

Genealogy Boot Camp

Session #1: Taking Action: How to Create a Research Plan

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What is a research plan?

A research plan is essentially a roadmap for genealogical research. It is a statement or question that defines your research goal, along with a strategy outlining 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?

Components of a Research Plan

1. A general goal/research question (*What am I trying to find?*)
2. Specific research objectives/research strategy (*How am I going to find it?*)
3. List of repositories (*Where will I look?*)
4. List of potential records and sources (*Where will I look?*)

Your research question should be *effective* and *specific*: identify a unique individual and identify exactly what you want to learn. A good research question might ask “What are the origins of Eva Bodnar?” but a better research question asks, “When and where in the Austrian-Hungarian Empire was Eva Bodnar (ca. Mar. 1867, Austria – 9 Oct. 1948 Brooklyn, New York) born?”

To develop a research strategy and carry it out effectively, you will need to do “pre-research” to familiarize yourself with the types of records available 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 your 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 affect where records are held.

What is a research log?

Research logs are documents used to keep track of what research has been done. They can be organized according to different categories, such as person, place, event, family, or repository. A research log should include the date of the search, the source searched, the objective, and the results. Templates can be found in the list of Research Plan & Research Log Templates below.

Genealogical Records by Information Type

| <i>Information Needed</i> | <i>Search These Records First</i> | <i>Then Search These Records</i> |
|---------------------------|---|--|
| Age | Census, Vital Records, Cemeteries | Military Records, Taxation |
| Birth date and place | Vital Records | Church Records, Census, Newspapers, Cemeteries, Published Genealogies |
| Country of foreign birth | Naturalization Records, Vital Records, Census | Military Records, Obituaries, Newspapers |
| Death date and place | Vital Records, Probate Records, Cemeteries | Obituaries, Newspapers, Church Records, Military Records, Published Genealogies |
| Foreign birth location | Vital Records, Naturalization and Immigration Records, Census | Newspapers, Church Records, Published Genealogies, Local Histories |
| Immigration date | Census, Immigration and Naturalization Records | Newspapers, Local Histories |
| Maiden name | Vital Records, Newspapers | Cemeteries, Church Records, Newspapers, Probate Records, Published Genealogies, Local Histories |
| Marriage date and place | Vital Records, Census, Newspapers, Church Records | Cemeteries, Military Records, Probate Records, Naturalization Records, Land Records, Court Records |
| Parents' names | Vital Records, Census, Probate Records, Published Genealogies, Obituaries | Newspapers, Land Records, Court Records, Naturalization and Immigration Records, |
| Places family has lived | Census, Land Records, Local Histories, Directories | Military Records, Taxation, Obituaries |

Genealogical Records by Date (U.S.)

| <i>Record Type</i> | <i>Creator</i> | <i>Approx. Dates</i> | <i>Comments</i> |
|---|------------------------|-----------------------|--|
| Census | Federal, State | 1790-1950 (Federal) | Varies by state |
| Vital Records | State, Local | Mid-19th c. – present | Varies based on location, oldest records are from New England; Local usually older than state |
| Cemeteries | Local | 17th c. - present | |
| Military Records | Federal, State | 18th c. - present | |
| Taxation | Local | 18th c. - present | Access varies by location |
| Immigration and Naturalization | Federal, State, County | 18th c. - present | Passenger lists generally begin mid-19th c., naturalization recs. more complete beginning 1906 |
| Obituaries and Newspapers | Local | 18th c. - present | |
| Published Genealogies and Local Histories | Local | n/a | |
| Church Records | Local | 17th c. - present | Access varies by location |
| Land Records | County (usually) | 17th c. - present | Early records may be granted by state or federal government |
| Court Records, Probate Records | County | 17th c. - present | |
| Directories | Local | 18th c. - present | Urban areas, access and availability varies by location |

Research Plan & Research Log Templates

“Ten-Minute Methodology: How to Ask Good Research Questions,” Harold Henderson,

<https://bcgcertification.org/ten-minute-methodology-how-to-ask-good-research-questions/>

“Research Templates,” AmericanAncestors/NEHGS,

<https://www.americanancestors.org/tools/research-templates>

“Research Plan Template,” Angela Packer McGhie,

<https://genealogyeducation.blogspot.com/2015/08/research-plan-template.html>

“Research Plan,” Erin Williamson Klein, <https://myfamilyhistoryfiles.com/category/research-plan/>

“Free Genealogy Forms,” Family Tree Magazine, <https://familytreemagazine.com/freeforms/>

“Family History Forms,” Midwest Genealogy Center,

<https://www.mymcpl.org/genealogy/resources/family-history-forms>

“Free Printable Charts and Forms,” Cyndi’s List, <https://www.cyndislist.com/free-stuff/printable-charts-and-forms/>

Resource Guides Online

FamilySearch Research Wiki, https://www.familysearch.org/wiki/en/Main_Page

“Where to Write for Vital Records,” National Center for Health Statistics, <https://www.cdc.gov/nchs/w2w/index.htm>

Atlas of Historical County Boundaries, Newberry Library, <https://digital.newberry.org/ahcb/>

Historical Atlases and Maps of U.S. and States, <https://www.mapofus.org/>

“U.S. State Census Table,” Family Tree Magazine, <https://familytreemagazine.com/records/census/state-censuses-list/>

“Vital Records Chart,” Family Tree Magazine, <https://www.familytreemagazine.com/wp-content/uploads/2017/08/vitalrecords.pdf>

Resource Guides in Print

Rhonda R. McClure, *Genealogist’s Handbook for New England Research*, 6th ed., (Boston: NEHGS, 2021) <https://shop.americanancestors.org/collections/new-england-resources/products/genealogist-s-handbook-for-new-england-research-6th-edition-pre-sale>

Naomi Joshi, et. al., *New York Family History Research Guide and Gazetteer*, (New York: NYG&B, 2017)

Loretto Dennis Szucs and Sandra Hargreaves Luebking, *The Source: A Guidebook to American Genealogy*, (Provo, Utah: Ancestry, 2006)

Alice Eichholz, *Red Book: American Town, County, and State Resources*, (Provo, Utah: Ancestry, 2004)

Record Analysis

Once you’ve carried out your research plan and updated your log, analyze what you’ve found. Don’t just read your documents—examine them. Analyze records individually and alongside others. Ask yourself:

- Does the record bring up new questions?
- How accurate is the record?
- How accurate is the source?

Also consider:

- Are you looking at an original or derivative source?
- When was the record created, i.e. how soon after the event it is capturing?
- Who created the record? Who provided the information?

- Which information is primary (firsthand knowledge) and secondary (secondhand knowledge)?
- What information do I need to capture for a citation?

After analyzing your research, record and draw your conclusions, writing a research summary or proof standard as needed.