

# "Plan Your Way to Research Success"

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Stay in control of your research! Don't let it control you!

## What is a research plan?

A research plan is a document you create that acts as a guide to lead you to the records that will help provide genealogical answers. A research plan is well-thought out and helps you to stay on track when you research online, at a repository, library or any other place. For instance, you can do a research plan for a cemetery by writing down all the names and dates you are trying to locate ahead of time.

The process of creating a research plan involves:

- Thoughtful planning
- Setting goals
- Working to achieve goals
- Recording your findings

Creating a research plan step-by-step:

- Choose a project – an individual or family
- Choose a specific goal or objective
- What questions need answered?
- What do you already know?
- Seek out research guidance
- Write down the steps to achieve your goal

While all the steps are important, seeking out research guidance is one of the most important. When you start a new project you will not know what records are available nor where to find them. Research guidance books and websites will find these answers.

Some research guidance tools include:

- FamilySearch Wiki (online at <http://wiki.familysearch.org>)
- Ancestry's *Red Book* (online at <https://search.ancestry.com/search/db.aspx?dbid=3249>)
- Family History Library Catalog (online at <https://familysearch.org/eng/library/fhlc/>)

- Legacy Family Tree Research Guidance (located inside Legacy Family Tree software)
- Region Specific Guides – for example, *The Genealogist's Handbook for New England Research* edited by Michael Leclerc, 5<sup>th</sup> edition.

The FamilySearch Wiki has international locations. When researching in Europe, Canada and other locations outside the United States you will need to seek out books specific to those regions.

If you have a brick wall challenge you may benefit from creating your own guidance document for the time period and place(s) of your brick wall ancestor. You can use information headings in Ancestry's Red Book or the FamilySearch Wiki as the inspiration for your personal guide.

### **Researching Online**

You may not think you need a research plan to research online but that is truly one of the best times to use one. Online searches and databases produce a lot of "noise" – information that seems relevant to your ancestor but isn't. Stay in control by determining what databases you want to use ahead of time and what search criteria you will use to find information. With an internet search be sure to keep track of the search phrase you used (write it down in your plan!) to find information as well as the individual urls (internet address) where the information is found.

### **Further Reading:**

Greenwood, Val D. *The Researcher's Guide to American Genealogy*. Third edition. Baltimore: Genealogical Publishing Company, 2000.

Leary, Helen F.M. "Problem Analyses and Research Plans." *Professional Genealogy*. Elizabeth Shown Mills, ed. Baltimore: Genealogical Publishing Company, 2000. Pages 259-272.

Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. Baltimore: Genealogical Publishing Company, 2007.

I hope you have enjoyed the presentation!

If you have any questions about Research Plans feel free to contact me.

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## **Sample Research Plans**

1. Sample Mini Locality Guide
2. Blank Locality Guide
3. Sample Probate Research Plan Task List
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5. Sample Master Research Plan
6. Blank Master Research Plan
7. Sample Database Research Plan
8. Blank Database Research Plan
9. Sample Internet Research Plan
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If you would like the research plans in MS Word format so that you can edit and type in them, please email your request to [contact@marianpierrelouis.com](mailto:contact@marianpierrelouis.com). I would be happy to send you the files.

<b>Mini Locality Guide</b> <b>Medway, MA 1850 - 1910</b>		
<b>Record Type</b>	<b>Source</b>	<b>Availability</b>
Vital Records	Medway Town Hall; Massachusetts Registry of Vital Records	AmericanAncestors.org Ancestry.com (Holbrook Collection)
Land Records	Norfolk County Registry of Deeds	649 High Street, Dedham, MA or <a href="http://www.norfolkdeeds.org/">http://www.norfolkdeeds.org/</a> (indexed back to 1900)
Probate Records	Norfolk County Probate Court	35 Shawmut Road, Canton, MA Index to 1900 available on Ancestry.com
Cemetery Records	Evergreen Cemetery Oakland Cemetery St. Joseph's Cemetery	Transcriptions available; see <i>A Researcher's Guide to Massachusetts Cemeteries</i> for details

<b>Mini Locality Guide</b>		
	<b>Location:</b>	<b>Time Frame:</b>
<b>Record Type</b>	<b>Source</b>	<b>Availability</b>
Vital Records		
Land Records		
Probate Records		
Cemetery Records		
Church Records		
Census Records		

Sample Probate Research Plan Task List

<b>Ancestor:</b> Phebe Sisson		<b>Date:</b> 1 May 2012
<b>Task:</b> Check Portsmouth, RI Probate Records for family members		
Source: Town Record Books, Portsmouth Rhode Island		
Location: Portsmouth Town Hall, Portsmouth, Rhode Island		
<b>Research Plan:</b>		
<b>Task</b>	<b>Found Y/N</b>	
People to search for in probate:		
Phebe Sisson (1774-1841)		
David Albro Jr. (1770-1849)		
<b>Parents</b>		
George Sisson (1734 – 1811)		
Mary Hall (1734-1830)		
<b>In-laws</b>		
David Albro Sr. (1736-?)		
Elizabeth Coggeshall (1738-?)		

Blank Probate Research Plan Task list

<b>Ancestor:</b>		<b>Date:</b>	
<b>Task:</b>			
Source:			
Location			
<b>Research Plan:</b>			
<b>Task</b>		<b>Found Y/N</b>	
People to search for in probate:			

Sample Master Research Plan

<b>Ancestor:</b> Phebe Sisson		<b>Project Start Date:</b> 1 May 2012
<b>Specific Goal:</b> Confirm published facts; determine what her life was like in Portsmouth, Rhode Island		
<p><b>Questions:</b>          What was her life like beyond birth, marriage and death?          Who were the important people in her life – FANs?          What historical events impacted her life?          Can I find any new details about her life?</p>		
<p><b>Background Information:</b>          Birth: 30 October 1774, Portsmouth, Rhode Island          Death: 9 April 1841          Parents: George Sisson (1734 – abt. 1830) and Mary Hall (1734-1830)          Married David Albro Jr. 13 October 1796, Middletown, Rhode Island son of David Albro Sr. Elizabeth Coggeshall          Phebe is mentioned in <i>Descendants of Richard and Mary Sisson ten generations from 1608</i> by Joan and David Sisson (1999)</p>		
<b>Research Plan:</b>		
<b>Task</b>	<b>Source</b>	<b>Location</b>
Confirm birth date	Portsmouth, Rhode Island vital records and indexes	Portsmouth, RI Town and on microfilm: Marriage index A-V 1636-1850; marriage index A-Z 1850-1975; Birth and death index 1637-1850; Birth index A-Z 1850-1975; Death index A-Z 1850-1975; Births 1854-1899; and, Marriages 1850-1899 [Portsmouth, Rhode Island] - FHL US/CAN Film [ 2208563 ]
Confirm marriage date		
Confirm death date		
Identify births of children		
Search for probate records for: David Albro Jr., Phebe Sisson George Sisson and Mary (Hall) Sisson David Albro Sr. and Elizabeth (Coggeshall) Albro	Town of Portsmouth Probate Records	Portsmouth, RI Town Hall and on microfilm Probate records, 1824-1919, Probate records v. 2-5 1834-1868 - FHL US/CAN Film [ 946799 ]
Search for land records for: David Albro Jr., Phebe Sisson George Sisson and Mary (Hall) Sisson David Albro Sr. and Elizabeth (Coggeshall) Albro	Town of Portsmouth Land Records	Portsmouth, RI Town Hall or microfilm: multiple films start with indexes Grantee and grantor indexes to land evidence records 1637-1900 - FHL US/CAN Film [ 945374 ]
Church Records	Society of Friends, Monthly Meeting records, 1638-1899	Rhode Island Historical Society or microfilm: Men's minutes, 1773-1807 - FHL US/CAN Film [ 22418 ] Men's minutes, 1807-1874 - FHL US/CAN



		Film [ 22419 ] Women's minutes, 1690-1801 - FHL US/CAN Film [ 22415 ]; Women's minutes, 1801-1868 - FHL US/CAN Film [ 22416 ]
Locate gravesite for Phebe Sisson and David Albro Jr.	Rhode Island Cemeteries Database	Partial online - <a href="http://ricemeteries.tripod.com/">http://ricemeteries.tripod.com/</a> Full version RI Historical Society
Literature search for Sissons	PERSI, NEHGS	Online on Heritage Quest NEHGS Online Catalog
Search for local history books for the town of Portsmouth and the county of Newport, Rhode Island	Various catalogs: HeritageQuest, NEHGS, local libraries	Online on Heritage Quest NEHGS Online Catalog
Manuscript search for Sissons	Rhode Island Historical Society Collection	RIHS
Manuscript search for contemporary diaries or accounts (doctors, midwives, etc)	Rhode Island Historical Society Collection	RIHS
Maps	Various	Library of Congress website; Ancestry.com; Boston Public Library online

Blank Master Research Plan

<b>Ancestor:</b>		<b>Project Start Date:</b>
<b>Specific Goal:</b>		
<b>Questions:</b>		
<b>Background Information:</b>		
<b>Research Plan:</b>		
<b>Task</b>	<b>Source</b>	<b>Location</b>


Sample Database Research Plan

<b>Ancestor:</b> Phebe Sisson		<b>Project Start Date:</b> 1 May 2012	
<b>Specific Goal:</b> Ancestry.com record Search for Phebe Sisson			
<b>Background Information:</b> Birth: 30 October 1774, Portsmouth, Rhode Island Death: 9 April 1841 Parents: George Sisson (1734 – abt. 1830) and Mary Hall (1734-1830) Married David Albro Jr. 13 October 1796, Middletown, Rhode Island son of David Albro Sr. Elizabeth Coggeshall			
<b>Database Research Plan:</b>			
Database	Source	Found	Y/N
US Federal Census 1790 [search George Sisson]			
Notes:			
US Federal Census 1800 [search David Albro]			
Notes:			
US Federal Census 1810 [search David Albro]			
Notes:			
US Federal Census 1820 [search David Albro]			
Notes:			
US Federal Census 1830 [search David Albro]			
Notes:			
US Federal Census 1840 [search David Albro]			
Notes:			
Landownership Maps [Portsmouth, RI]			
Notes:			
Other:			
Notes:			

Blank Database Research Plan

<b>Ancestor:</b>		<b>Project Start Date:</b>	
<b>Specific Goal:</b>			
<b>Background Information:</b>			
<b>Database Research Plan:</b>			
<b>Database</b>	<b>Source</b>	<b>Found Y/N</b>	
Notes:			
Notes:			
Notes:			
Notes:			
Notes:			
Notes:			
Notes:			

Sample Internet Research Plan

<b>Ancestor:</b> Phebe Sisson		<b>Project Start Date:</b> 1 May 2012	
<b>Specific Goal:</b> General internet search for Phebe Sisson			
<b>Background Information:</b> Birth: 30 October 1774, Portsmouth, Rhode Island; Death: 9 April 1841 Parents: George Sisson (1734 – abt. 1830) and Mary Hall (1734-1830) Married David Albro Jr. 13 October 1796, Middletown, Rhode Island son of David Albro Sr. Elizabeth Coggeshall			
<b>Research Plan:</b>			
<b>Search Criteria: “Phebe Sisson” +1774</b>		<b>Search Engine: Google</b>	
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>Search Criteria: “Phebe Sisson” +1841</b>		<b>Search Engine: Google</b>	
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>Search Criteria: “Phebe Sisson” +Middletown</b>		<b>Search Engine:</b>	
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			

Blank Internet Research Plan

<b>Ancestor:</b>		<b>Project Start Date:</b>	
<b>Specific Goal</b>			
<b>Background Information:</b>			
<b>Research Plan:</b>			
<b>Search Criteria:</b>		<b>Search Engine:</b>	
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>Search Criteria:</b>		<b>Search Engine:</b>	
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			
<b>Search Criteria:</b>		<b>Search Engine:</b>	
<b>URL</b>	<b>File Saved As or Printed</b>	<b>Found Y/N</b>	
<b>Notes:</b>			