

Creating a Research Plan for Cluster Research

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Step #1- Organize your previous research into an annotated research log

Use an annotated research log to record data. Templates can be found at American Ancestors:

https://www.AmericanAncestors.org/uploadedfiles/content/education/online_classes/template%20annotated%20research%20log.xlsx

Step #2- Look for missing information and identify your goal

Once you have organized your previous research, you must then determine what information is lacking.

Define what you are looking for, such as:

- Birth date/place
 - Marriage date/place
 - Death date/place
 - Maiden name
 - Military service
 - Parent's names
 - Parent's place of birth
 - Immigration year
 - Naturalization status
 - Sibling's names
 - Children's names
- Next, determine what individuals or families intrigue you the most? Remember- it is best to tackle one line at a time.
 - Create a list of questions or objectives to research. Include these objectives on your research log, even before you begin your research.

Step #3- Who's your ancestor's F.A.N club?

- Who are the other **family** members? This includes family members with the same surname, but consider others:

Maiden name of spouse

In-laws

Cousins (1st and others)

Grandparents

Great-Grandparents

Step-Parents/Siblings

- Who are your ancestor's **associates**? This includes their friends, political affiliates, coworkers, classmates, and religious community, but also consider associated places:

Common place of birth

Similar death details

- Who are your ancestor's **neighbors**? This includes their household neighbors, but also consider:

Surrounding cemetery plots or stones

Pew assignments



Step #4- List records that will aid in your research

List records that will aid in your research:

- Census (Federal and State)
- Vital Records (Birth, Marriage, Death)
- Church Records
- Land Records (Federal, State, County)
- Court Records (Probate, Civil, Criminal)
- Newspapers (obits, wedding notices)
- Naturalization records or Passenger Lists
- City Directories

A helpful chart for identifying these records can be found at American Ancestors:

<https://www.AmericanAncestors.org/education/learning-resources/read/getting-started>

Find resources in repositories and online:

- Check both the online and physical holdings
- Contact historical societies, lineage societies, local libraries, genealogical societies, colleges and university archives, federal and state archives, town halls, etc. A great resource for manuscript collections can be found at ArchiveGrid: <https://beta.worldcat.org/archivegrid/>

Map out your plan of action: Use an Annotated Research Log to keep an organized list of the resources that you checked or the resources that you plan to check:

https://www.AmericanAncestors.org/uploadedfiles/content/education/online_classes/template%20annotated%20research%20log.xlsx

Step #5- Locate the resources

Educate yourself:

- Digitized Books:
 - <https://www.hathitrust.org/>
 - <https://books.google.com/>
 - <https://archive.org/index.php>
 - <https://openlibrary.org/>
 - <https://books.familysearch.org>
 - <http://library.si.edu/digital-library>
- Guide books:
 - Michael Leclerc, ed., *Genealogist's Handbook for New England Research*, 5th ed. (Boston: NEHGS, 2012)
 - *Red Book: American State, County, and Town Sources*, 3rd ed. (Ancestry Publishing, 2004)
 - *The Source: A Guidebook to American Genealogy*, 3rd ed. (Ancestry Publishing, 2006)
 - *New York Family History Research Guide and Gazetteer*, 1st ed. (NYG&B, 2015)
- Portable Genealogists
 - [Immigration to the U.S.](#)
 - [U.S. Naturalization](#)
 - [NY State Census](#)
 - [MA State Census](#)
 - [Using the Federal Census: 1790-1840](#)
 - [Using the Federal Census: 1850-1940](#)
 - [Organizing your Research](#)
 - [Problem Solving in Irish Research](#)
 - [17th Century New England Research](#)
 - [Using DNA in Genealogy](#)
 - [African American Resources](#)
 - [Applying to Lineage Societies](#)

- [Building a Genealogical Sketch](#)
- [Genealogical Numbering](#)
- [Editorial Stylesheet](#)
- [Reference Notes](#)
- [Indexing](#)
- Subject Guides: <http://www.AmericanAncestors.org/Education/Learning-Resources/Read>
- Family Search Wiki: https://www.familysearch.org/wiki/en/Main_Page
- NEHGS webinars
 - Upcoming: <http://www.AmericanAncestors.org/Education/Online-Classes/>
 - Archived: <http://www.AmericanAncestors.org/Education/Learning-Resources/Watch>

Step #6- Research

Perform the research as defined in your plan. Remember, the research plan is fluid, not absolute.

- Return to your original research plan to locate any holes or missed opportunities
- Be patient and open to alternative record groups and/or people of interest. For example, you may find more Family, Associates, and/or Neighbors of your ancestor (known as the FAN) once you start the research process:

Most Commonly Used Records

Censuses:

- **United States**- 1790, 1800, 1810, 1820, 1830, 1840, 1850, 1860, 1870, 1880, 1900, 1910, 1920, 1930, and 1940 (1890 U.S. Federal Census missing due to fire)
 - www.Ancestry.com
 - www.FamilySearch.org
 - www.AmericanAncestors.org
- **Canada**- 1825, 1831, 1842, 1851, 1861, 1871, 1881, 1891, 1901, 1906, 1911, 1916, and 1921
 - www.Ancestry.com
 - www.FamilySearch.org
 - NEHGS microfilm
- **UK**- 1841, 1851, 1861, 1871, 1881, 1891, 1901, 1911
 - www.Ancestry.com
 - www.FamilySearch.org
- **Scotland**- 1841, 1851, 1861, 1871, 1881, 1891, 1901, 1911
 - www.scotlandsppeople.gov.uk
- **Ireland**- 1901 and 1911
 - <http://www.census.nationalarchives.ie/>

Vital Records:

Modern vital records are often kept on the local level (either state, county, or town) while older records may have been moved to an archives, library, or local historical society. The location, availability, and accessibility of vital records vary from state to state.

- To locate available vital records in New England, consult [Genealogist's Handbook for New England Research, 5th ed.](#) (NEHGS, 2012).

- For vital records outside of New England, refer to *Red Book: American State, County, and Town Sources*, 3rd ed. (Ancestry Publishing, 2004) or *The Source: A Guidebook to American Genealogy*, 3rd ed. (Ancestry Publishing, 2006)

Bible Records:

- ArchiveGrid: <https://beta.worldcat.org/archivegrid/>
- www.AmericanAncestors.org
- http://services.dar.org/Public/DAR_Research/search/?Tab_ID=12

Cemetery Records:

In addition to transcribed cemetery records that may be found in local libraries or as manuscripts in a local historical society or genealogical society (such as NEHGS), you may find an online database. These are the most popular (some larger cemeteries have their own databases):

- www.findagrave.com
- www.billiongraves.com
- www.namesinstone.com
- www.interment.net

Church Records:

Once you identify your ancestor's religion, search in church records for their baptism, marriage, confirmation, or burial. Dismissals and Membership may also be included in the records of the church.

- Church archives
 - www.congregationallibrary.org (Congregational Church)
 - www.gcah.org (Methodist Church Archives)
 - <http://www.bostoncatholic.org/Offices-And-Services/Office-Detail.aspx?id=12294&pid=1484> (Catholic Church- Boston) <https://catholicrecords.americanancestors.org/>
- NEHGS library: <http://library.nehgs.org/>
- www.AmericanAncestors.org
- www.FamilySearch.org

Finding Aids (Examples):

Anderson, Robert Charles, *The Great Migration Begins: Immigrants to New England, 1620-1633* (3 vols., Boston: NEHGS, 1995-available as a searchable database); *The Great Migration: Immigrants to New England 1634-1635* (7 vols. to date; Boston, NEHGS, 1999-2011-available as a searchable database); *The Great Migration Directory* (Boston: NEHGS, 2015). These volumes include sketches of all known immigrants to New England from 1620-1640. Anderson not only utilizes the scholarship of the last hundred years, but also looks again at original records to provide a fresh, detailed, documented and insightful look at the Great Migration figures and their families.

Hollick, Martin E., *New Englanders in the 1600s: A Guide to Genealogical Research Published Between 1980 and 2010* (expanded edition; Boston: NEHGS, 2012) An extension of the work done by Clarence Almon Torrey that covers the most recent scholarship published from 1980 to 2010.

Torrey, Clarence Almon, *New England Marriages Prior to 1700* (12 vol. manuscript; 1962) Torrey spent years combing the NEHGS library's book and manuscript collection, to compile this annotated list of approximately 38,000 marriages of New Englanders that occurred prior to 1700.

Colket, Meredith B., [*Founders of Early American Families: Emigrants from Europe, 1607-1657*](#) (revised edition; Cleveland, Ohio: General Court of the Order of Founders and Patriots, 1985) - This book is an alphabetical, annotated list of all known immigrants to what is now the east coast of the United States within the first fifty years of English settlement, beginning with the establishment of Jamestown in 1607.

Land Records:

Maintained on the local level (county or town), these records can be found through searches using online databases, microfilm, transcription form, or the record may still be on local level.

- **Grantor**- Individual(s) selling property
- **Grantee**- Individual(s) buying property

Some land record websites and repositories:

- www.FamilySearch.org
- Family History Library
- NEHGS Library: <http://library.nehgs.org/>
- <https://www.glorerecords.blm.gov/default.aspx> (Federal land)

Probate Records:

Maintained on the local level (county or town), these records can be found through searches using online databases, microfilm, transcription form, or the record may still be on local level.

- **Wills and Testaments**- testator distributes his or her personal/real estate
- **Inventories**- verified, itemized list of property
- **Administrations**
- **Decrees**
- **Distributions**
- **Guardianships** -Appointed by the court to oversee the affairs of a minor or a business of a person deemed incapable
- **Divorce**
- **Adoption**
- **Orders**

Some probate websites and repositories:

- www.familysearch.org
- Family History Library
- NEHGS Library: <http://library.nehgs.org/>
- www.AmericanAncestors.org
- www.Ancestry.com

Military Records:

Which war? (<http://48e3l649yici2j96jp36bhdw.wpengine.netdna-cdn.com/ancestry/files/2014/11/info-graphic-war-births2.jpg>)

- www.fold3.com
- <http://www.nationalarchives.gov.uk/>
- www.AmericanAncestors.org

Newspaper Databases:

- **GenealogyBank.com**- \$\$ U.S. historic newspaper archives from 1690-2017, over 2 billion old newspapers- <http://www.genealogybank.com/>
- **Newspapers.com**- \$\$ Millions of U.S. and British Isles newspaper archives from 1700's-2000's – <https://www.newspapers.com/>
- **Newspaper Archive**- \$\$ U.S. historic newspaper archives from 1736-2017 in 2.21 billion old newspaper at <https://newspaperarchive.com/us/>
- **19th Century Newspapers-NEHGS subscription (available off-site with NEHGS membership)**
The [19th Century U.S. Newspapers](#) database provides access to approximately 1.7 million pages of primary-source newspaper content from throughout the 1800s. It features full text and images from hundreds of papers from every region in the U.S., and it contains a wealth of genealogical content, including birth, death, and marriage notices.
- **Irish Newspaper Archive- NEHGS subscription (available off-site with NEHGS membership)**
Large collection of [Irish newspapers from 1738 to current day](#). The archive consists of over 6 million images of pages of newspaper content from titles North and South of the Irish border, and includes newspaper obituaries, and birth, death and marriage notices.
- **Early American Newspapers, Series I, 1690–1876-NEHGS subscription (on-site only)** Over one million pages of fully-searchable early newspapers, such as the Boston Gazette, New-York Evening Post, and many more. Includes marriage, death, and court records.
- **Chronicling America (Library of Congress)**- FREE 11.9 million pages from coast to coast, a [Library of Congress](#) project that digitizes US newspapers from 1789 to 1924, as well as information to find unavailable digitized newspapers in libraries.

Step #7- Analyze and Draw your Conclusions

Write it down! Here are some helpful resources for writing/recording your family history research:

NEHGS Resources

Writing and Publishing Guide, <https://www.americanancestors.org/education/learning-resources/read/writing-publishing>

Portable Genealogist Compilation: Writing. This easy-to-use compilation includes seven guides to help with your genealogical writing: *Building a Genealogical Sketch*, *Genealogical Numbering*, *Editorial Stylesheet*, *Reference Notes*, *Indexing*, and *Compiling a Bibliography*, plus *Applying to Lineage Societies*.

Robert Charles Anderson, *Elements of Genealogical Analysis: How to maximize Your Research Using the Great Migration Study Project Method*, (Boston, Massachusetts: New England Historic Genealogical Society, 2014)

Penelope L. Stratton and Henry B. Hoff, *NEHGS Guide to Genealogical Writing* (Boston: NEHGS, 2014)

Other Writing Resources

The Chicago Manual of Style, 16th ed. (Available in print or online at www.chicagomanualofstyle.org/).

The bible of the book-publishing industry, “CMS” will help you with everything from capitalization to punctuation to reference style to guidelines for book production.

Elizabeth Shown Mills, *Evidence! Citation and Analysis for the Family Historian* (Baltimore: Genealogical Pub. Co., 1997) and *Evidence Explained: Citing History Sources from Artifacts to Cyberspace* (Baltimore: Genealogical Pub. Co., 2007). Comprehensive guides to citing genealogical works.

Cyndi’s List, “Writing Your Family’s History,” www.CyndisList.com/writing. The ever-helpful Cyndi’s List provides a number of links in such categories as Publishers, Publishing Online, Books, Diaries & Letters, Oral History & Interviews, Photographs & Memories.

Stories to Tell, <http://www.storiestotellbooks.com/blog>. This blog provides all kinds of tips on including narrative into your genealogy.