

Writing Memoirs, Biographies & Family History: The Research & Planning Stage

Jeanette Taylor
The Scribes, Comprehensive Writing Service

You've chosen your nonfiction writing subject: a person, family, place or event. Pause here to consider a few big picture goals. Who will your audience be and what kind of publication best suits them: a blog, website, scrapbook, photo book, e.book (electronic), print-on-demand publication, or a commercial book? What are your personal goals for this project? What do you want to get out of it? Do you have a central character in mind—a protagonist—to deepen reader interest? If so, you'll be digging for information about her as well as your other areas of interest.

You may not be able to answer these questions at the outset, but knowing these things will focus your research. It will also help you start to envision the broader scope of your project, and give you a sense of how much time and resources to invest. If what you want is a blog for family and friends, for instance, you'll engage in different kinds of planning activities than you would for a manuscript for publication.

As you may have already discovered, the sky's the limit in historical nonfiction research. What follows are some thoughts to guide you.

So—let's begin. Your first step is to become the subject expert. For those writing a memoir, you're not off the hook. You also need to do research, including interviews, to confirm facts and dates for the events of your life and the world around you.

Research

The records you want are “primary” documents, the ones generated at the time. The “secondary” material (books and articles written in later years, or even reminiscences compiled by a participant after the fact) is not reliable. So, track down the diaries and letters of the era, or even the books of the time, as your sources.



You might find documents, in your archival search, that can serve as illustrations for your publication. Photo courtesy Cortes Island Museum.

Be wary. Snares and traps await you, even in the primary documents. They too will contain erroneous “facts” that need corroboration. And be prepared to change your mind. You may have started with a preconceived notion that gets called into question by what you find in primary source material. Be open to that. Rein in temptations to leap to conclusions based on slim evidence. The urge is there, because you want to find the answers and race along. Put the brakes on that urge and keep digging. You'll make some surprising discoveries that are far more interesting than the speculative ones. Remember, you're on a quest for the truth. And finally, you need to know your biases. You'll have to work with and around them. Let's say you have leftist leanings. Will that keep you from understanding the perspectives of someone with a different political view?

What I'm saying here is: as a skilled researcher you must be an open vessel, always ready to receive, to question and dig deeper.

In addition to sourcing facts and anecdotes, look for evidence of crisis points and problems. It's these, not the happy tales of success, that make for a good story. Even if your main character is a hero for all time, she faced problems. How she resolved them, and grew with the experience, is what will keep your readers turning the pages. And watch for "telling" details, sensory descriptions that have the power to take your readers back in time. They may, at first, appear to be inconsequential, but descriptions of feelings, sights, sounds and smells are moving. In a journal, for example, an explorer described a river that was littered with boulders glazed over with ice, making them look like crystal balls. It's a rare treat to get such a cogent detail from the mind of a source



from the past. If you're lucky enough to have a living informant (maybe that's you, in the case of memoir), probe for these life giving snippets. "You don't need lots of details; you simply need a few, told with verve," wrote Elizabeth Sims in an article in *Writer's Digest* magazine.

A careful "reading" of old photographs provides clues to personalities and economic circumstances. Pictured here is the Manson Family of Cortes Island. Photo courtesy Museum at Campbell River, # 9358.

As you delve into your research more questions will surface. They'll lead you to dig deeper and the results will add voracity and clarity to your story. Let's say you've discovered that five siblings left their deeply rooted family in Norfolk in the 1840s for the frozen winters of Ontario. Why would so many leave at once? There has to be a story—and there is. An internet search revealed that a massive recession hit Britain's agriculture regions at that time. People left by the shipload in a desperate search for a better life.

In addition to gathering info about an event, person or family, you may need to know what transpired on a national and global scale. You can be sure these things impacted your subject. Knowledge of the social history of the time could add a lot to your narrative. What did people wear, eat, and care about in that day and age? What were their houses and lifestyles like? You may find these details in books (including contemporaneous fiction), in museums, at heritage sites, and in well-researched contemporary documentaries. For late 19th century rural England, for example, see the BBC documentary *The Victorian Farm*. Or how about some of the other great BBC movies, with their excellent period details, based upon classic novels by Charles Dickens and Jane Austen.

What's a Primary Source?

- Diaries and letters (generated by an individual and representing one person's view).
- Census lists (spellings and dates are not reliable, but this is one of the only places you'll find women and children).
- Government documents.
- Directories (spellings are not reliable and women were rarely included until after WWI).
- Maps (remember these are political constructs).
- Voter's lists (only men who registered for the vote are here; no women until after WWI).
- Photos and films of the day.
- Company records.
- Vital statistics: birth, marriage, death, christenings, grave listings.

- Newspapers of the day (which fall somewhere between primary and secondary source material because they're loaded with mistakes, but they do give you a slice of the moment.)

What's a Secondary Source?

- Reminiscences and memoirs aren't primary because human memory is fallible, but they're a great source for telling details, emotion and anecdotes to quote.)
- Books and articles written later.
- Newspapers of a later day. (I recommend you avoid this source entirely!)
- Scrapbooks.

Using an Archives

Newspaper and magazine clippings ("vertical files") aren't primary documents but they're an easy place to get started. Obituaries and articles from the time are of special interest, giving you clues of sources to check. A larger archives may have collected these clippings over many decades.

Check the archives' "finding aides," a summary of large holdings, to narrow your search to the exact file or journal in their voluminous collections.

If you love research it's easy to get sidetracked and stray into unrelated material. A scan of the archives' website (with collection summaries), and a list of specific questions, will keep you on task. Don't try to read everything on site. Skim documents for relevance and make photocopies or photograph them. Does the archives have a microfilm reader that allows you to copy to a flash drive?

If you make notes by hand or on your laptop be wary of misleading typos, or misinterpretations. If you have a copy of the actual document, you've got a reliable source in hand,



on which to make margin notes and highlight the key bits. No matter your method, write the catalogue number on everything: "BC Archives, Mss 203, File 2." (This is especially important if you want to produce a publishable manuscript.)

A visit to a site that's important to your narrative can add charge and descriptive detail to your writing, especially if you're able to go there with someone who can tell you the stories of the place. Seen here is Etta (McKay) Byers on her grandfather's homestead on Cortes Island. J. Taylor photo.

Archivists can be very helpful, but they won't do your research for you. If you push them to do so, you risk losing an important ally.

Keep a notebook just for this project, as a writing reference. It's also handy for your return visit to the archives, as a record of what you've already checked.

Working with Informants or Relatives

You may not get the "facts" from living informants. Human memory is fallible and filtered through the individuals' experiences and mindset. But you'll get some terrific anecdotes and those hard to find telling details to inject life into your narrative. You'll get leads about who else to consult, and maybe some old photographs to copy.

Take time to develop a relationship with your interviewee before you launch into your questions. Start with the easy subjects, moving on to the harder issues later. Sometimes an interviewee will launch into an unexpected topic with passion. If it's relevant let them run with it! For those who give no more than yes and no answers, perhaps your questions aren't opened ended, the kind that call for a detailed response? Or maybe they're nervous. Can you win them over and get them to open up? If not, you probably don't have the right interviewee.

The best way to start an interview is by taking notes. If you find the person is a natural raconteur, ask for permission to tape the session. A small tape recorder is unobtrusive. Choose one you can plug into your computer later for transcription. The sight of a recorder will sometimes intimidate an otherwise chatty interviewee, no matter how small the recorder is. You may have to



stick with note-taking. In fact, it's wise to continue with notes even when you are taping—as a backup.

If your source tells you they can see a certain place clearly in their mind—don't let them stop there. Ask them to describe it to you. This is the stuff you're looking for. Your job throughout is to probe for more.

Choose a place where your interviewee is most comfortable and spend time getting to know her before you start a formal interview. Plan for a session of about forty-five minutes. Longer than that can become taxing. Seen here is Alda Cote. J. Taylor photo.

You should get a signed release for the interview, giving you the right to use the material. Put the date and the interviewee's name on the tape or disk, or better yet, say these details at the start of taping.

Be careful not to judge what your informant tells you, even if you feel it's inaccurate. Your job is to be an active, attentive listener. You want their perspective on the subject.

It seldom works to interview more than one person at a sitting. When you listen to the tape later it's hard to discern who is speaking, and people are rarely as candid in a group. Looking at old photos during an interview is also problematic. They're great memory teasers for a pre-interview conversation, but if viewed during an interview the discussion can be a puzzler to follow later on: "Yeah, the girl on the left was my first...."

It's not necessary to transcribe the whole tape, word for word, just type the pertinent parts and potential quotes. Honour your interviewee by writing it just as they said it. At the same time, find some punctuation devices to deal with the fact that no one speaks as they would write. People often change tact in the middle of a sentence, for instance. There's no need to leave in their false starts in the quotes you use.

If you conduct your interview with notes, it's smart to type them soon after, while you remember details. I like to send the transcript to the person to get their input because it's so easy to make mistakes with spellings and nuances in note-taking.

Maybe your local museum or archives wants a copy of your taped interviews and notes?

The more people you interview and consult, the bigger the following you'll build for your end product. Get everyone's contact info and send them an invitation to your launch.

The Internet as a Source

The internet is a boon for researchers, making a breadth of material available. This is especially so in the history field. The internet can also be a major time robber, casting you into a labyrinth of questionable material. As with any source, it's wise to corroborate the information you find there against written and oral sources.

A Sense of Place

You'll gain a lot by visiting the location where your subject(s) lived and worked, to see, feel and sense these places. Try to get there in person. If you can't, use Google Earth, YouTube, movies and on location documentaries, or websites. Since I've paddled up the Courtenay River, I know that in spring there are wild flowers in the tall grasses along the riverbank and fragrant cottonwood trees. I can add these impressions to my cache of those hard-to-find telling details.

Preparing to Write

Arrange your notes and copied documents in paper files and on the computer under subjects that follow the rough plan for your book: by place, decade, and people's names, for instance.

All those bits and pieces you've collected are like fragments of a china plate that were scattered to the wind. As you fit them together stories emerge. You'll find intriguing characters, conflict, drama and mysteries. Remember, you need conflict for good storytelling. If you're lucky the tales you find may also include a plot. Unlike conflict, plot is not a requirement in nonfiction because we're working with what was, but when you find one—you've hit gold. And, of course, the little cameo portraits you assemble from the shards of the past will lead to more questions. If you wonder about something, your readers will too. If the answer isn't available, let your readers know.

With the bulk of your research done, write a **chronological list**, a point form summary of every mention of the key info you've found, with your sources footnoted. This list will serve many purposes. It will point to quandaries such as conflicting details, and it'll give direction to your continuing research. Does the list bring to light significant gaps in time, which you'll have to account for?

The greatest value of the chronological list is in the way patterns and an overview of the subject pop out. It gives you perspective, injects order into all that material you've collected, and dispels feelings of chaos that have blocked many a writer from proceeding beyond this point. And there's yet more gold to be found in this exercise. The list will become an ongoing quick reference.

You may want to create several of these lists: one for the place, another for the era and events, and yet more for each of the key characters. Compare these chronologies against each other, looking for ways external forces impacted your protagonist's choices and fate—and vice versa.

A chronological list underscores the ebb and flow of your protagonist's activities, by gathering all the details in succinct form. For someone no longer living, this list may provide your only clues to personality, achievements, conflicts and disappointments. Does the reckoning of facts give you a better sense of how your protagonist faced adversity? Are there photos to give you more clues? Can you describe some aspects of his or her nature by what you see in photos? Things start to add up, for instance, when you come to realize that the woman you're writing about had ten children in just over a decade. If she looks haggard in that photo, you now know why.

If a lack of available material forces you to speculate, based upon scraps of evidence, acknowledge this with the use of cue words. "Reginald Pidcock appears to have had a kind nature, judging by his..." Be honest. It builds trust.

At this stage it can be helpful to tell some of the stories you've collected to a friend, as a way to gauge interest. Very few people want to hear every detail, so through storytelling you'll begin the process of honing.

With the chronological list in hand, write a bare bones **subject sketch** of about ten pages or less. Write it in chronological order, even though this may not be how you'll proceed when you write your manuscript. To keep things simple, use basic prose, with no attempts at scenes, narrative arc and other creative devices. You just want to get the story on paper in summary form.

For those who are writing for family, this sketch will be a treasure, especially if you opt to proceed no further. Some life writers may use this sketch as their first draft, dressing it up in their revisions with scenes, descriptive passages, narrative flow, photos and maps.

For those who have a more comprehensive project in mind, the value of the sketch is the way it kicks your writing brain into gear. Did writing this summary give you a sense of where the conflicts and problems were? For those writing about a specific topic or community history, maybe some key protagonists emerged? (Readers love to follow the lives of interesting people, even if you're writing a corporate or industrial history. Did this sketch show you where the highs and lows of a protagonist's life were, and how he responded to conflict? Did you find yourself wondering about issues you hadn't considered before?

The answers to these questions may take you back to your sources again, to delve into the heart of the matter. But, don't stop there. It's time to start writing—with your continued research as a sideline activity.

Pre-Writing Structure

Go back to those start up questions to see if you have answers now: who is your audience; what style and length of manuscript do you have in mind; what will the end product be? And here's a new question to ponder. Do you know what point of view you'll write from? As with all things related to writing, you'll have to experiment with this as you go. You may decide to adopt the standard third person form of the removed narrator. If you're writing memoir you may choose to write from the first person. (For more on point of view watch for blog posts on thescribes.ca site; and see the book *Voice & Vision, A Guide to Writing History and Other Serious Nonfiction* by Stephen J. Pyne.)

Some engaging life stories are being produced in "creative nonfiction," which borrows fiction devices. For a memoir, you could include dialogue, from your perspective. (See Lee Gutkind's book *Keep It Real* for some succinct insights into this emerging genre.)

Group the main subjects, written on "post it" notes, along the top, with the key scenes and events listed below. Each of these columns may later become your chapters. Keep moving the notes about until you have a narrative structure you can work with.

The important thing with fact-based writing is to make a pact with your readers to tell the truth. Read lots of contemporary nonfiction to see how writers create scenes, portray the troubles of your protagonists and use narrative arc to engage readers. "The reader expects a gripping tale," says Elizabeth Sims, "in every narrative she picks up, be it fact or fiction."

1862 DREAMS of a BETTER FUTURE & Adventure	ADVENTURES ON VANCOUVER ISLAND	The Comox VALLEY FARM SETTLEMENT	Comox VALLEY - Developing a frontier outpost	NEW 1985 DIRECTIONS A MOVE TO TERRY BRUSBY ALBERTA	DREAMS for the Future Lined UPON THE END Generation
IN ENGLISH LAD of good family - but not enough \$\$	The Cariboo Gold Rush	General experiences of settlers in Comox VALLEY	General experiences for settlers as farm community expands + carries over to poverty	CAREER SHIFT MOVES PHAY DEEPER INTO WILDERNESS- WIDENSHIPS FOR WIFE	PIDCOCK'S DREAMS for the Future as his life comes to a close
IMMIGRATION	IMPACT of INTENSE GOLD RUSH settle ment UPON FIRST NATIONS	IMMIGRANT'S IMPACT UPON ABORIGINAL PEOPLE	Degradation of Aboriginal community	DEEPENING NEGATIVE IMPACT of settlement on Aboriginal people + environment	Glimmers of the Road ahead f of BC + its people + 1860s/80s
Pidcock's goals are established in search of success \$\$\$	PIDCOCK FALLS IN LOVE WITH WILDERNESS	PIDCOCK- THE GAME HUNTER takes Aboriginal wife over 1865	THE PROVINCE of BC established joining a Confederation	PIDCOCK'S impact as a tool of the D.A. upon the Aboriginal people	Ending in how view? quote from the generations PIDCOCK moral to preserve the history?
SENSE of PLACE - it's a KEY CHARACTER	DREAMS LOVER + RESTURNS TO ORIGINAL GOALS- establishes first mill + sawmill 1874	PIDCOCK- THE BUSINESSMAN MARRIES A WOMAN of his own culture + class 1874	the wilderness becomes an adversary		
How Place changes Pidcock + his goals	THE RISE of a successful man - community leader	PIDCOCK OVER-EXTENDS his FINANCES + BUSINESS FAIL	MARRIAGE PROBLEMS + TRADITION PIDCOCK'S ability to persevere adversity		

Are you beginning to see an overarching “theme” for your book? If not, it will flesh out as you write the first draft. The sooner you know it, and can summarise the theme in one short sentence, the better your story focus and clarity will be. The theme, you see, dictates everything. It’ll tell you what to leave in and what to take out as you revise. It guides the flow of the narrative and its resolution.

There are writers who prefer to work without a plan. They just plunge in and let the story emerge organically. Others like a structure—**an outline**—to work from. An easy way to do this is with a “storyboard”. Use a bare piece of wall or a sheet of cardboard and write the titles of the overarching subjects on post it notes to run along a top row. Beneath each of these you’ll put smaller post its with a few key words to summarise scenes or subjects that align with these larger topics. The beauty of working with post its is that you can keep moving them around, adding more and taking some away—until you have a sense of how your narrative will unfold and what it will contain.

The next step, of course, is to write your first draft, which will be the subject of another paper to be placed on thescribes.ca website, along with blog postings. Until then, start writing. Plunge in at any place in the narrative where you feel most informed and enthused. You don’t have to start at the beginning. That can be fleshed out later. And bear in mind that this draft will not a well-crafted wonder. Not even the most experienced writer can achieve that.

“Later, we’ll edit,” wrote Marion Roach Smith in her excellent book *The Memoir Project*. “Later, we’ll throw around French phrases...and light cigars and feel terribly smug, but there’s no right word when there’s nothing on the page, and right now we need a vomit draft to muck around in.”

As Roach says it’s impossible to get your narrative down in perfect form the first time, so lock your inner critic in the desk drawer and let everything and anything flow in the first draft.

“The other method,” says Roach, “where you choose each word carefully as you go? It’s the death of writing.”



Close up of Air Mail 2, a lino block print by Richard Calver.

At every stage, from research to drafting, there will be highs and lows. Ultimately there will be enough stimulation and reward, along with the angst of moving into unknown territory, to produce huge rewards.