proof argument is a documented narrative. If you are working for a client, that proof argument would be in a client report. If you want to get it published in a genealogy journal, then you would write it up as an article. Or, if it is just for you,

then you could have it in your research notes tucked away in a file cabinet.

Keep in mind that not all research reports are about “proving” something. Let’s say you go to a library to research the obituaries for your ancestor and you write up your research in a report. No proof required. If a client hires you to find land purchased by people with the surname “Thompson” in Berks County, Pennsylvania from 1750-1850, no proof argument would be required. A research report is simply reporting on a segment of research and it may or may not include a proof argument.

There are few examples of research reports on the Internet. The following sample reports on the Board for Certification of Genealogists’ website, [Genealogical Work Samples](#), are not presented as perfect models, but they illustrate different types of reports.

- Mills, Elizabeth Shown, CG, CGL, FASG. “[Samuel Witter \(1787-1876\) and the War of 1812](#).” (2012/2017)
- Ruffner, Malissa, CG. “[Pierre Laporaille \(m.1819\)](#).” (2012)
- Lennon, Rachal M., CG, FASG. “[Analysis of the men who served with Jonathan Turner...](#)” (2006)
- Lenzen, Connie Miller, CG. “[House history of 5726 North East Cleveland Avenue, Portland, Oregon](#).” (2006)

Items to Include in a Research Report and Template

Standard #74 in *Genealogy Standards* lists 10 parts to a research report. If you have not read that Standard, please do so now.

Many genealogists make a report template, save it on their computer, and “copy” it at the beginning of each new research project. As they conduct research, they fill in the report template.

[Click here to download a basic Report Template](#).

An explanation of each template element

Identification of the Researcher

This can be done in a letterhead with name and contact information.

Date

To

This lets the reader know who the intended audience is, no matter how far removed in time or geography the actual reader may be. For personal research indicate where the report will be filed. Example: “To the Eppinger File.”

Goal or Objective

This is a brief one or two sentence statement about why the research is being done. What question are you trying to answer? What information are you trying to find?

Background Summary

This “starting point” summary reports information that was known to the researcher (or provided by a client) before research began.

Restrictions or Limitations

This includes restrictions of time, money, or records availability that would influence the scope of the work. This could be a county with burned records, amount of time available before the family reunion, or personal or client budget. It alerts the client or other readers to the limitations under which the research was conducted.

Resources Used

This could include “bricks and mortar” repositories visited, such as a library or historical society or an office in a county courthouse or a state

archive. It should also list the names of online websites that you used.

Itemized Research Findings (sometimes called “Research Notes”)

This is the meat of the report—the record transcriptions, abstracts, and analysis. Here you discuss what the records mean in historical context. Negative results should be recorded. Any proof arguments are discussed here as well. Everything should be documented with source citations in footnotes.

As a caution, this section is not about the path you took to find the records. Most readers will not be interested in “First I went to the courthouse, which led me to the library and the librarian suggested the archives, and that’s where I found the Civil War diary.” You perform the research, but you are not a character in history being discussed.

Summary of Research Findings

After the research is conducted, include a succinct summary of the research results. The summary is to be a paragraph or two that summarizes the Itemized Research Findings. Since you cite your sources in the itemized research findings section, you do not need to cite sources in this section.

Further Recommendations (Research Suggestions)

This section lists the “next steps” of the research if it is to be continued. It is the beginning of the initial research plan for the next phase, no matter who undertakes it. Detailing here which records will be sought in which repositories will pay off when resuming the research. Compare the usefulness of “Find Joe Johnson’s date of birth” to “Determine Joe Johnson’s date of birth.” Check XYZ county birth registers, years 1886–1898, at XYZ county clerk’s office. Check *FamilySearch* to see if they have been digitized and put online.”

Headers and Footers

Many genealogists include information such as “page X of Y” and a project name and/or author’s name. If pages become separated or clients copy only parts of the report, it will be apparent that it was part of a larger report.

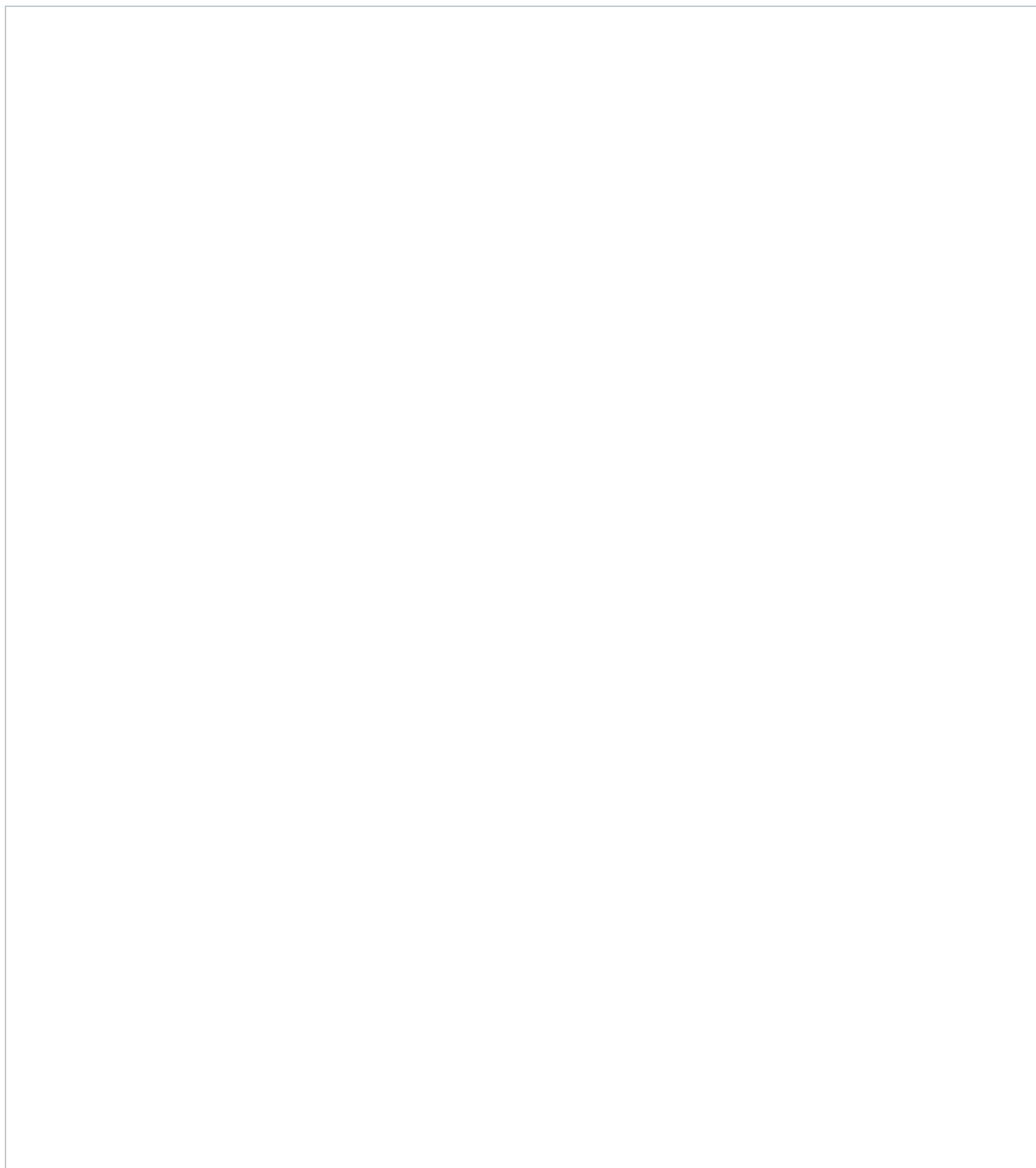
Documents (source cited on front)

Document copies, scanned images, and images from websites can be included in an appendix with the source citation of each on the front of the document page. When you attach documents, reference them in the body of the report with a document number.

cpe_gen_prin_20_fa2_sgreen_research_reports video cannot be displayed here

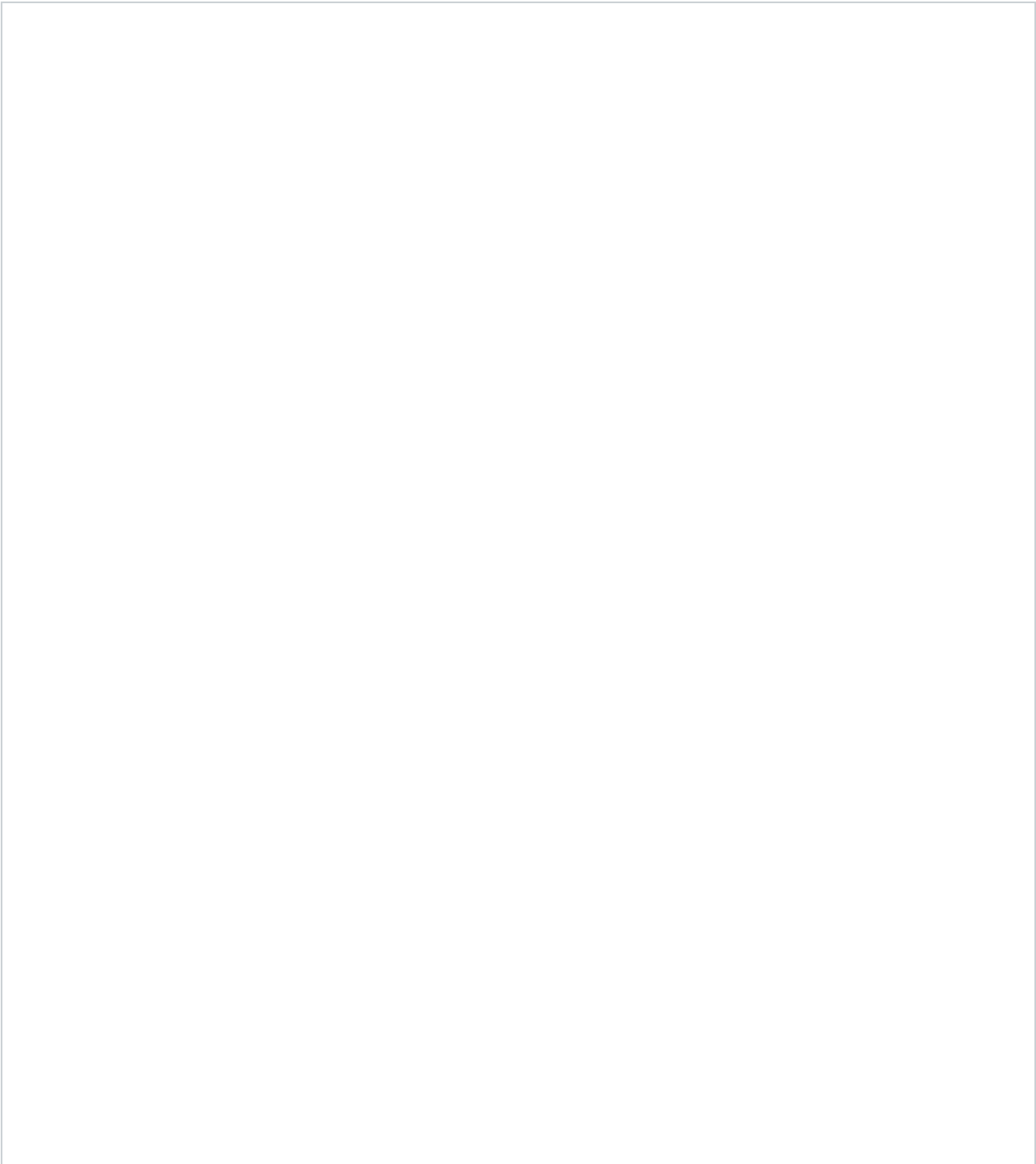
Effinger Report:

In Lesson 1, a card for William M. Effinger was the basis for a research plan. After the research was carried out, a report was written. This report is an example of a brief research segment for a personal project. It includes analysis explaining the death date discrepancy. Without that written analysis, the researcher would need to repeat the analysis over and over.



Hendee Report

This is another report that was created for a personal research project. It includes searching typical town-level records to help identify potential birth families.



Discussion 10: Research Reports and Standard 74

Read through both reports. Do you think they meet *Genealogy Standards* Standard #74? After you read the reports, go to the discussion board.

Discussion 11: Genealogical DNA Testing Experience

Share your experiences about DNA testing by answering the following questions. Try to engage your fellow students by reading at least two of their posts and responding to them with a thoughtful and

thorough reply.

1. Have you tested your DNA? If so, what type of test or tests have you done? Which company or companies have you tested with?
2. If you have not taken a DNA test do you have a genealogical question or problem in your research that you think DNA may help solve or provide evidence towards? If so, briefly describe the question or problem.
3. Have you asked a known family member to take a DNA test for you so that you could discover more about your genetic genealogy? If so, how did you approach him or her? Was it necessary to educate that person on the DNA testing process before he or she took the test? Without using names or identifying information, share your experience.
4. Have you ever asked a stranger to take a DNA test because you believed its results would add evidence in a DNA project or case you were working? If so, how did you approach that person? Was it necessary to educate the stranger about the DNA testing process? Without using names or identifying information, share your experience.
5. If you have never asked someone to take a DNA test (family or stranger), how would you handle the situation?

Module Summary

During this module, you learned about genealogy standards. These standards provide guidance for doing quality research. The ultimate standard is the Genealogical Proof Standard. A simplified summary of the five steps are

- Conduct reasonably exhaustive research
- Create accurate source citations
- Analyze sources
- Resolve conflicts
- Write up the findings

You learned that reasonably exhaustive research means more than creating an online tree or consulting a series of indexes. For quality work, research should be in original sources created by people who had first-hand knowledge of the information being recorded.

Several free online websites were introduced where digital copies of original sources may be found. You started your journey towards creating source citations for every source you used. You learned about analyzing evidence and including legal and historical context. You touched on resolving conflicts between sources and practiced several techniques for recording information from these sources.

In the final module, you will learn about the standards and ethics involved in genetic genealogy. Continued success!

Boston University Metropolitan College