

Developing ~~Good~~ Successful Research Habits

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Developing good, make that successful, research habits makes you an efficient and effective family history researcher. Successful research takes education, analysis, planning, time, experience, and patience. This session will give you steps and tools for becoming a better researcher, both at home and in repositories. Have you purchased and READ the helpful and common sense *Genealogy Standards* (Board for Certification of Genealogists, 50th Anniversary Edition, Nashville, TN: Ancestry.com, 2014)? None of us is perfect, thus we need to develop “good” habits and if one or two of your research habits do become perfected, then you have achieved something special. Even perfection needs to be tweaked once in a while.

Each family, situation, time period, locality, record, and repository is different. You may have interpreted the title expecting that I would tell you exactly how to do the research, step-by-step. In a way, I am sharing that detail, but not as directly as you might think. Good research habits encompass a broad range of necessary parts. Bad habits come easily. Strive to develop the good habits and your family history research is more likely to be successful.

1. First impressions

The first time viewing a record, a family group sheet, photograph, a scrapbook or anything with family information – whether it is online, a photocopy, or an original – is the time to make notes. Those first impressions and research ideas don’t resurface, at least not immediately.

2. Your own notes

If you can’t decipher your own handwriting or printing, use the computer to make your notes. Your research habits needn’t be slowed down as you try to read the words you scribbled. A typed task list, abstract, or transcription will be easier and quicker to read in the library.

3. Your work area and files

An effective researcher is organized. Files and specific family details are easily located. Notice I did not say your work space and organization have to be perfect. Ask a friend or family member to lend a helping hand or eye to help get this area under control.

4. Written by others

Is there a guidebook written about your ancestral locality, a specific repository, a type of record, or the pertinent ethnic group? Have you even checked! Read the scholarly genealogical periodicals and pay attention to the review sections. These are usually in-depth reviews done by professionals who know the subject or locality. When was the last time you did even a quick reading of a “how to” genealogy guide?

5. Don't overwhelm yourself

Select one or two problems or parts of the greater family to attack at one time. Don't try to work on all your lines in all time periods at the same time. You need to dedicate research time to specific tasks, not to hopping around from one relative, locality, or record to another. Consider using a kitchen timer or the timer on your phone to limit online searching time. You know why!

6. Keep up-to-date

A dedicated genealogist striving to do thorough work on the family keeps up-to-date on the changes in genealogy. This is done by reading periodicals, attending lectures, talking to others, and subscribing to electronic newsletters, blogs, and databases. Don't forget to take advantage of other educational opportunities such as webinars and online lessons. Learning about new guidebooks, databases, digitized records, indexes, or record abstracts is a successful research habit.

7. Use your friends

Ordinarily I would not suggest such a ploy, but “use” your friends. If you truly have good research habits you know you can't do it alone. Use your genealogical friends to help solve research dilemmas. A fresh set of eyes and a brain not swayed by some details might come up with good research angles. Pay them back by reviewing their information.

8. Alternatives

Can you name three alternative sources to the 1890 census? What about city directories, school census, tax records, voter records, and church records? Yes, that is five – but this is only the beginning of a list. Good research habits include the knowledge of other sources to consult when the one you originally sought is not readable, does not exist, or is plain wrong. Another good research habit is knowing about alternative research repositories in which to find records. Just because the courthouse doesn't have the older probate files, may not mean they are destroyed. Get in the habit of understanding other places records might be located in your ancestral areas.

9. Getting it into print

You probably figure that this means getting your family history published. That is a good goal, but not what it means here. Rather, as you research immediately get your notes, thoughts, abstracts, and citations into print. Use that computer. It doesn't matter if you are researching your own family or for a client – get the process, items consulted, and the results written down. Now. Immediately. Often while transcribing a document, some good ideas for further research occur to you.

10. Templates

Create some research templates in your word processing program. For example, do sample citations for books, microfilm, databases, deeds, probate, and others. Prepare a general bibliography by subject so that you can simply pull a citation for an oft-used reference book into your personal report. Put together the basic outline for the reporting you will do to yourself.

11. Your own “guidebook”

You may not want to write and distribute a guidebook on an ancestral locality – but why not create your own binder or computer file and call it your Connecticut, Illinois, Kentucky, New York, or Virginia guidebook? I have my own binders and files for several Midwestern states and they do a great job as a quick reference tool. Keep adding to it as you learn more. What might be some of the things to include in your personal guidebook?

- Obtaining vital records
- Which years of VR are indexed/online
- Content of each type of VR
- Addresses of repositories
- Parking info for repositories
- Hours of repositories
- Copy costs at these
- Newspaper index locations
- Special census indexes
- Newspaper libraries
- Military records
- Naturalization records
- Helpful books
- Helpful websites

12. Make use of timelines

Imagine sitting in a library reading some microfilm. The tables on which the microfilm readers sit have no space for laptop computers. Your computer is in another room across the hall (where it is protected by a cable lock) and you need to quickly check to see when Great Grandpa Samuel and his family left Kentucky or Illinois. Each time you need to check something like this you may not want to run across the hall (or maybe to another floor in the building). A timeline of family events and related history would be helpful. We will discuss timeline contents in the session. Don't forget that genealogy software programs have timeline capabilities and most have phone apps!

13. It may not be my ancestor

Think about that John Griffin you found. Is it really your ancestor? Be instinctively cautious of information found. Are you sure he is the only John Griffin in that area? Are you sure yours was still alive? Have you found several sources that agree, but there is still that nagging thought in your head that something is not right? Can you shoot holes in what others have deduced? Learn to react to ages at certain events, such as the age of the mother when she had a child. Do side-by-side comparisons of the details in a table or spreadsheet.

14. File folders are nice, but . . .

You are organized and have nicely labeled file folders. You have six of them in your tote bag to take to the library. It doesn't matter where you are researching, the successful habits are the same. You arrive, find a microfilm reader or computer, and open up one of your files. What are you going to do first? If you had developed the good habit of making a prioritized research list you wouldn't be wasting time wondering what to do! You likely make a shopping list for the grocery or discount store and hopefully by aisle, do the same for libraries, archives, courthouses, and even when sitting in front of your computer doing online research. Using Evernote or One Note might be a better choice than too many paper folders.

15. Flexibility

Even though seasoned and successful researchers limit the scope of research at any one time, they also know to have a back-up plan. If a visit to a library or courthouse doesn't pan out on the planned research, a genealogist shouldn't waste money plunked into the parking meter or give up that parking ramp spot. Come prepared with other tasks. Flexibility also means being open minded about research suggestions from others.



16. Maps lead the way

Keep maps handy in your at-home work space and/or bookmark links to the ancestral locations. Take along reduced size copies of maps when you go to the library or have quick links to the many maps that are online. This will save time when you are in the midst of analysis, research, and reporting for yourself. Some libraries do not have easily accessible maps.

17. Schedule research time

Procrastination is the middle name of many genealogists. One way to overcome this and accomplish something is to schedule review and research time. It may not be every week or every month, but if you don't make yourself do this, time slips away so quickly. Keep this appointment as you would any other appointment. Consider doing this away from your home.

18. Stumped?

Breakthroughs and obvious revelations do occur. It often happens when we put away the material for one ancestral family that seemingly presents a brick wall, and take it out six months later for review. Even leaving it overnight works well.

19. Be somewhat suspicious

Don't doubt everything that someone shares with you, but a successful habit is to verify data received from others whether it is in books, on paper, in oral form, or online. People can make mistakes, some don't know how to do real research, and others make assumptions. Keep only the correct relatives in your family tree by checking up on the "facts."

20. Give yourself time

Successful research takes time. A good habit means you don't try to do intensive work on your lunch hour or while you are cooking dinner. Don't expect to visit a courthouse and accomplish all your research tasks in an hour or two. Take time to review and rethink your research.

Now, will you aim for ^{good} Successful Research Habits?