

## Quality Control

It is hoped that by explaining the Quality Control process, researchers will have a better understanding of how to meet expectations. Quality control is not intended to judge a researcher but rather to be sure our clients will be satisfied with the final product. Projects are reviewed by QC after they are seen by the Project Manager. The final check is done because in most cases both the PM and the researcher are deeply connected to the research, QC provides a detached and objective evaluation. In most cases, QC is completed within 48 hours.

Quality control is tasked with the following objectives:

1. Helping ensure CLIENT objectives are met
2. Helping ensure COMPANY standards are met, procedures are followed, and deliverables have a consistent look and feel
3. Helping RESEARCHERS by providing a final editing process

Each project is approached from three different perspectives:

1. Format review
2. Client approach
3. Research review

Within each review section, the QC team is looking at different aspects of the project:

1. **Format Review** — While each researcher might have a slightly different style, all projects must include the following:
  - a. Genealogists.com logo shows clearly on the report
  - b. Client objectives are stated clearly and each one is addressed
  - c. Research results are summarized at the beginning
  - d. Recommendations for future research are provided
  - e. Research process and findings are clearly explained
  - f. Full source citations are provided for the facts within the narrative. These can take several formats, including footnotes or endnotes
  - g. Log/Calendar lists sources consulted during research, both those that are successful as well as those that are not

*Please note: Samples and templates are available on the company website at:*

*<http://www.genealogists.com/researchers/project-deliverables.html>*

*If you are concerned that your preferred formatting will not be acceptable, we will be happy to evaluate it for you.*

2. **Client Approach** – The report is first read from a client perspective. We are looking for:
  - a. Were the clients objectives clearly understood?
  - b. Was each objective adequately addressed?
  - c. Does the report make sense to someone who did not do the research?
  - d. Are there spelling and/or grammar errors?
  - e. Does the report reflect the time and effort invested in the project?
  - f. Does the research leverage the power of our network, i.e., the fact that we have access to almost a thousand archives around the world
  - g. Have we anticipated and adequately answered client questions?
  
3. **Research Review** — The intent is neither to redo the research nor to critique the researcher. Rather QC is charged with ensuring that the research sent to a client will please the client, encourage the client to purchase additional services, and be a source of pride for the genealogist.com brand. Therefore we:
  - a. Look for assumptions that are not supported by evidence or logic
  - b. Check for credibility of sources
  - c. Ensure appropriate research techniques were used
  - d. Consider whether any obvious resources were missed
  - e. Make sure our network of resources was used rather than relying solely on online sources
  - f. Do a standard online search for information on the target of the research.  
*Why? Because it is imperative that the client does not simply search for an ancestor and find something we missed.*
  - g. Spot check research assertions. For example, if a researcher says a volume or file cannot be found, it is likely the QC department will do a double check.  
*Why? Because researchers are human beings who can miss things! It is possible a slightly different search term or another approach will find the needed info. And once again, it is better that the missing piece of info is found by QC than by the client.*

**Things that will immediately return a report to the researcher:**

1. **Sources are not listed** for the facts in a narrative.
2. **Sources are not cited properly.** We will not return a report for a misplaced semicolon. However, ancestry.com is not an appropriate source citation. Here is an online source for citation information: <http://tinyurl.com/6m7tt3k>
3. **Online trees quoted.** Feel free to look, use as a hint, but any information must be verified and sourced. Online trees are NOT a source.
4. **Assumptions.** As researchers, we interpret data. But one cannot make statements without proof. For example, an older man and much younger woman with the same last name are not automatically father and daughter. In reality they might be husband and wife.

5. **No new information.** The project may not be a restatement of the client-supplied facts. At the end of the process, the client should have new information even if it is negative results.
6. **Missing documents.** If a document is central to the research, a reasonable attempt to locate the document will be required. A report will be returned if a researcher claims they could not access a document that can be located at the Family History Library, at FamilySearch, or online. If you need a document and cannot locate it, please check with your PM to see if a member our network of researchers might be able to help.