

# Research Strategies

**"Far too many would-be genealogists are attacking their genealogical problems in a haphazard manner without regard to method, procedure or system."**

**Wright, Norman E. and David H. Pratt, *Genealogical Research Essentials*, Salt Lake City: Bookcraft, Inc., 1968, p. 37.**

## **Framing the Research Problem**

**How you frame the research problem determines your success and drives your strategy, specifically:**

- **What records you search**
- **The order in which you search those records**
- **Which archives you visit, and**
- **The order in which you plan your visits, especially if you are traveling abroad**

## **Strategy for a Sound Beginning**

**Do:**

- **Start from the known and work toward the unknown**
- **Analyze and compile what you know**
- **Trace one family line at a time**
- **Write out your research plan**
- **Take complete notes**
- **Cite your sources**
- **Keep an accurate, up-to-date log of the records searched**
- **Prove that each ancestor you claim is truly your own**

**Don't:**

- **Do not use secondary sources to the exclusion of primary sources**
- **Do not "translate" names or dates into contemporary usage**
- **Never attempt to abstract a document you do not fully understand**
- **Do not use married women's social names**

## **Primary Sources**

**Not all primary sources are equal. The quality of the primary source depends on:**

- 1. Who was the most likely to have known the true facts.**
- 2. Who was the most capable of recording those facts accurately**
- 3. Who did record them closest to the time and place in which the event occurred**
- 4. Who made the record for the specific purpose of documenting the event**

## **Ranking Primary Sources**

- **Original Record**
- **Authoritative Transcriptions**
- **Contemporaneous Official Copies**

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- **Other Contemporaneous Accounts**

### **Original Records**

First record of an event takes precedence over later accounts of the same event, and over any subsequent copies of the first record.

An original will is the earliest official record of the testator's instructions about the disposition of his or her estate. The probate copy entered in a record book is a copy, and although it is primary, it is not the original record.

### **Authoritative Transcriptions**

Done by trained experts in handwriting, language, legal forms & customs are more dependable than a transcription by an average researcher. These transcriptions will include all the information in the original, but it can be read with ease.

### **Contemporaneous Official Copies**

Includes wills, deeds and similar records entered in county, state & federal record books, as well as later copies marriage & birth certificates. They should not be confused with microfilmed, photographed, or photocopied documents, which may not be as clear as the originals, but rank with them. Like any copy, official ones may have incorporated errors, and researchers should be alert to that possibility.

### **Other Timely Accounts**

Information about an event can be found in newspapers, reminiscences, oral-history accounts, tombstone inscriptions, letters, obituaries, and a host of other written and unwritten records. If they originated during the primary period relative to that event, they are primary records. If information in these sources conflicts with that in documents of higher rank, the dispute must be resolved with evidence from other primary sources.

### **Secondary Records**

The secondary status of sources may be caused by the intervention of time between the event and the recording of it, or by the intervention of a person who interpreted or rearranged the primary data. Histories, genealogies, and biographies, for example, are secondary sources for both reasons: with few exceptions, they were written long after the time period of the events they describe, and somebody, namely the compiler, stands between the reader and the primary records.

Secondary records should not be used in place of primary ones, but they should be used. Good quality histories, genealogies, and compilations of county or state records allow a researcher to cover large areas of the state and long periods of time more quickly than examining the individual, scattered primary records would allow. Often, secondary source information is needed to interpret primary data accurately, i.e., the definition of a legal term in a reputable legal dictionary.

## **Ranking Secondary Sources**

1. Transcriptions
2. Abstracts
3. Documented Compilations
4. Selected Transcriptions and Abstracts
5. General Histories
6. Undocumented Compilations

## **EVALuating Secondary Data**

- Accuracy
- Completeness
- Documentation
- Presentation
- Sophistication

## **Mixed Sources**

Some of the sources genealogists and local historians use are mixed, that is, they include both primary and secondary information. These are often the most difficult to use well because the mixture is not always readily apparent, and because the researcher's reasons for seeking that source must be considered when evaluating the nature of particular data.

## **Strategy for Continuing Research**

- Determine the time and place of the life event you are researching
- Locate the basic reference tools you will need
- Investigate library resources

## **Strategy for Family Records**

- Living memory is largest single asset of genealogical information in the world
- Minimum of information that should be recorded:
  - Name
  - Birth Date and Place
  - Death Date and Place
  - Marriage Date and Place
  - Children (and name of spouse)
  - Biographical Information

## **The First Steps**

- Organize a logical, flexible, expandable filing system in a manner to be able to retrieve documents already collected
- Conduct family interviews beginning with the oldest ones first, but do not overlook others of your age who had more access to some relatives. Family interviews are particularly

important for ethnic groups with strong oral traditions. Family tradition is also known as “oral history”.

### **Strategy for Vital Records**

- Include siblings
- Understand that information on certificates is not supplied by the individual themselves with the exception of marriage certificate
- Information on certificate is only as good as the informant
- Informant may or may not be related
- Establish relationship of the informant for establishing quality of information

### **Strategy for the Census**

- Most widely used genealogical source for most areas
- Usually provide a wealth of data that is easily recognizable
- Most instances provide a wealth of data not recognizable
- Examine every census during which an ancestor was known to be living
- Search the households of each member of the family in collateral lines in the area (all instances of the same surname)
- Within the Census Schedule
  - Indications of other marriages
  - Age for military service
  - Slaves
  - Evidence of migrations
- Compare information in multiple census records
  - Additional/conflicting information about birth
  - Evidence concerning relationships
  - Evidence of group migrations
  - Compare census info with rest of ancestor’s records
- Compare census information with rest of ancestor’s records

### **Strategy for Pre-1850 Census**

- Do not assume that the oldest male in the household was the person named as “head of household”
- Do not assume that all child-aged persons in the household were the ancestor’s children
- Do the mathematical calculations necessary to narrow birth date brackets of everybody in the household
- Compare data between census years

### **Strategy for Land Records**

Land records are among the most overlooked, but a most important of genealogical records. They can identify an immigrant’s origins or “address” (land boundary description). They are of great

value in distinguishing among several persons of the same name in the county, and they often prove relationships. As with other records, it is important to know something of their legal background.

### **Land Records Background**

- Age limitations
- Gender limitations
- Dower limitations
- Recording limitations

### **Strategy for Tax Records**

- Tax lists are frequently substituted for missing census schedules, but there is a major difference between the two. A census enumerates the people living together in the same household, while tax records list the individual's real estate and personal property with taxes due.
- Census and tax lists may not include the same people.
- An older head of the household will not be taxable, but the younger male members of the household will be
- Each year's tax list must be checked for changes in property and location
- If the list is not in alphabetical order, check the families listed before and after for neighbors which may become witnesses on land deeds, wills or members of the family

### **Compare Tax Lists For:**

- The new appearance of a landless poll
- Evidence of out-migrating or in-migrating families
- Evidence that a person was under or over taxable age
- Evidence of civil status

### **Compare Tax Data with Census Information**

- Correlation of data about householders (Before & After 1850 census)
- Correlation of data about slaves

### **Compare Tax Records with Wills & Estate Records**

- Evidence of the identities of deceased and his/her heirs
- Evidence about slaves

### **Strategy for Wills**

#### **Background**

- Wills are a one form of a probate record.
- The great majority of wills are filed in the state where they died.
- Very few testators were women.
- Testator must be of sound mind, of legal age and free of restraint
- Most Informative and Most Misleading

- Less rigid in form and content than deeds
- Less rigid in form and content than deeds
- Can be more informal with more latitude
- Allows expression of personality, preferences and prejudices
- Changing customs and lexicology leads to misinterpretations and missed clues

### **Actions**

1. If the surname is not common, examine all will for the surname.
2. Determine from the census which men were the right general age to have been the ancestor's father.
3. Determine the earliest the father can have died by subtracting about nine months from the ancestor's birth.
4. Determine the latest the father probably died by adding about fifty years to the ancestor's birth year.

### **Strategy for Burned Counties**

- By the calculations of the FamilySearch Collection Management there are 643 counties in the US that are considered "burned counties".
- Not every record in the county has been destroyed
- Several jurisdictional levels for each spot of ground, when considering the land covered by a county, the number multiplies
- What records were not in the courthouse when the disaster occurred

### **Records not in the Courthouse**

- Surviving County Records
- Census
- Newspapers
- Records in Private Keeping
- State-level Records
- Federal-level Records
- Manuscript Collections and Private Archives
- Records for Adjoining Counties
- Non-genealogical Publications
- Help from Living Individuals

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