

# Research Planning for the Win: Next Steps for Breaking Down a Brick Wall

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Diana Elder, AG  
Family Locket Genealogists



FamilyLocket.com  
Diana@FamilyLocket.com

Fruitful research begins with a plan. Harness the power of thought before action and make progress toward any research challenge.

## Start with an Objective

- All research starts with a question. Developing that question into a focused objective will allow you to save time and be more productive by staying on track throughout the research project.
- A research objective generally falls under one of the following categories.
  - Identify an individual.
  - Prove or discover a family relationship.
  - Discover ancestor actions or situations.
- First, analyze your pedigree and select a research question.
- Create a clear research objective from the research question.
  - Extensive brick wall questions may require several phases of research.
  - Each phase will have a specific objective.
- Include enough information in the objective to identify the research subject clearly from other individuals of the same name. Good key identifiers include:
  - Birth, marriage, and death dates and places
  - Known relationships such as a spouse or parents

## Timeline Analysis of Starting Point Information

- Analyze your sources – what do you already know?
- Make a timeline or chronology of the events of the ancestor's life.
- Create a timeline in a spreadsheet or table with birth, marriage, residence, the birth of children, death, and other life events pertinent to your research objective.

- Analyze each informational item to determine its validity. Not all sources are created equal!
  - Sources: Any material or person that contains genealogical information
    - **Original source** – the actual document or image of it created near or at the time of the event
    - **Derivative source** – indexed or abstracted information created from an original record
    - **Authored source** – a compilation of original and derivative sources
  - Information: The facts found in the source, classification depends on the informant.
    - **Primary** – first-hand knowledge
    - **Secondary** - second-hand knowledge
    - **Undetermined** – unknown informant
  - Evidence: what you pull from the source information to answer your research question.
    - **Direct evidence** clearly states the answer to a research question
    - **Indirect evidence** answers the research question when combined with other evidence
    - **Negative evidence** occurs in the absence of an expected situation

### Location Study

- Learn about the area your ancestor lived and the kind of records available
- Three questions to ask:
  - What happened?
  - Where did it happen?
  - Why did it happen?
- Create a simple locality guide with facts about researching in a particular location.
  - Background about the locality: maps, migration routes, history, etc.
  - Record collections: census, church court, probate, etc.
  - Include maps and links to websites with helpful information.
  - Learn about the jurisdictions of the locality – the records could be kept on the national, state, county, city/township, or church level.
  - Discover the parent county or county boundary changes.
  - Locate the neighboring counties since their repositories could also house records.
- Begin with the FamilySearch Research Wiki. [familysearch.org/wiki/en/Main\\_Page](https://www.familysearch.org/wiki/en/Main_Page)
  - Search by location or topic or click on the map

- Use the FamilySearch Catalog to see what records for the area might be available online or at the Family History Library. [familysearch.org/search/catalog](https://familysearch.org/search/catalog)
  - Enter the place name in the “place” search box, and do not include “county” or “city.”
  - Select the correct location from the choices and the availability: online, at a Family History Center, or any location.
- The Family History Guide links to major record collections for specific localities. [thefhguide.com/countries.html](https://thefhguide.com/countries.html)
  - Narrow by country > state or province

## Research Planning

- List the research objective.
- Summarize the known facts.
  - Create a table, bulleted list, or narrative from the timeline.
  - Choose the most pertinent information.
  - Review the starting point so you know where to go next.
  - Gather every clue from the documents.
- Create a working hypothesis.
  - A hypothesis is not a wild guess, an exact statement of fact, or the actual answer to the research question.
  - A hypothesis is an educated guess about what might have happened using clues from known facts such as the following:
    - Associates named in the documents.
    - Neighbors with the same surname.
    - Estimated vital facts, residences, and migrations.
  - Discuss what methodology you could use to test your hypothesis: studying the friends, associates, and neighbors (FAN club), a census study, land records, etc.
  - Note what you think the research might reveal.
  - See the tables from the FamilySearch Wiki for ideas of records to search for specific information.
    - [familysearch.org/wiki/en/Main\\_Page](https://familysearch.org/wiki/en/Main_Page)
    - Search for country + record finder
- Identify sources and methods for that location and time
  - Use the locality guide to brainstorm ideas.
  - Look for sources from the time and place covered in the research objective.
  - Link to specific record collections.

- Emphasize original records with primary information
- Consider boundary changes, migration routes, and paths.
- Consider economic, ethnic, genetic, governmental, historical, legal, religious, etc., factors that could affect the research.
- Consider all sources, including databases, finding aids, authored sources, abstracts, and family trees.
- Expand the focus to include the “FANs,” Friends and Family, Associates, and Neighbors of the research subject.
- Prioritize sources based on the information they contain and their ease of access.
  - Check online records first.
  - Consider the time required to search the record set or use the tool.
  - Start with the record most likely to answer the research question.
  - Plan searches in specific databases.
  - Consider the starting point information.
  - Focus on the next logical steps.
  - Keep the prioritized strategy brief – about five sources or less.
  - Be flexible in the research and allow what you find to guide the next steps.
  - Choose the next steps for the research from the identified sources list.

### Research Planning Tips

- The goal is to get closer to the solution – this project is just ONE phase.
- Put any parts of the research plan not covered in this phase into the future research suggestions of the report.
- Study journal articles to see what sources other genealogists use in their research for a similar locality and time.
- Don’t over-plan knowing that the research may take you in a different direction.

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