Building Your Genealogical Skills
Part 2: Research
Module 3 – Research Planning

What to Research: Research Planning

What is a research plan?
A research plan provides a roadmap for your genealogical research. It includes a statement or question that defines your research goal and outlines the steps to achieve your research goal. This can be a formal statement or document but does not have to be.

Typical genealogical questions center on identity, events, and relationships. All of these are starting points for developing a research plan.

Begin your research plan by defining your goal and determining what you want to learn:

- Examine the information you have.
- What is missing?
- What individuals or families are the most intriguing?
- What family stories have I heard/what legends have been passed down?

Steps for Research Planning
A research plan helps you think systematically about your research. A successful research plan focuses on a single individual or couple and asks a single, focused question. It includes the following steps:

1. Determine Your Goal: What do you want to know?
2. Document the Known Facts: What do you already know about the subject of your research and the specific research question?
3. Educate Yourself About Records: What records are available for your time and place? What records are most likely to answer your question?
4. Create the Plan: Use a template to guide your thinking.
5. Search Strategy: Which repositories have the sources and in what order should I search?

1. Creating Research Questions
Your research question should be *specific:* identify a unique individual and identify exactly what you want to learn. Research questions typically focus on questions of identity (what makes a person unique), kinship, or events. The question should be tied to a place and time as all records are local and availability varies by location and time.

A good research question might ask "What are the origins of Elizabeth Powell?" but a better research question asks, "Who are the parents of Elizabeth Powell who married Martin Powell of Manchester Vermont in 1788?" The latter formulation places Elizabeth in the context of a place and time and focuses on a specific question of kinship.

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2. Documenting Known Facts

Research planning requires you to identify key information about the subject such as birth and death dates and places, spouse(s), and children. These anchor the subject to a *where* and *when*. You also need to identify what you already know about the research question and how you know it. Here you are distinguishing between facts and family lore. This helps you determine what new information you must seek.

3. Background Research

Perhaps the most important step in research planning is educating yourself about the types of records available to answer your questions and what information they might contain. Genealogical resources vary widely by geographical location and time period. Researching the town, county, and state (or country) where you ancestor lived is an important step in learning about what does and does not exist. Keep in mind that dates of formation/incorporation, previous names, boundary changes, and land grants can all effect where you look for records.

The section below, "Where to Research: Repositories" will help identify where you might find the records needed.

4. Create the Plan

A template such as found on AmericanAncestors.org (https://www.americanancestors.org/sites/default/files/2022-06/research-plan-template-2022.pdf) can help you capture all the necessary components of a plan.

5. Search Strategy

The final step is to map out the order of searching.

Where to Research: Repositories

Repositories, Records and Sources

Beginning genealogists sometimes get confused about the difference between records, sources, and repositories. A repository is a place where multiple sources are stored. A source contains multiple records and records contain one or more pieces of genealogical information. Think of nesting dolls or concentric circles.

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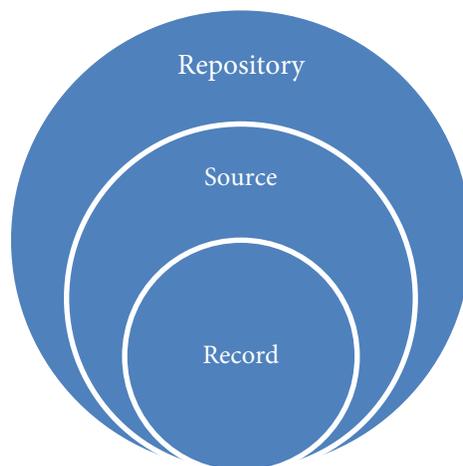
Perhaps the most valuable repository is your own house and the houses of your family. Other brick and mortar repositories include:

- Federal and State Archives
- Town or City Halls
- Local Historical Societies
- Public or Private Libraries

- College or University Archives
- Lineage Societies
- Genealogical Societies
- Regional Museums

The major online repositories include AmericanAncestors.org (NEHGS), FamilySearch.org, Ancestry.com, and Fold3.com. Warning: Not Everything is Online!

Online Repositories

To get the most out of an online repository, be sure to read the database descriptions. What are the places and time periods covered? Make liberal use of the site's catalog. Consult the research wikis or help files. The FamilySearch wikis (link below) are one of the best tools to help you understand what is available for a given time and place.

In terms of searching, "Less is More." Don't be too specific when starting a search; you can always filter your search as you go on. When you find something, look at the records before and after your target. Seek the original; don't trust the transcription (or indexing)

Resources: Finding Aids

1. FamilySearch.org Research Wiki – Check for information about the state, county, or town you are researching - https://www.familysearch.org/en/wiki/Main_Page

2. American Ancestors Research Guides - includes subject-specific guides as well as guides about New England towns. https://www.americanancestors.org/tools/research-guides

3. Rhonda R. McClure, *Genealogist's Handbook for New England Research, 6th edition (*Boston: New England Historic Genealogical Society, 2021)

4. The New York Genealogical and Biographical Society, *New York family history research guide and gazetteer* (New York, NY: New York Genealogical and Biographical Society, 2017)

5. Alice Eichholz, *Red Book: American State, County, and Town Sources* (Provo, Utah: Ancestry, 2004); see also https://wiki.rootsweb.com/wiki/index.php/Red_Book:_American_State,_County,_and_Town_Sources

6. Loretto Dennis Szucs and Sandra Hargreaves Luebking, *The Source: A Guidebook to American Genealogy* (Provo, UT: Ancestry, 2006); see also https://wiki.rootsweb.com/wiki/index.php/The_Source:_A_Guidebook_to_American_Genealogy

7. Town and County Histories – check online. Many of these were published prior to 1920 and thus are digitally available online.

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