

Getting Organized: Research, Files, Findings

Class 1: Organizing Your Research

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(Original work compiled by Ann G. Lawthers)

Organizing your research begins with creating a research plan. A research plan helps you think systematically about your research. For organizing the research process, several forms simplify the tracking and recording activities.

The Research Plan

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. Do Your Background Homework: 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. Execute and Fine Tune: As you uncover information, you will refine your plan.

The steps are described in more detail below. The Research Planning Template is included with the class materials.

Steps for Planning

1. Craft A Good Research Question

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 tethered to a place and time as all records are local and availability varies by location and time.

The more specific you make a research question, the easier it will be to make a plan, but also to ultimately find an answer. 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 context of a place and time and focuses on a specific question of kinship.

2. Identify What You Know

At this step it is tempting to write down everything you have learned over the course of researching; however, you only need to capture a few details about the research subject and more information about the question being investigated.

a. Subject

For the research subject it is helpful to put together a mini genealogical sketch for quick reference. You need it to set the stage for the “where” and “when” of your research problem. List the vital events associated with your subject with attention to the place where the events occurred. Name the spouse. Give the names and dates of births of the children. Identify any major migrations as records are specific to a place and time.

b. Question

When summarizing what you know about the research question make sure you include how you learned the information. For example, if you believe the mother of the subject is “x”, be sure to note that you deduced this from the U.S. Federal Census or found it in a pertinent vital record.

3. Do Your Homework

Now settle in for some homework.

1. Learn all you can about the record availability for the place and time you are researching.
2. Learn about the geography of the place and time you are researching (get a map).
3. Identify which records are most likely to have your answers.
4. Where will you find the records (e.g., which repository)?

a. Review geographic and municipal factors

Determine when the county and town were formed and how the incorporation date(s) impact the location of records. This is especially important when researching records in the 19th century or earlier. Excellent resources to consider:

- ***Genealogist’s Handbook for New England Research***
6th ed. edited by Rhonda R. McClure
- ***New York Family History Research Guide and Gazetteer***
New York Genealogical and Biographical Society
- **MapofUs.org** for county boundary changes
- **Atlas of Historical County Boundaries, Newbury Library**

Don’t forget to investigate the possibility of record loss in your area. Check the *Family Search* Research Wiki for the relevant county specific articles.

b. Learn about the geography

This helps you understand settlement and migration patterns. In the colonial period, mountain chains frequently impeded movement, so taking note of the regional topography.

c. Working Hypotheses

Third, list a series of working hypotheses about your research. These will help you when you begin the process of listing potential records. The working hypothesis may be what you think the answer is, or where you think you will find the answer, or what you believe is a fruitful strategy for finding the answer.

d. Determine which records are most likely to have the answer.

Some questions have a natural hierarchy of records to search. For example, when looking for a maiden name, the marriage record is the obvious first place to start. Next a woman's death record may include her maiden name, if her parents are named. Third, a child's birth, marriage or death record may include the mother's maiden name, if the informant knew it.

For parent names, start with the birth and death records of the subject and their siblings. Move on to census records, probate, land, newspapers, and county histories. As always, the time period dictates the choice of record. Early marriage records (before about 1850) tended not to include the names of parents.

Information Needed	Search These Records First	Then Search These Records
Age	Census, Vital Records, Cemeteries	Military Records, Taxation
Birth date and place	Vital Records	Cemeteries, Newspapers, Census
Marriage date and place	Vital Records, Census, Newspapers	Cemeteries, Military Records, Naturalization
Death date and place	Vital Records, Cemeteries, Probate Records, Newspapers	Bible Records, Military Records
Immigration date	Census, Immigration, Naturalization	Newspapers, Biographies
Country of foreign birth	Naturalization Records, Vital Records, Census	Military Records, Vital Records, Newspapers
Foreign birth location	Vital Records, Published Genealogies, Immigration and Naturalization, Census	Newspapers, Histories
Places family has lived	Census, Land, Local Histories, Directories	Military Records, Taxation, Obituaries

e. Determine the location of the records

Keeping in mind what you have learned about jurisdictions and record availability, identify where the records you need may be found. In the case of online resources, include the database name and FSL (FamilySearch Library) film number, as applicable.

f. Order your search

You may order your search by repository or perhaps by your expected likelihood of success, tackling the low hanging fruit first.

4. Complete the plan

Finish filling out the Research Planning Template. Transfer sources to be searched to your Research Log.

5. *Research and refine the plan*

As you begin to research to may refine or generate new hypotheses. This in turn creates new databases to search. So, your plan will typically be modified as you proceed.

Tracking Research

Whether you use a pre-formatted form, a computer program, or a spiral notebook, it's important to list every resource you have checked and the information you did *and did not* find. Keeping track of your negative searches is critical to avoid duplicating your work.

For land research, you may need a modified research log to keep track of all the potential deeds that your ancestor had.

Recording Research

Land and probate records contain considerable boilerplate language. Additionally, reading land and probate records may be challenging because of handwriting styles. Using an abstract form can help you find and record the pertinent facts from a document.

Resources

Guides, Maps and Other Aids

Rhonda R. McClure, [*Genealogist Handbook for New England Research, 6th Edition*](#) (Boston, NEHGS, 2021).

American Ancestors, “Town Guides” <https://www.americanancestors.org/tools/town-guides>

Library of Congress [Digital Collections: Maps],
<https://www.loc.gov/collections/?fa=partof:geography+and+map+division>

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

Norman B. Leventhal Map & Education Center, <https://www.leventhalmap.org/>

Research Methods:

Cyndi’s List, Research Methodology: <https://www.cyndislist.com/research-methodology/>

Templates and Forms

Research Plan Template - <https://www.americanancestors.org/sites/default/files/2026-01/research-plan-template-2026.pdf>

Research Log Template - <https://www.americanancestors.org/sites/default/files/2026-01/research-log.pdf>

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

Cyndi’s List, Charts and Forms: <https://www.cyndislist.com/charts/>