

Writing As You Go is the W.A.Y. to Go for Research Reports

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From formulating the research question through research planning and execution, the process of “writing as you go” (WAYGo) makes you a more efficient researcher when creating reports. I created this term in 2009 to describe a process using research standards. Adapt for your own use.

STANDARDS FOR WRITING

- Genealogical Proofs: 58–61
- Assembled Research Results: 62-73
- Special-Use Genealogical Products, Standard 74, Reports

RESEARCH REPORT SECTIONS—for every research goal whether your own or for others
(See BUILDING THE REPORT below for the process using these sections.)

1. Identification of the writer, intended recipient, and date prepared
2. Subject or focus of the paper
 - Name(s) of the focus of the research with identifying date and place
3. Summary of problem background and context before research
 - Any narrative description of the problem
 - Citations to documents received before the project start
 - Pedigree charts, family group sheets, or reference to established online trees
4. The research goal or objective
 - Questions should be one of relationship, identity, or event.
5. Any limitations of resources, records, or time
 - Time & cost limits include authorized client hours or if needed by a certain date.
 - Project scope or format limitations
 - Records limitations includes noting unindexed or partially indexed records, the 1890 census, or records in a foreign language.
 - Access limitations include wait time for ordered documents, repository access including limited hours or source authorization restrictions, or records not publicly held.
6. Identification of repositories or collections used
7. Succinct narrative summary of findings including why the goal was met or not
8. Report notes: sufficiently detailed discussion of positive and negative research, transcriptions, abstracts, findings, analysis, comments, research log, charts, etc.
9. Further recommendations
10. Bibliography of records consulted (Source list) (can act as index to copies provided)
11. Report identification and page number in footer
12. Images and Appendixes: photocopies, charts, graphs, tables, pedigrees, etc.

YOUR NAME
ADDRESS, ETC.

DATE

TO:

Recipient's name
Recipient's address
Recipient's city, state, or email address

SUBJECT:

WHO OR WHAT IS THE SUBJECT OF THE RESEARCH [Name of person(s) who is/are the research target.]

BACKGROUND SUMMARY:

EVIDENCE FROM INFORMATION YOU HAVE AS IT PERTAINS TO THE RESEARCH QUESTION. This could be copied from an email you received.

GOAL:

Focused Research Question

ANY RESTRICTIONS:

Time, repository access, record limitations, delivery format, etc.

REPOSITORIES

WHERE YOU CONDUCTED RESEARCH, BOTH ONLINE AND OFF.

KEY FINDINGS OR EXECUTIVE SUMMARY

[Discussion of the reasoning which addresses whether the research question goal was or was not met.]

RESEARCH NOTES

[Raw notes about each step in the plan or source as you examine them. Transcripts, abstracts and other data collection devices go here along with sources. Discussion and analysis of the evidence. Acts like a Research Log.]

FURTHER RESEARCH SUGGESTIONS

[At the beginning, place your Research Plan here. Be as detailed as you possibly can. Move each item to the Research Notes as you prepare to do it. What is left at the end should be your Further Suggestions along with any new ideas you added during the research process.]

DOCUMENTS PROVIDED

[Citations in Source List or Reference Note format of what was provided with the report, not everything searched.]

IMAGES and DOCUMENTS

Documents, images, maps can be inserted at the end of the report along *with their source citations (reference source format)*

PROCESS SUMMARY

1. Understand the goal
2. Create hypothesis or define a research question
3. Analyze the current state of the problem and summarize it
4. Identify all sources and repositories for information
5. Design plan for accessing and examining
6. Research and collect information
 - a. reading handwriting correctly
 - b. understanding fully the words used
 - c. rendering precisely all data
 - d. placing names, dates, etc. in context
 - e. collect data without bias or judgment
 - f. information source is acknowledged
7. Analyze and evaluate results
8. Write conclusion along with suggestions for continuing

BUILDING THE REPORT

1. Use template with letterhead to record recipient and date. (section no. 1)
2. Record subject, goal, and limitations. (nos. 2, 4, 5)
3. Organize preliminary information and describe the problem. (no. 3)
4. Develop research plan; place in Future Recommendations section. (no. 9)
5. Place planned repositories in Repository section. (no. 6)
6. For each repository, move the next research plan item from Future Recommendations to Research Notes and cite source that is examined. (From no. 9 to 8)
7. Extract information, make comments, record negative research, and change and update research plan accordingly. (no. 8 and 9)
8. Append images to the report when you encounter them; place citations on image pages and in Documents Provided section. (nos. 10 and 12)
9. Insert information in timeline, chart, or other organizational aid.
10. Write narrative summary with footnotes. (no. 7)
11. Insert footer with page number and report ID. (no. 11)
12. Insert appendices and index if needed. (no. 12)

EFFICIENCY TIPS

- Use a template and pull it out before starting. Rename a copy for the current project.
- Use a list of common source citations kept in another document or spreadsheet.
- Track positive and negative research results in the Detailed Notes section / Research Log.
- Don't get distracted: Place side questions in the Future Recommendations section.
- O.H.I.O.: Capture images when first examined, append to the end of the report with citations. This makes for easy consultation during the project.

- Be creative! Let the data suggest how best to organize it.
- Use appropriate presentation techniques.
 - Narratives are the most reader friendly
 - List to present statements in a bulleted fashion
 - Timeline to organize and present data chronologically
 - Charts and Tables to compare and contrast data
 - Map to organize and present data geographically
 - Genealogical Summary in NGSQ or Register style
 - Proof Arguments

BIBLIOGRAPHY

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- Examples of reports, proof summaries and compilations can be found at:
<http://bcgcertification.org/learning/skills/genealogical-work-samples/>
<http://www.historicpathways.com/articles.html>