

## ORGANIZE YOUR RESEARCH, 5 STEPS

By Patricia Law Hatcher, FASG. October 2, 2003

This is not about organizing what you've already found. It's about organizing what you are going to do.

### **What's Your Problem?**

In genealogy we have many problems, too many to work on all at once. We are most likely to find solutions if we focus on a single problem and stick with it until we reach a conclusion, either by finding the solution or by admitting that we can't do any more on it right now.

Be specific and keep a narrow focus. Instead of, "Who was the wife of Samuel Smith?" consider the problem statement, "Did Samuel Smith's wife come from a neighboring family in Scott County?"

Put your problem statement in writing and post it near your work area. Make another copy to stick in your library bag. Use these as reminders to keep you from straying onto other problems.

### **What Do You Know?**

The next step is to review and compile all of the information that you currently have. This may take quite a while, certainly more than you expect, maybe even more than the research itself. Plan for the time. The Dallas Library is open on Sunday from 1 until 5. I get home from church about 11:30. Many times I have thought to myself "I can organize my stuff after church and be at the library soon after one o'clock," only to find myself at 4:30 still collating and analyzing the research I had already done.

No matter how much time this step takes, it can save you much, much more. I know from sad experience. I have searched in the wrong place. I have searched in the wrong years. I have searched for the wrong person. I have searched in records I have examined already. This wasted effort, time, and money could have been saved if I had taken the time for this step.

I usually organize the information in two parts. First, I abstract all the documents I've found thus far and arrange them chronologically. Second, I compile family groups from the information.

### **What Do You Need to Find Out?**

Once you've clearly identified what you know, it's

relatively easy to identify what you don't know. This is not the same as the problem. It is, instead, the specific items that you need to find out. You probably thought of several "need to find" items as you were organizing your prior research.

For example, you may need to find out "Who were the neighbors of Stephen Smith?" "Did any of them have a daughter the right age?" and "Can any of them be eliminated as a potential family?"

### **Where Will You Find It?**

Before you head for to the library or courthouse, prepare a plan for how you intend to go about seeking the answers.

List the types of resources you want to check. For example, to identify the neighbors, you'll want to check census, land, and tax records. Censuses will identify families with eligible daughters. Probates of neighbors may help eliminate possible families.

Check for specific sources to use. Online catalogs for large libraries are very helpful at this stage. Next you need to determine if these resources are going to be available to you at places you plan to research. Do you need to order microfilm from the Family History Library or from the state archives on Interlibrary Loan? List microfilm or book call numbers from online catalogs to save on-site time.

### **What's the Deliverable?**

The term "deliverable," familiar in the consulting environment, isn't usually used by genealogists--but it can be valuable in focusing your efforts. Consultants don't just tell clients their conclusions. They must prepare a report that describes the existing situation, make key observations about it, and recommend future activities--not unlike the report a professional genealogist might make to a client. Often consultants make several such reports during a project.

Likewise, for your problem, merely finding the solution is insufficient. That is not a deliverable. You should bring closure to the problem by preparing a written document that states the problem, describes the research, comes to a conclusion, and suggests further work.

This deliverable will be useful in sharing your efforts with others interested in the research and it will help bring you up to speed quickly the next time you work on this family.