

# Building Your Genealogical Skills

*Basics 1: Principles of Genealogical Research*

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THE BRUE FAMILY LEARNING CENTER



American Ancestors®  
by NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY

# Course Overview

## Part 1 - Basics

B1: Principles of Genealogical Research

B2: Learning About Records

## Part 2 - Researching

R1: Planning for Research

R2: How to Research

R3: Organizing for Family Historians

## Part 3 - Analyzing

A1: Citations

A2: Critically evaluating your findings

# Module Roadmap

What is Genealogy?

A light green downward-pointing arrow indicating the flow from the first step to the second.

Genealogical Research  
Method

A light teal downward-pointing arrow indicating the flow from the second step to the third.

Tools and Techniques

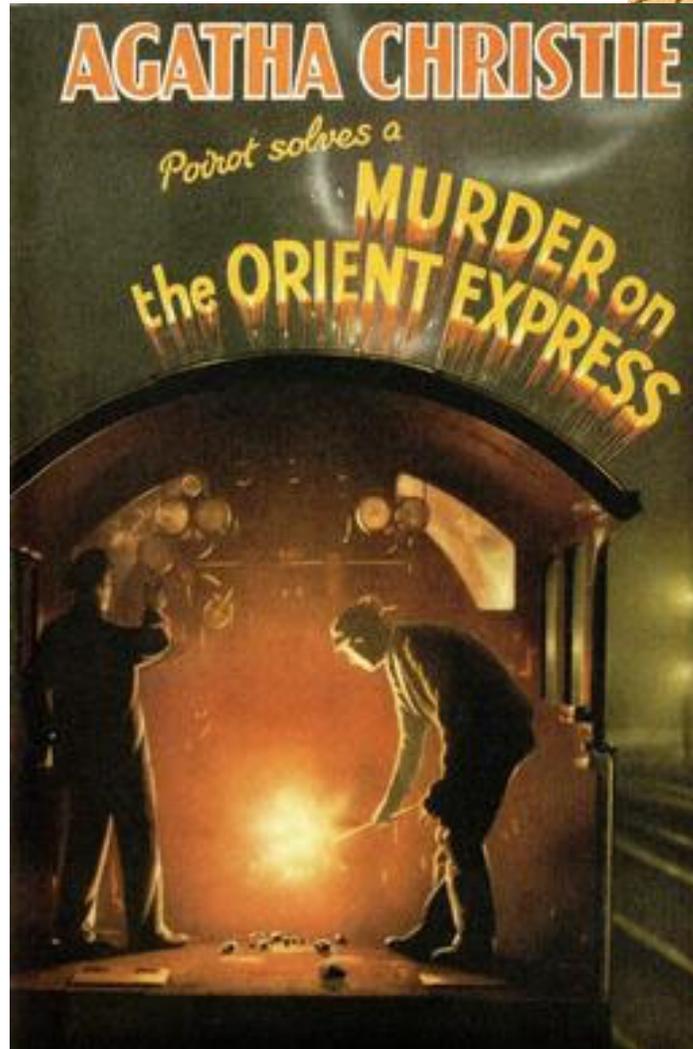
# What is Genealogy?

ge·ne·al·o·gy (jēnē'äləjē)

- Study of our ancestors - our parents, their parents, siblings and so on
- More than names and dates - stories and how our families fit into history
- Stems from ancient Greek
  - *Genea* meaning generation
  - *Logia* meaning telling or discourse or study of

Why should we study our  
Family history?

## Detective Work



OR



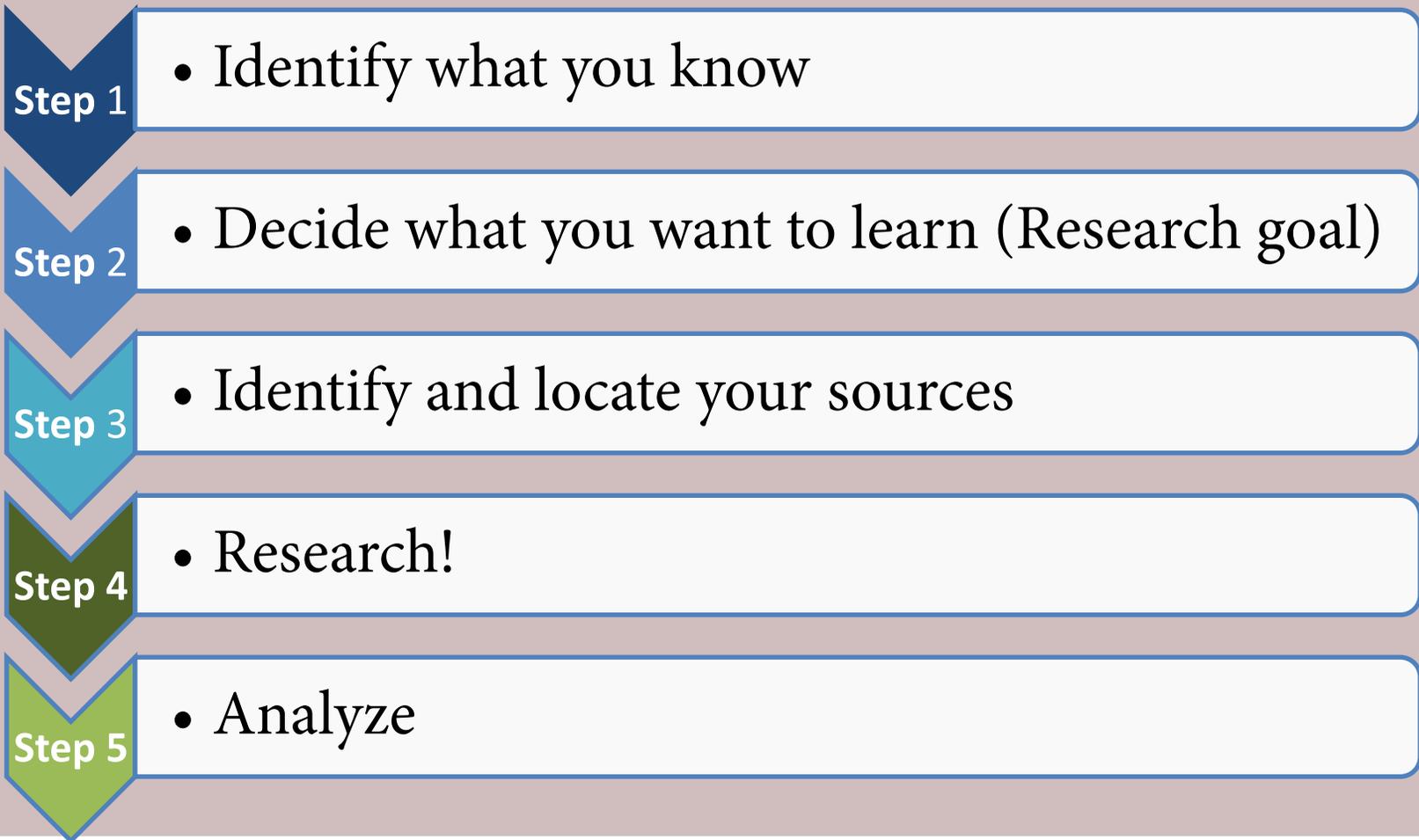
**Jigsaw Puzzle**

# Connect to History

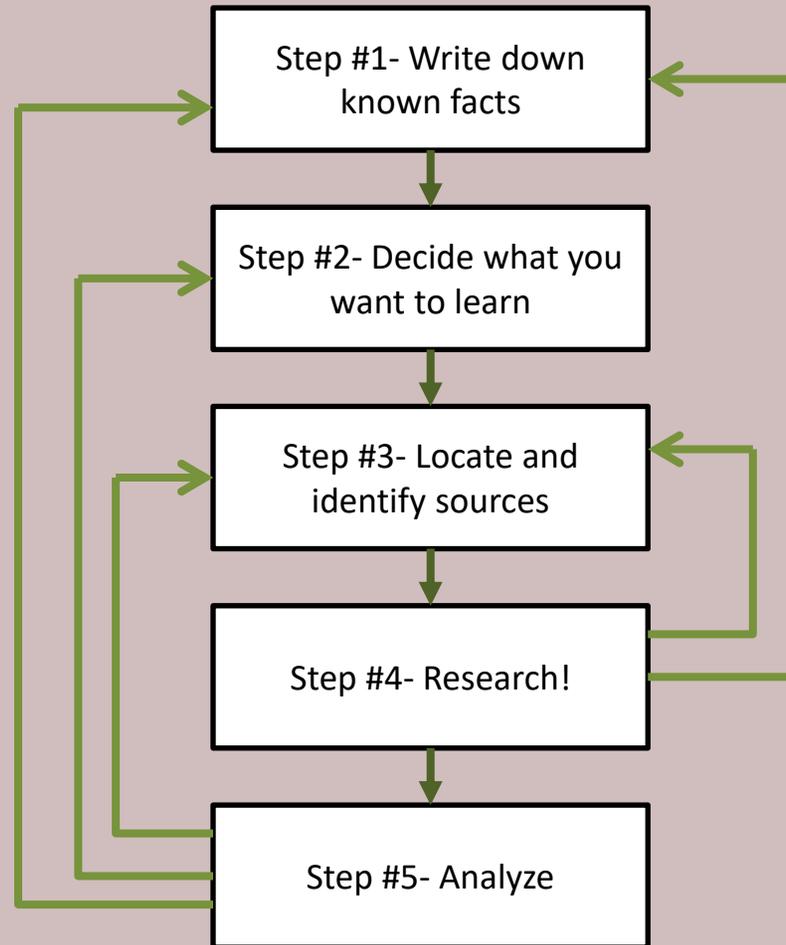
- Window into the past – learn about new people and new places
- Connect your family story to notable events in history



# Steps for Researching Your Family



# Rinse and Repeat



Rule # 1:

Work from the known  
to the unknown

# Step 1: Identify What You Know

- Interview yourself
- Talk to relatives—What do they know? What family stories were they told?
- Record data using a family group sheet, chart, or genealogical software

# Example: Family Interview Questions

- Where did you live when you were growing up?
- How did your family come to live there?
- Were there other family members in the area? What were their names?
- What was your family religion?
- What family stories have you heard about your parents? Your grandparents? More distant relatives?
- What stories have you heard about the European (or other) origins of your family members and their immigration to America?

Rule # 2:

Write It Down

# The Essential Toolkit

- Notebook – paper or Evernote or One Note
- Pedigree chart
- Family Group Sheet
- Research Plan
- Research Log
- Genealogical software program (optional)

Tip

Always Use Pencil!!

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## Download Templates and Charts

### Free Resources from NEHGS

#### Education

#### Learning Resources

Watch

Read

Download

#### Online Programs

#### Research Tours & Programs

#### Events and Programs

**Register for a FREE Guest account** to access forms, templates and other tools to help organize and present your family history research. [More about Guest benefits.](#)

**Already have an account? Log in** for access to more resources or [join](#) to enjoy full member benefits, including:

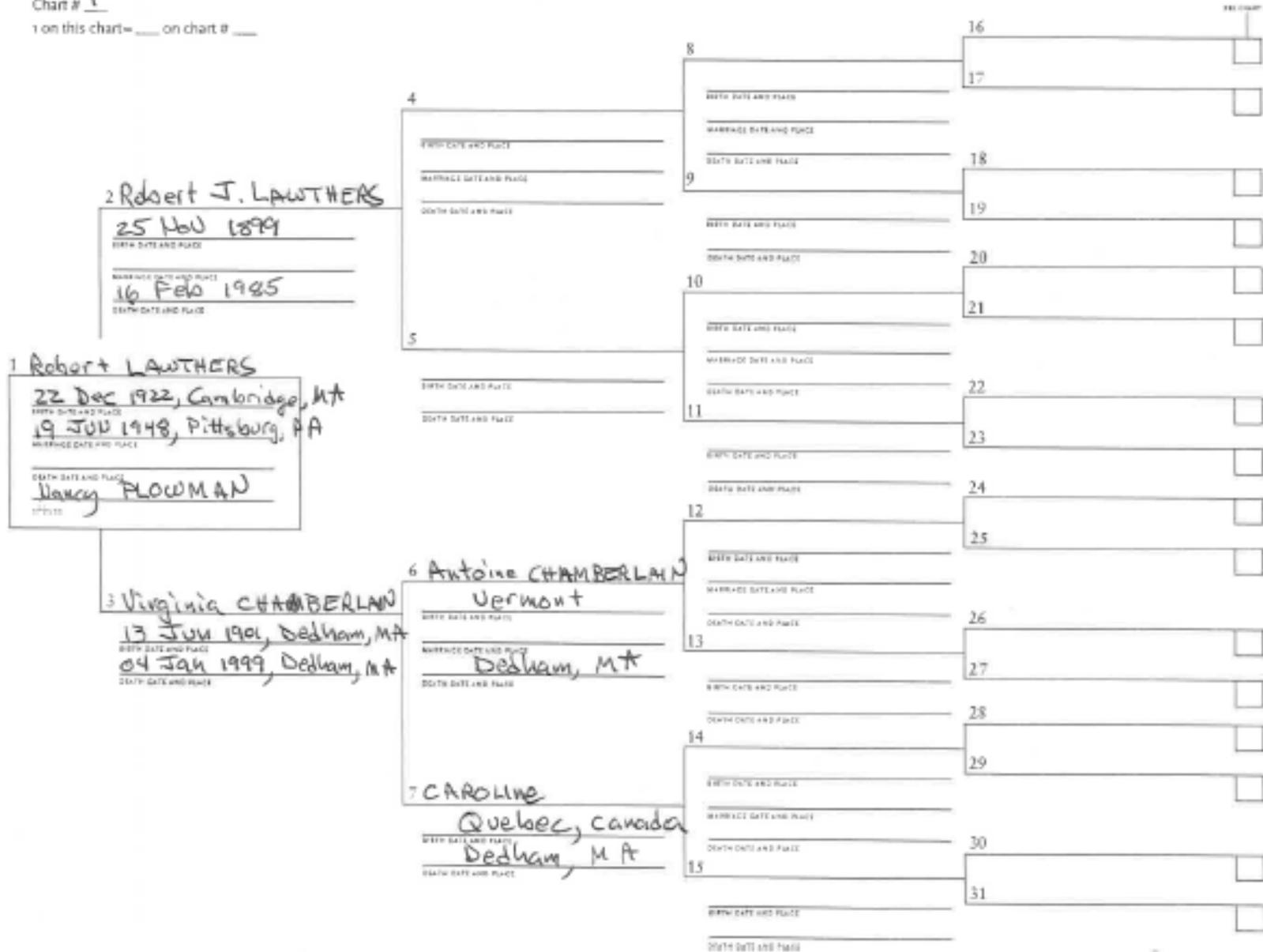
-  Access to all 1+ billion records on AmericanAncestors.org
-  Quarterly delivery of the member magazine, *American Ancestors*
-  Delivery of NEHGS's scholarly journal, *The Register*
-  Discounts on research-for-hire, consultations and publications
-  Free admission to NEHGS's library including special collections and manuscripts
-  Member-only online courses
-  NEHGS's weekly e-newsletter *The Weekly Genealogist*

<https://www.americanancestors.org>



Chart # 1

1 on this chart = \_\_\_\_ on chart # \_\_\_\_





## Family Group Sheet

Write dates as Day, Month, Year  
example: 1 Jan 1904

<b>Father</b>	Given Name(s)			Last Name	
	Born	Place			
	Died	Place			
	Married	Place			
	Father's Father <i>(first, middle, last)</i> Father's Mother <i>(first, middle, maiden)</i> Other Marriages <i>(first, middle, last)</i>				
<b>Mother</b>	Given Name(s)			Last Name	
	Born	Place			
	Died	Place			
	Mother's Father <i>(first, middle, last)</i> Mother's Mother <i>(first, middle, maiden)</i> Other Marriages <i>(first, middle, last)</i>				
	<b>Child #1</b>	Sex	Given Name(s)		
Born		Place			
Died		Place			
Spouse <i>(first, middle, last)</i>				Place	
Married		Place			
<b>Child #2</b>	Sex	Given Name(s)			Last Name
	Born	Place			
	Died	Place			
	Spouse <i>(first, middle, last)</i>			Place	
	Married	Place			
<b>Child #3</b>	Sex	Given Name(s)			Last Name
	Born	Place			
	Died	Place			
	Spouse <i>(first, middle, last)</i>			Place	
	Married	Place			



## Family Group Sheet

Write dates as Day, Month, Year  
example: 1 Jan 1904

Father <i>(first, middle, last)</i> Mother <i>(first, middle, maiden)</i>					
<b>Child #4</b>	Sex	Given Name(s)			Last Name
	Born	Place			
	Died	Place			
	Spouse <i>(first, middle, maiden)</i>			Place	
	Married	Place			
<b>Child #5</b>	Sex	Given Name(s)			Last Name
	Born	Place			
	Died	Place			
	Spouse <i>(first, middle, maiden)</i>			Place	
	Married	Place			
<b>Child #6</b>	Sex	Given Name(s)			Last Name
	Born	Place			
	Died	Place			
	Spouse <i>(first, middle, last)</i>			Place	
	Married	Place			
<b>Child #7</b>	Sex	Given Name(s)			Last Name
	Born	Place			
	Died	Place			
	Spouse <i>(first, middle, last)</i>			Place	
	Married	Place			
Sources of information					

# Toolkit Item #2: Family Group Sheet



## Family Group Sheet

Write dates as Day, Month, Year  
example: 1 Jan 1904

<b>Father</b>	Given Name(s)	Robert Joseph	Last Name	LAWTHERS
	Born	25 Nov 1899	Place	
	Died	16 Feb 1985	Place	
	Married		Place	
	Father's Father (first, middle, last)	?		
	Father's Mother (first, middle, maiden)	?		
Other Marriages (first, middle, last)				
<b>Mother</b>	Given Name(s)	Virginia	Last Name	CHAMBERLAIN
	Born	13 Jun 1901	Place	Dedham, Norfolk County, MA
	Died	04 Jan 1999	Place	" " " "
	Mother's Father (first, middle, last)	Antoine CHAMBERLAIN		
	Mother's Mother (first, middle, maiden)	Caroline ?		
	Other Marriages (first, middle, last)			
<b>Child #1</b>	Given Name(s)	Robert	Last Name	LAWTHERS
	Born	22 Dec 1922	Place	Cambridge, Middlesex County, MA
	Died		Place	
	Spouse (first, middle, last)	Nancy Carrington FLOWMAN		
	Married	19 Jan 1948	Place	Pittsburgh, PA
	Other Marriages (first, middle, last)			
<b>Child #2</b>	Given Name(s)	David	Last Name	LAWTHERS
	Born	28 Feb 1927	Place	Boston, Suffolk County, MA
	Died		Place	
	Spouse (first, middle, last)	Paula ?		
	Married		Place	
	Other Marriages (first, middle, last)			
<b>Child #3</b>	Given Name(s)	Michael	Last Name	LAWTHERS
	Born	20 Aug 1932	Place	Cambridge, Middlesex County, MA
	Died		Place	
	Spouse (first, middle, last)	Sarah Dorian		
	Married	31 Aug 1957	Place	Maine
	Other Marriages (first, middle, last)			



## Family Group Sheet

Write dates as Day, Month, Year  
example: 1 Jan 1904

<b>Father</b>	Given Name(s)		Last Name	
	Born		Place	
	Died		Place	
	Married		Place	
	Father's Father (first, middle, last)			
	Father's Mother (first, middle, maiden)			
Other Marriages (first, middle, last)				
<b>Mother</b>	Given Name(s)		Last Name	
	Born		Place	
	Died		Place	
	Married		Place	
	Mother's Father (first, middle, last)			
	Mother's Mother (first, middle, maiden)			
Other Marriages (first, middle, last)				
<b>Child #4</b>	Given Name(s)		Last Name	
	Born		Place	
	Died		Place	
	Spouse (first, middle, maiden)			
	Married		Place	
	Other Marriages (first, middle, last)			
<b>Child #5</b>	Given Name(s)		Last Name	
	Born		Place	
	Died		Place	
	Spouse (first, middle, maiden)			
	Married		Place	
	Other Marriages (first, middle, last)			
<b>Child #6</b>	Given Name(s)		Last Name	
	Born		Place	
	Died		Place	
	Spouse (first, middle, last)			
	Married		Place	
	Other Marriages (first, middle, last)			
<b>Child #7</b>	Given Name(s)		Last Name	
	Born		Place	
	Died		Place	
	Spouse (first, middle, last)			
	Married		Place	
	Other Marriages (first, middle, last)			
<b>Sources of Information</b>				
1) Interview, Robert Lawthers 2) "Maine Marriages" - Ancestry (www.ancestry.com); record for Michael Lawthers 3) Social Security Death Index				

# Record the Information As You Go

- Keep a “working draft”
- Use the forms
  - Tree/pedigree chart
    - Pen/paper
    - Online (AncesTREES, Ancestry.com, FamilySearch.org)
    - Software (FamilyTreeMaker, RootsMagic, Legacy Family Tree)
  - Family group sheet
  - Interview form/family questionnaire
  - Save original images/Documents



# Genealogical Recording Conventions: Names

- Write surnames in all CAPITAL LETTERS
- Record a woman with her maiden name
- When the maiden name is unknown use:
  - [--?--] can be used
  - MNU
  - Just the given name

# Genealogical Recording Conventions: Dates

- Records dates as DD-MMM-YYYY  
(e.g. 23 MAR 1823)
- DON'T:
  - Use slash marks: 3/12/1823
  - Use a two-digit year: 3/12/23

# Genealogical Recording Conventions: Places

- Note smallest to largest geographic division (e.g. Orleans, Orange County, Indiana)
- For outside the U.S.:  
townland/parish, county, country
- Be sure to identify counties
- Use a consistent style

## Step 2: Decide What You Want to Learn

- Examine the information you have
- What is missing?
- What individuals or families intrigue you the most?
- Create a list of questions or objectives to research



# Typical Genealogical Questions

- Genealogical Data
  - Identity
  - Events
  - Relationships
- For example:
  - Who are the parents?
  - What is the date or place of birth, marriage or death?
  - What is the spouse's name, or maiden name?
  - Who are the siblings?
  - Where did the family come from

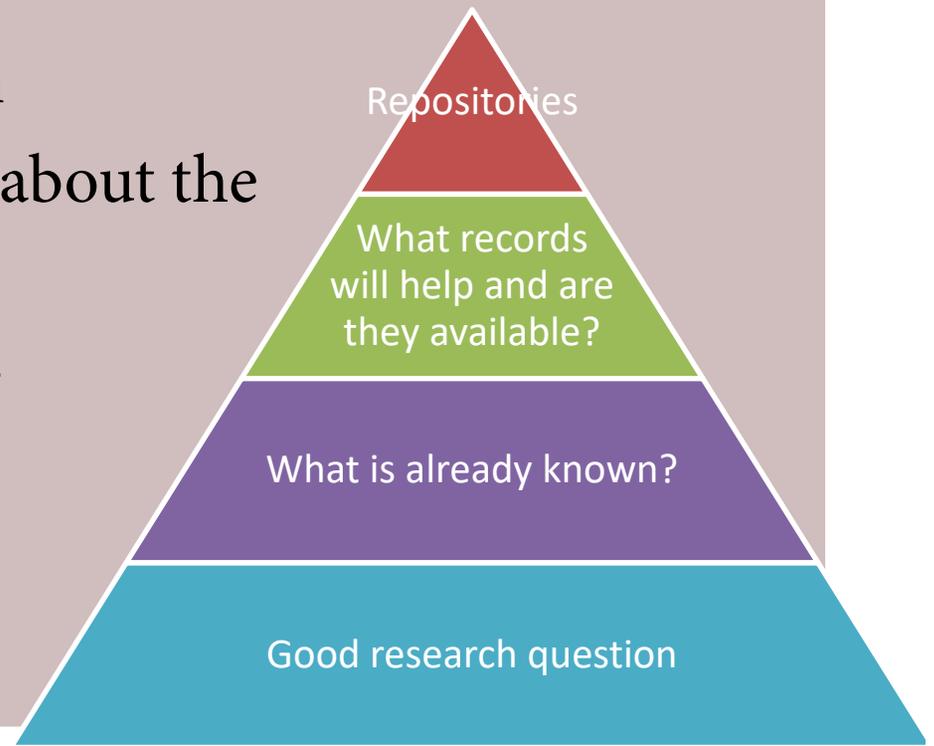
# Tip

**Start slowly.** Don't rush to answer all your questions at once.

**Don't skip generations** in planning your research; it only leads to misattributed people.

# Toolkit Item #3: Research Plan

- Research Plan: A roadmap for research
- Basic Components:
  - Good research question
  - What is already known about the question
  - List of potential records
  - List of repositories



Tip

Anchor your research  
to a *Xm̄q̄ i*, a *T̄p̄eḡi* and  
a *R̄eq̄ i*

## Step 3: Identify and Locate Your Sources

- Educate yourself – what types of records will supply the information you need?
- Make a list of records that will aid in your specific research
- Find resources in brick-and-mortar repositories and online repositories
- Map out your plan of action
- Don't forget the "Family Archives!"

# Standard Genealogy Records

- Census
- Vital Records
- Church and Cemetery Records
- Military Records
- Land
- Probate
- Passenger and Immigration Records
- Newspapers
- Counties Histories

# Records

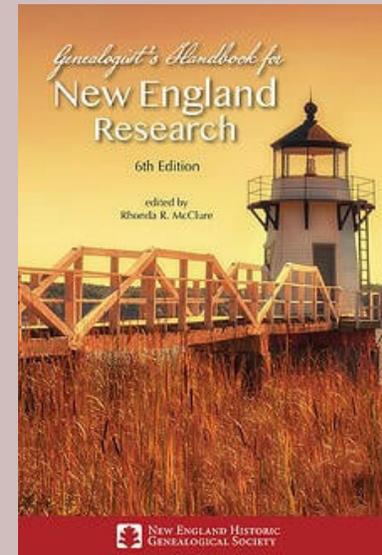
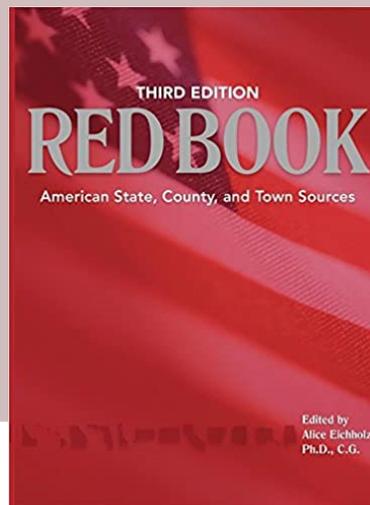
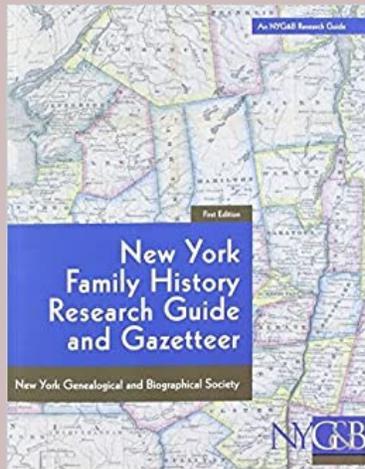
Information Needed	Search These Records First	Then Search These Records
Age	Census, Vital Records, Church Records, Cemeteries	Military Records, Taxation, Bible Records, Town Records, Emigration and Immigration
Birth date and place	Vital Records, Church Records, Census (for place), Town Records	Cemeteries, 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

# 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

# Use Finding Aids/ Research Guides

- Determine when record-keeping began
- Determine what repositories hold records
- Understand unique record types



# Step 4: Research!

- Begin answering your questions
- General principles
  - Consult multiple sources
  - Gather as many records about a family or individual that you can find
  - Track your work!

The Commonwealth of Massachusetts  
OFFICE OF THE SECRETARY  
DIVISION OF VITAL STATISTICS

369  
New Bedford  
(City or town)

County of Bristol

City or Town of New Bedford No. 449 Chancery Registered No. 2296  
(If birth occurred in a hospital or institution, give its NAME instead of street and number)

2 FULL NAME OF CHILD Robert Morris (If child is not yet named, make supplemental report, as directed)

3 Sex of Child M 4 Twin, triplet or other? XXXXXX 5 Born alive XXXXXX 6 Date of birth August 27, 1924  
(Answer only in event of plural births) (Month) (Day) (Year)

7 FATHER FULL NAME		8 MOTHER PRESENT NAME AND MAIDEN NAME <u>Mary A. Morris</u>	
9 RESIDENCE No. _____ ST. _____ (City or town)		10 RESIDENCE No. <u>Smith Place</u> ST. _____ <u>Cohasset, Mass.</u> (City or town)	
11 COLOR OR RACE	AGE YEARS	12 COLOR OR RACE	AGE YEARS
		<u>W</u>	<u>15</u>
13 BIRTHPLACE (City or town) (State or country)		14 BIRTHPLACE <u>Cohasset, Mass.</u> (City or town) (State or country)	
15 OCCUPATION		16 OCCUPATION <u>Student</u>	

17 Signature of Attendant at birth G. G. Pearce Physician  
(Name) (Physician, parent or other, etc)

Address No. 18 Seventh St., New Bedford  
(City or town)

Dated August 29, 1924 Did above-named personally attend the birth? Yes  
(Month) (Day) (Year)

18 Received at office of city or town clerk August 29, 1924  
(Month) (Day) (Year)

19 A true copy. Attest: Rodolphus A. Swan REGISTRAR

# Toolkit Item #4: Research Logs

- Keep track of what you have researched
- Categories of research logs
  - Person
  - Place
  - Family
  - Event
  - Repository
  - General
- What to include on a research log
  - Date of search
  - Source searched
  - Search objective
  - Search string
  - Results of search

# Research Log

## RESEARCH LOG

Repository: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Source Information</b> <small>(title, author, publisher, publication date, etc.)</small>	<b>Call Number</b> <small>(film number, URL, etc.)</small>	<b>Objective</b>	<b>Results</b>

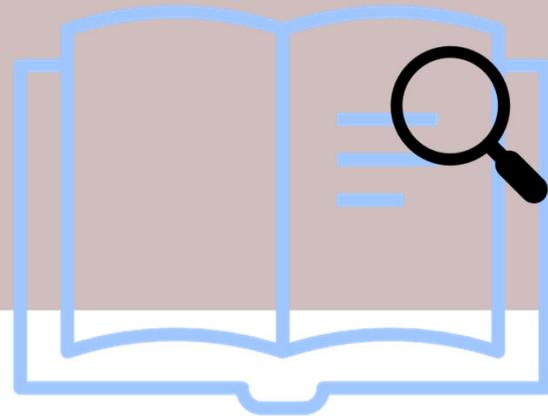


# Annotated Research Log – in Excel

Source	Repository	Objective	Time Period	Location	Type of Record	Finding	Notes	Citation
<b>Vital Records</b>								
<b>Census Records</b>								
1880 U.S. Federal Census	FHL	Crotty Family	1880	Eastchester		James, Elizabeth, Marcella, John, James, Jane, Thomas		"1880 U.S. Federal Census," Eastchester, Westchester, New York, population schedule, ED 95, page 25, family 233, household of James Crotty; online images viewed at <i>Ancestry</i> (ancestry.com : viewed 4 Feb 2008), citing NARA microfilm T9, roll 945.
1850 U.S. Federal Census	FHL	James Crotty	1850	New York		James, Eliza, Ellen	Ellen is 6 mos old, so she was born Feb 1850	"1850 U.S. Federal Census," New York (Ward 17), New York, Population Schedule, Page 274b, household of James Crotley; online image viewed at <i>Ancestry</i> (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M432, Rool 556
1860 U.S. Federal Census	FHL	James Crotty	1860	Eastchester		James Eliza, Ellen, John, James, Jane, Mary, Ellen	Ellen the elder is 76 years old, born in Ireland	"1860 U.S. Federal Census," Eastchester, Westchester, New York, Population Schedule, Page 89, household of Jas Crotty; online image viewed at <i>Ancestry</i> (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M653
1870 U.S. Federal Census	FHL	James Crotty	1870	Eastchester		James, Eliza, Marella, John, James, Jane, Thomas	Mary appears to have died	"1860 U.S. Federal Census," Eastchester, Westchester, New York, Population Schedule, Page 276b, household of James Crotty; online image viewed at <i>Ancestry</i> (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M593, roll 1114
<b>Cemetery Records</b>								
<b>Probate/Wills</b>								
<b>Newspapers</b>								
<b>Published Genealogies</b>								
<b>City Directories</b>								

# Step 5: Analyze

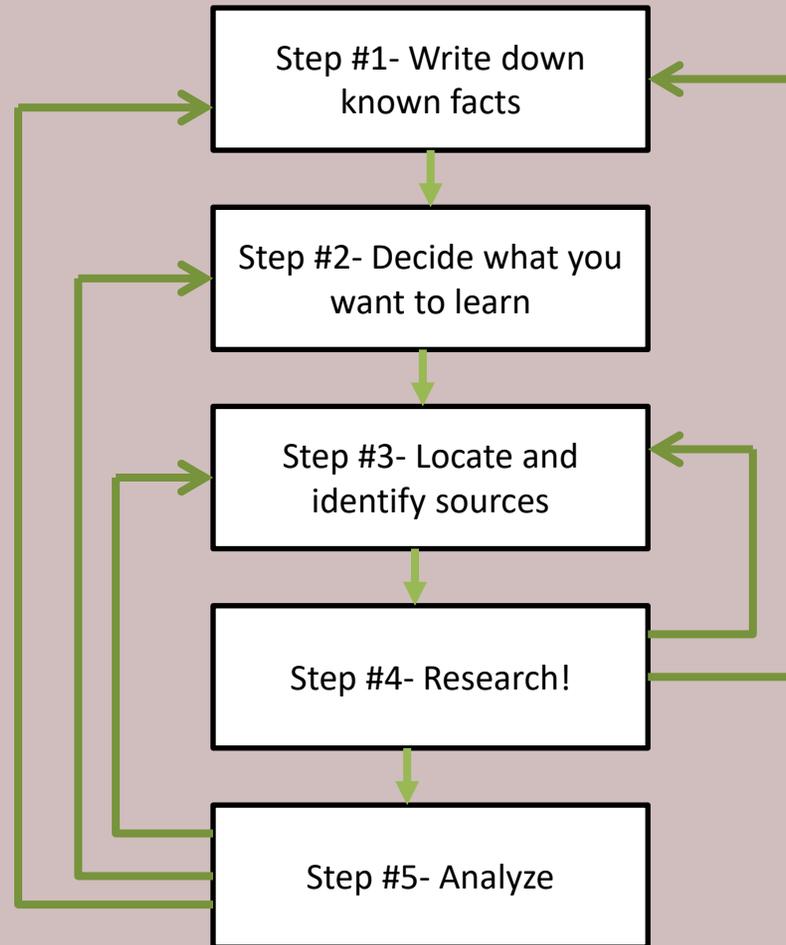
- Don't just read, examine
  - Does the record bring up new questions?
  - How accurate is the record?
  - How accurate is the source?
- Record the information you have
- Record the sources you use



# Principles of Analysis

- Are you looking at a original or derivative source?
- When was the record created, i.e. how soon after the event it is capturing?
- Who created the record? A participant? Someone else?
- Who provided the information?
- Which information is primary (firsthand knowledge) and which is secondary (secondhand knowledge)
- What information do I need to capture for a citation?

# Rinse and Repeat



# **Coming Up Next - Module 2 Learning About Records**



NEW ENGLAND HISTORIC  
GENEALOGICAL SOCIETY

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