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## Session Roadmap

Planning Your Research

Research Questions  
Understanding time and place  
Mapping the strategy

Tracking

The Basics  
Custom Refinements

Recording

Key tools  
Abstracting forms

Voice of  
Ann G. Lawthers  
Genealogist

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## Make a Plan

Step 1

• What do you want to learn? (Goal)

Step 2

• What do you already know?

Step 3

• Do your background homework

Step 4

• Create your plan

Step 5

• Execute and fine tune your plan

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## Research Plan Template

- Research subject
- Research question
- What is known about the question (and how it is known)
- Record dates – for reference
- Working hypotheses
- Which records will I need
- Search strategy

**Research Plan Template**

Research Subject	Birth and place	Marriage and place	Death and place
Name			
Sexes and birthplaces of children	Name of spouse		
Additional Information			
Research Question			
What is Known About the Question?			
How	Where and when		
Research Goal			
Place	Format	Storage	Search
Cost	Level	Priority	Time
What is the Working Hypothesis?			
Which Records Will I Need?			
Name	Category	Search/Depository	
Search Strategy:			

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### Step 1: Creating Good Research Questions

- Choose a person!
- Make the question specific, answerable, realistic, timely
- Spend some time thinking about your question before plunging in



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### Choosing a Focus Person

- Anchors your research to a time and place
- May naturally expand to other individuals, but provides initial structure for your inquiry
- Example:
  - Elizabeth Harris, wife of Martin Powell

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### Research Plan Template

The image shows a screenshot of a 'Research Plan Template' form. The form has several sections: 'Research Subject', 'Birth and place', 'Marriage and place', and 'Death and place'. The 'Research Subject' section contains the text 'Elizabeth Harris', which is circled in red. Below this, there are fields for 'Name', 'Birth and place', 'Marriage and place', and 'Death and place'. The 'Name' field contains 'Elizabeth Harris'. There are also fields for 'Name of spouse' and 'Search Strategy'.

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### Creating a Good Questions

- Includes a name, place and date
- Question about:
  - Identity – what makes a person unique, e.g. name, age, occupation, maiden name
  - Events – usually birth, marriage, death, could be date of arrival into country, or military service
  - Relationships – parents, children, wife

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### Question of Kinship

- William George Riley Hampton – Question of Kinship
  - *OK*: Who are the ancestors of William George Riley (WGR) Hampton of Arkansas (b. ca 1855)?
    - Requires multiple iterations
  - *Better*: Who are the parents of William George Riley (WGR) Hampton of Arkansas County, Arkansas (b. ca 1855)?
    - Better initial specificity

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### Question of Identity

- Anna Deady Hance - Question of Identity
  - *Fair*: Which Thomas Deady of Chicago was the father of Anna Deady Hance?
    - What time period?
  - *Better*: Which Thomas Deady of Chicago was the father of Anna Deady Hance, who was born 1876?
    - Better specificity

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### Step 2: What Do You Already Know?

- About Subject
  - Identify the *Where* and the *When* for your subject
    - Helpful to list vital events – with *place*
    - Name of spouse(s)
    - Names and dob(s) for children
- About the Question
  - Not just what you know, but HOW you know it
  - Focus on what is relevant to the Research Question



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### What is Known About Subject?

Name:	Birth and place:	Marriage and place: Name of spouse:	Death and place:
Elizabeth Harris	Ca 1738, place unknown	1 Mar 1778, Manchester, Vermont Martin Powell	Unknown

Names and birthdates of children:  
 Silas b. ca 1779 – Manchester, VT  
 Electa b. ca 1781 – Manchester, VT  
 Sarah b. ca 1782 – Manchester, VT

Additional Information

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### What is Known About the Question?

**Research Question:**  
 Who are the parents of Elizabeth Harris who married Martin Powell in Manchester Vermont in 1778?

Fact	Source of Fact:
Her husband, Martin Powell was born in Amenia, NY	Find a Grave
Martin's first wife was Rhoda Thompson who died in 1777 in Manchester, VT	Vermont Vital Records
Rhoda may have married Martin in Amenia, NY	Ancestry tree

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### Research Plan Template

Research Subject			
Name	Birth and place	Marriage and place	Death and place
Elizabeth Harris	Ca. 1738, place unknown	1 Mar. 1778, Manchester, Vermont	Unknown
Names and birthdates of children			
Silas b. ca. 1779			
Electa b. ca. 1781			
Sarah b. ca. 1782			
Additional information			
<b>Research Question:</b> Who are the parents of Elizabeth Harris who married Martin Powell in Manchester, Vermont in 1778?			
<b>What is Known About the Question?</b>			
Fact	Source of Fact		
Her husband, Martin Powell was born in Amenia, NY	Find-a-Grave		
Martin's first wife was Rhoda Thompson who died in 1777. She had nine children with Martin	Vermont Vital Records		
Rhoda may have been born in Bellingham, MA	Massachusetts Vital Records		
Rhoda may have married Martin in Amenia, NY	Ancestry tree		

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### Step 3: Background Homework



- Learn about the place and time
- Learn about the geography (get a map)
- What do we think happened? (Hypothesis)
- Which records are most likely to have the answer?
- Where are those records? Which repositories?



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### Learning About a Place

- Essentials
  - Date community was founded
  - Dates of earliest records
  - Any record loss issues
- Additional recommended learning
  - History
  - Migration
  - Geography

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## Harris Question - History, Migration, and Geography

- NH land grants began in 1749 and continued until the outbreak of the Seven Years War
- At the end of the War Vermont came under NY jurisdiction until 1777 when it became a Republic
- Manchester was granted by NH in 1761 to settlers from Amenia, New York.
- Green Mountains were a barrier to migration

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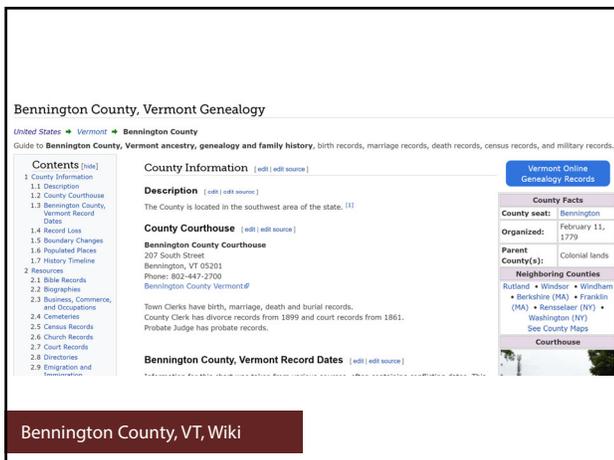
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Record Dates										
Place	Formed	Birth	Marriage	Death	Court	Land	Probate	Census	Record Loss	
Bennington, VT	1779	At town-creation	at town-creation	at town-creation	1861	1782	1778	1790	None	
Dutchess, NY	1663	1880	1908	1880	1730	1718	1752	1663	None	
Manchester, VT	1766 (org)								Unk	

Dates in template

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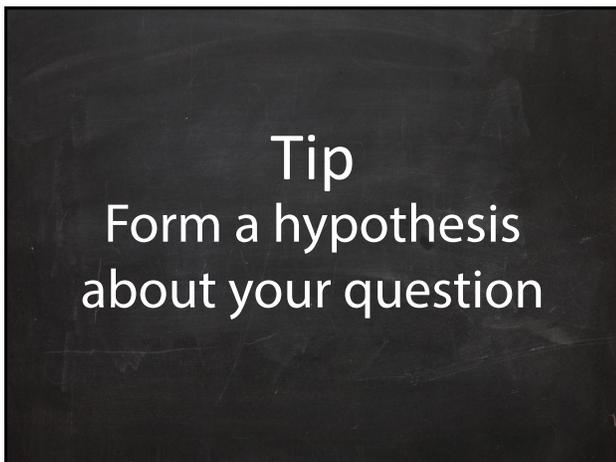
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**Creating a Hypothesis**

- Hypothesis = theory
  - About where you will find the records
  - What is going on in your situation
  - Possible answer to your questions
- Example
  - Looking for a death? Hypothesis is your ancestor died at the last town or county where they were known to have lived
  - Looking for a maiden name? Hypothesis is the children's records provide the answer

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## Hypothesis Example

What is the Working Hypothesis?

1. Elizabeth Harris was a widow in Manchester, Vermont, when she married Martin Powell in 1778
2. Elizabeth Harris was a spinster when she married Martin Powell

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## Another Hypothesis Example

- Question: Who are the parents of William George Riley Hampton, born about 1855 in Arkansas or South Carolina
- Known:
  - All censuses give Arkansas as place of birth
  - Married Martha Crockett 1873 in Arkansas
  - Lived most of life in Arkansas County, Arkansas

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## Is this Our WR? LaGrue, Arkansas County, Arkansas 1860?

Post Off	2	4	5	6	7
	W. H. Hagler	29 m			Merchant
	Caroline E.	28 f			Housewife
	Martha	26 f			Domestic
	Robert L.	17 m			Clerk in Store
	<u>Lucy Hampton</u>	<u>29 f</u>			<u>Domestic</u>
	William W.	6 m			
	Felix A.	4 m			
	Martha J.	4 f			

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## Template – Working Hypotheses

### What are the Working Hypotheses?

1. Lucy Hampton of 1860 census was Lucy Hagler before her marriage.
2. Lucy Hagler and ??? married about 1853 in Arkansas.
3. Although the Haglers, Martha, W.H. and Lucy, were from Tennessee, they lived in Arkansas by 1850.
4. William's siblings, Felix and Martha, have records that name the parents
5. There may be a published genealogy about the family
6. County histories may mention both families

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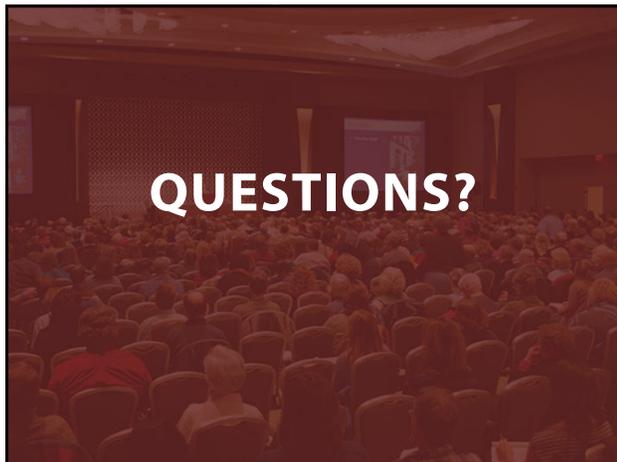
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## Tip

Make a list of needed records first, then match to availability for time and location

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### Hierarchy of Records for the Maiden Name

- Marriage record
  - License
  - Intentions
  - Banns
- Woman's death record (especially in the 20th century)
- Children's birth, marriage, and death records



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### Hierarchy for Parent's Names

- Birth and Death Records (ancestor and siblings)
- Census
- Probate
- Land
- Newspapers
- County histories

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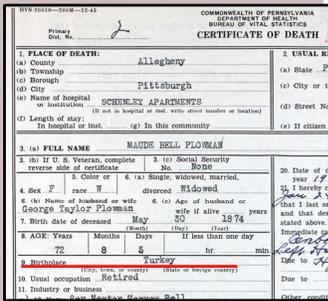
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### Birth Location

- Vital Records
- Census
- Migration Patterns
- FAN Club
- County Histories



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### Which Records Will I Need?

Information Needed	Search These Records First	Then Search These Records
Age	Census, Vital Records, Church Records, Cemeteries	Military Records, Taxation, Bible Records, Town Records, Emigration and Immigration
Birth date and place	Vital Records, Church Records, Census (for place), Town Records	Cemeteries, Bible Records, Newspapers
Marriage date and place	Vital Records, Church Records, Census, Newspapers, Bible Records	Military Records, Probate Records, Naturalization
Death date and place	Vital Records, Church Records, Cemeteries, Probate Records	Newspapers, Bible Records, Military Records, City Directories
Parents' names	Vital Records, Census, Probate Records, Newspapers, Published Genealogies, Local Histories	Emigration and Immigration, Bible Records
Maiden name	Vital Records, Church Records, Newspapers, Bible Records	Cemeteries, Military Records, Probate Records, Town Records

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### More Records

Information Needed	Search These Records First	Then Search These Records
Immigration date	Census (year only), Immigration, Naturalization	Newspapers, Biographies
Country of foreign birth	Naturalization Records, Census, Church Records, Vital Records, Emigration and Immigration	Cemeteries, Military Records, Newspapers, Local Histories
Foreign birth location	Vital Records, Emigration and Immigration, Census, Published Genealogies, Local Histories, Naturalization	Newspapers, Church Records, Military Records
Places family has lived	Census, Land, Local Histories, City Directories, Vital Records	Newspapers, Taxation, Military Records, Probate Records

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### Research Plan Template

**Research Plan Template**

**Which Records Will I Need?**

Record	Purpose	Source/Repository

**What is the starting date/endpoint?**

**What is the ending date/endpoint?**

**What is the search strategy?**

**Search Strategy:**

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## Which Records (Basic)

Which Records Will I Need?		
Record	Purpose	Source/Repository
Marriage records of Manchester Vermont	First marriage of Elizabeth Harris	FamilySearch.org, AmericanAncestors.org or Ancestry.com
Vital records of Amenia, NY	First marriage or any mention of Harris family	FamilySearch.org, AmericanAncestors.org or Ancestry.com
Town history of Manchester, VT	Any mention of the Harris family	HathiTrust.org or local historical society

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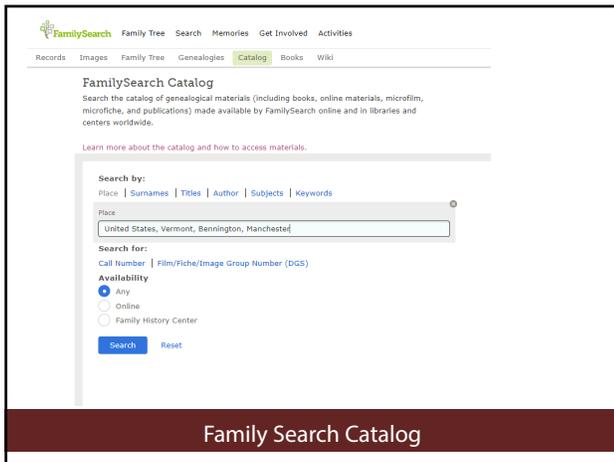
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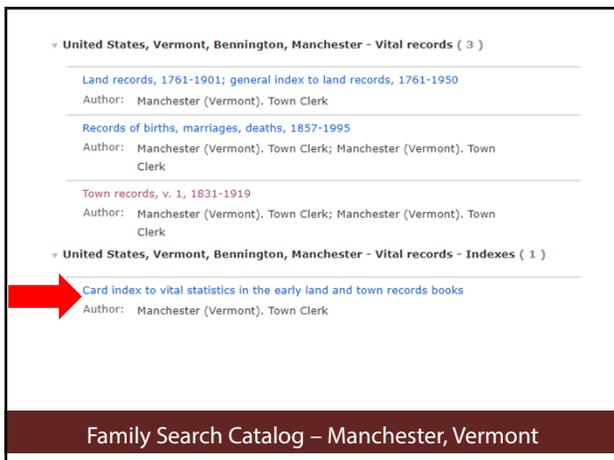
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### Which Records (Advanced)

Which Records Will I Need?		
Record	Purpose	Source/Repository
Card index to vital statistics in the early land and town records books, Manchester Vermont	First marriage of Elizabeth Harris	<a href="https://www.familysearch.org/search/catalog/664510?availability=Family%20History%20Library">https://www.familysearch.org/search/catalog/664510?availability=Family%20History%20Library</a>
Vital records, 1749-1786 of Amenia, NY	First marriage or any mention of Harris family	<a href="https://www.familysearch.org/search/catalog/380341?availability=Family%20History%20Library">https://www.familysearch.org/search/catalog/380341?availability=Family%20History%20Library</a>
John S. Pettibone, "Early History of Manchester," Proceedings of the Vermont Historical Society 1930 Vol 1 (4), page 158	Any mention of the Harris family	<a href="https://vermonthistory.org/journal/misc/EarlyHistoryOfManchester.pdf">https://vermonthistory.org/journal/misc/EarlyHistoryOfManchester.pdf</a>

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## Search Strategy

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### Order Your Search

- By repository
  - Online first
  - Brick and mortar second
- By likelihood of success
  - Marriage records before children's records when looking for a maiden name
  - Census before probate when looking for 19<sup>th</sup> century parent names
- By ease of searching
  - County histories and compiled genealogies first
  - Land records last

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### Online Repositories

- Americanancestors.org
- Ancestry.com
- Familysearch.org
- 19th Cent. US Newspapers (available through your NEHGS membership)
- Irish Newspaper Archive (available through your NEHGS membership)
- <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>

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### Brick and Mortar Repositories

- NEHGS – 99-101 Newbury Street
- Local County Clerks Offices
- Local Historical Societies
- Cemeteries
- Vital Records Offices
- NARA
- College or University Archives
- Lineage Societies
- Genealogical Societies
- Regional Museums

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### Put it Together

- ✓ Research subject
- ✓ Research question
- ✓ What is known about the question (and how it is known)
- ✓ Record dates – for reference
- ✓ Working hypotheses
- ✓ Which records will I need
- ✓ Search strategy

**Research-Plan-Template**

Subject #	Subject #	Management plan #	Death certificate #
1	2	3	4

Research-Plan-Template

1. U.S. State Archives and Records Administration, <https://www.archives.gov/research/>




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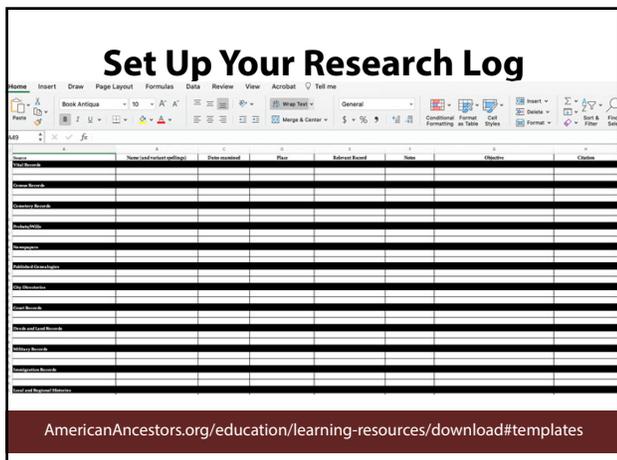
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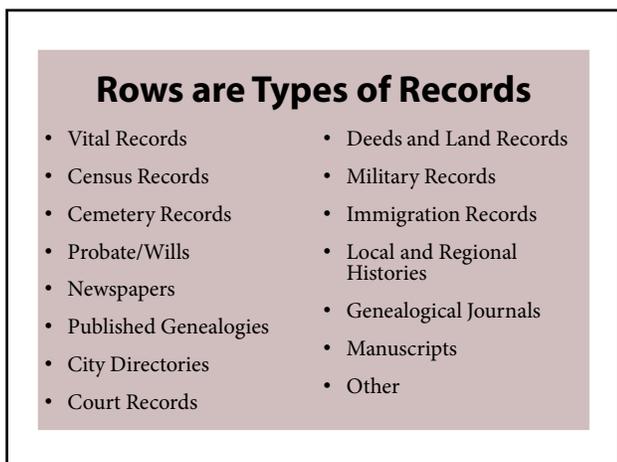
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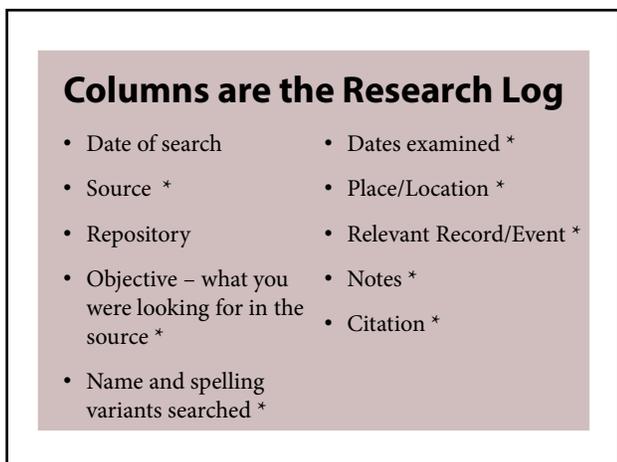
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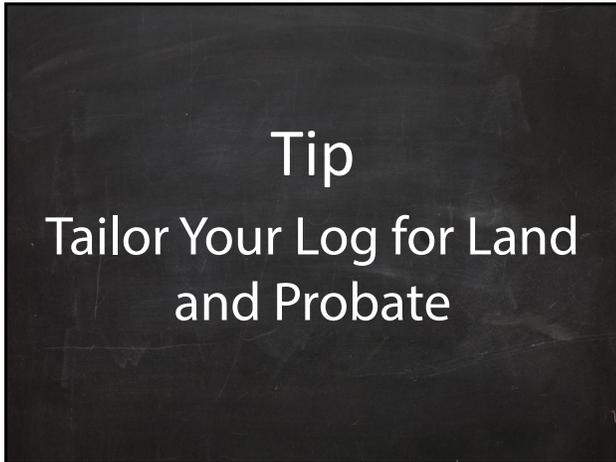
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Annotated Research Log								
Source	Repository	Objective	Time Period	Location	Type of Record	Filing	Notes	Citation
<b>Just Research</b>								
<b>Given Research</b>								
1840 U.S. Federal Census	FD	Croft's Family	1840	Eastchester			James, Elizabeth, Maryella, John, James, John, Thomas	1840 U.S. Federal Census, Eastchester, Westchester, New York, Population Schedule, ED 25, page 25, Family 233, household of James Croft; online image viewed at Ancestry (ancestry.com) viewed 4 Feb 2015; citing NARA microfilm M553, roll 1114.
1840 U.S. Federal Census	FD	James Croft	1840	New York			James, Ellen, Eliza	1840 U.S. Federal Census, New York CD and 175, New York, Population Schedule, Page 2146, household of James Croft; online image viewed at Ancestry (ancestry.com) viewed 4 Feb 2015; citing NARA microfilm M553, roll 1114.
1840 U.S. Federal Census	FD	James Croft	1840	Eastchester			James, Eliza, Ellen, John, James, Isaac, Mary, Eliza	1840 U.S. Federal Census, Eastchester, Westchester, New York, Population Schedule, Page 99, household of the Croft; online image viewed at Ancestry (ancestry.com) viewed 4 Feb 2015; citing NARA microfilm M553.
1840 U.S. Federal Census	FD	James Croft	1840	Eastchester			James, Eliza, Maryella, John, James, James, Thomas	1840 U.S. Federal Census, Eastchester, Westchester, New York, Population Schedule, Page 2748, household of James Croft; online image viewed at Ancestry (ancestry.com) viewed 4 Feb 2015; citing NARA microfilm M553, roll 1114.
<b>Research Results</b>								
<b>Substantive</b>								
<b>Newsprint</b>								
<b>Unfilled Census Lists</b>								
<b>City Directories</b>								

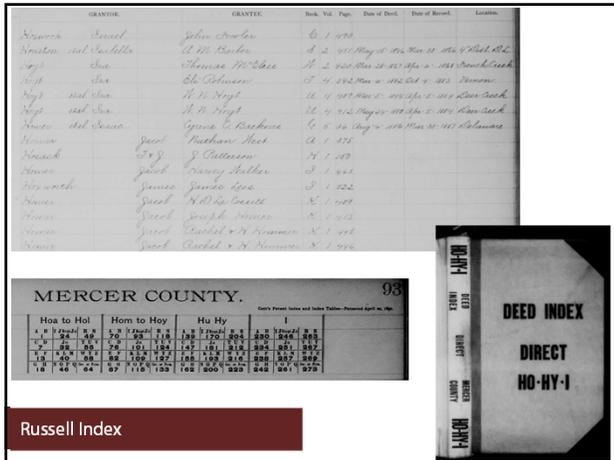
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Abstracted by:		Date:				
Names Researched:						
County:	State:	Repository:	Film #		Item #	
			Start image #			
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Notes about index arrangement:						
Grantor/Seller to Grantee/Buyer	Type of Instrument	Date of Filing	Date of Instrument	Book	Page	
		Location				
		Location				
		Location				
		Location				
		Location				
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		Location				
Deed Index Log						

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Russell Index

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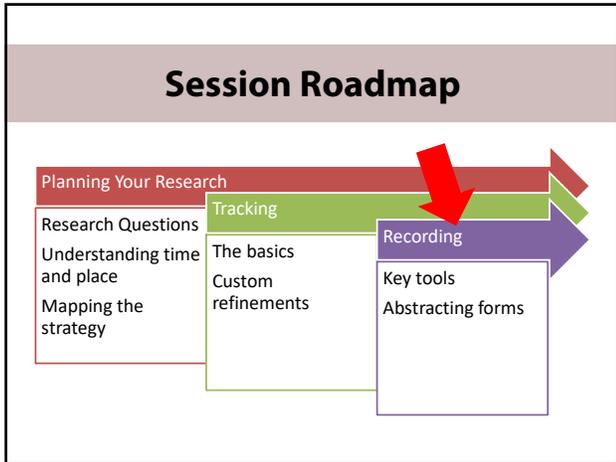
Deed Index Survey							
Abstracted by:	A Lawthers			Date:	8/24/2022		
Names Researched:	Homer						
County:	Mercer	State:	PA	Repository:	FHL	Film # Item #	78423323
						Start image #	247
Grantee/InDirect/Buyer Deed Index Book:	Go-Hy-J	Time Period Covered:	1803-1900				
Notes about index arrangement:							
Russell Index "J" starts page 93. Hom starts page 70							
Grantee/Seller to Grantee/Buyer	Type of Instrument	Date of Filing	Date of Instrument	Book	Page		
Homer, Isaac	Deed	9/25/1877	9/25/1877	Z3		108	
Burton, JE	Location		Coolspring				
Homer, Jacob	Deed			A1		81	
Homer, George	Location		not given				
Homer, J.A.		11/26/1883	8/13/1881	R4		204	
Homer, S. W.	Location		Delaware				
Homer, Jennie W.		3/13/1913		7/23/1913	V 3	362	
Stephenson, Mollie M.	Location		West Salem				
Homer, Jennie W.		V 1913		12/23/1913	V 3	152	
Arthurock, Amelda	Location		Greenville				

Homer Survey

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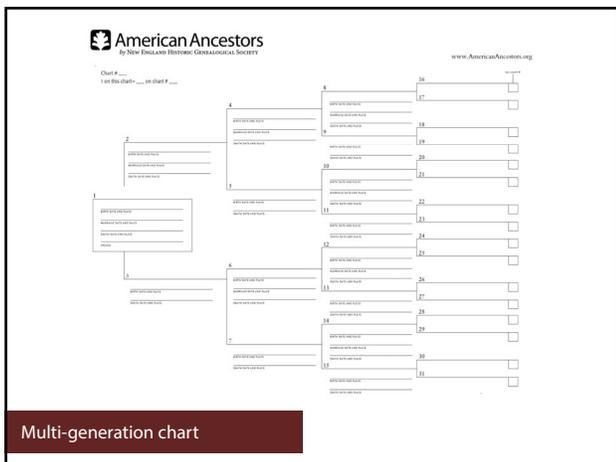
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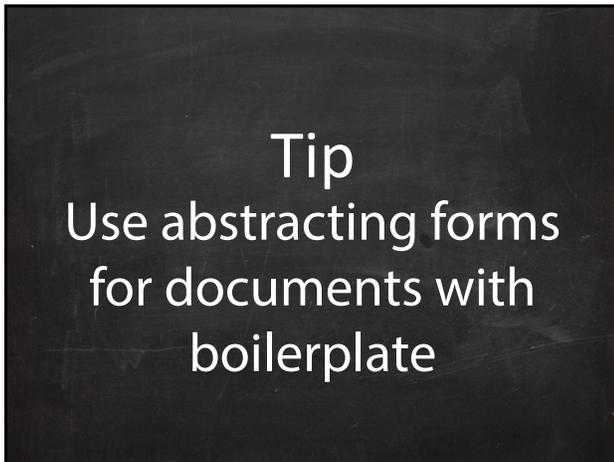
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Land Abstraction Form

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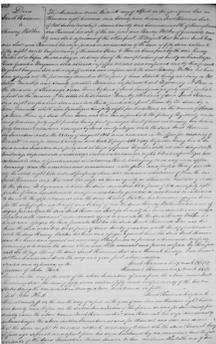
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This Indenture made the ninth day of April in the year of our Lord one thousand eight hundred and twenty nine between Jacob Hommer Senr of West Salem township Mercer County and Commonwealth of Pennsylvania and Hannah his wife of the one part and Harvey Walker of Greenville County and State aforesaid of the other part. Witnesseth that the said Jacob Hommer Senr and Hannah his wife for and in consideration of the sum of fifty seven dollars and fifty eight cents lawful money of the United States to them in hand paid by the said Harvey Walker at or before the ensembling or delivery here of the receipt whereof is hereby acknowledged. Have Granted Bargained s Sold aliened enfeoffed released and confirmed and by these presents Do grant bargain sell alien enfeoff release and confirm unto the said Harvey Walker his heirs and assigns all the following described lot or piece of land situate lying and being in West Salem township and County aforesaid Bounded as follows to wit Beginning at Stones in the middle of Shenango river thereby land of Jacob Loutzenhizer forty eight perches to a post in the middle of the little lake "so called" thence by other land of said Jacob Hommer by a right angled line seven and two third perches to a post thence by the same by a line . . .

Deed, Homer to Walker, 1829

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**Land-Abstract-Form**

FHL-Film# 7896733a		Image# 246a
County-and-State# Mercer, PAa		Book-and-Page-## 11,-463a
Grantor-(name,-residence)# Jacob-and-Hannah-Homer,-West-Salems		Grantee-(name,-residence)# Harvey-Walker,-Greenvillea
Date-of-Acknowledgment# 9-April-1829a	Date-recorded-# 9-April-1829a	Consideration-# \$57.58a
Acreage---2-acresa		
Pertinent-physical-features,-e.g.-water-courses# Starts-at-stones-in-middle-of-Shenango-River,-thence-by-land-of-Jacob-Loutzenhizer-to-post-in-middle-of-lake,-thence-by-Hommer-land-back-to-middle-of-Shenango-River.-#		
Neighbors# Jacob-Loutzenhizer,-Jacob-Hommers		
Dower-release# Yes,-by-Hannah	Homestead-releasea	Other-releasea
Other# Part-of-larger-tract-from-Jacob-Loutzenhizer-to-Jacob-Hommer,-28-August-1815,-recorded-book-D,-page-408-and-409.a		

Abstracted, Homer to Walker, 1829

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**Probate-Abstraction-Form**

FHL-Film#		Image-#a
County-and-State#		Book-and-Page-#a
Type-of-Documents-(will,-administration,-guardianship,-etc.)a		
Deceased-a	Executor-a	
Date-Made-a	Date-Proved-a	
Heirs# # # # #		
Witnesses		
Notes		

Probate Abstraction Form

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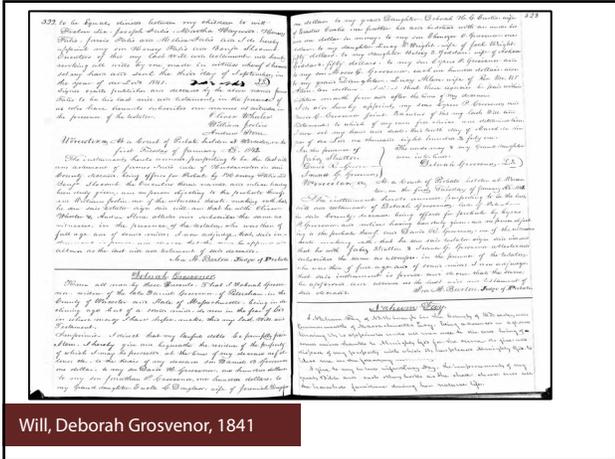
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Will, Deborah Grosvenor, 1841

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Probate-Abstraction Form	
Ancestry DB - Massachusetts, U.S., Wills and Probate Records, 1633-1991	
County and State Worcester, Massachusetts	
Type of Document (will, administration, guardianship, etc.) Will	
Deceased Deborah Grosvenor	Executor Cyrus P. Grosvenor and Moses G. Grosvenor, sons
Date Made 10 March 1841	Date Proved First Tuesday, January 1842
Heirs Cyrus P. Grosvenor (son) Moses G. Grosvenor (son) Daniel S. Grosvenor (son-deceased), his heirs David H. Grosvenor (son) Jonathan P. Grosvenor (son) Eli G. Douglas (grand-daughter) Deborah H. G. Curtis (grand-daughter) Ebenezer Grosvenor (son) Lucy Wright (daughter) Betsey Goddard (daughter) Lucy Allen (granddaughter)	
Witnesses Jabez Stratton David R. Grosvenor John G. Grosvenor	

Will Abstract Deborah Grosvenor

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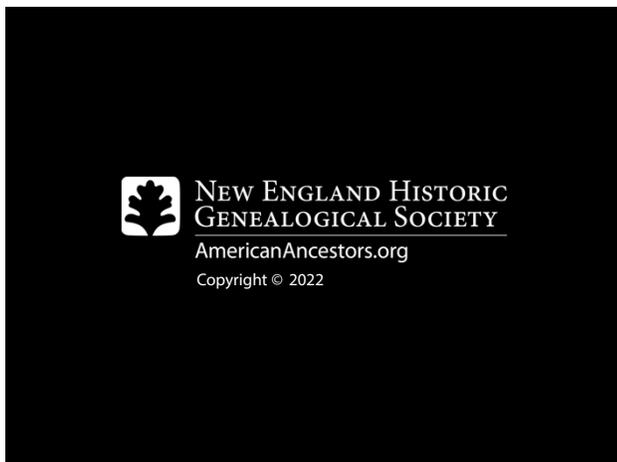
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