

Planning a Genealogical Research Trip

Presented to the Rock County Genealogical Society by David Bradford (d_w_brad4d@yahoo.com), Feb. 2007

FOCUS ON PRIORITIES & TIME MANAGEMENT – The records you want determine where you go. Write down names, records and timeframes you want. Use this as your constant roadmap; minimize distraction:

Research Visit - Roadmap for Genealogy Visit

Research Objectives:

- Photograph tombstones of Frederick H. Waite family (died c. 1920)
- Identify parents of Fred D. Lasher in Milton (born c. 1860)
- Copy marriage certificate of Alice Waite and Frank I. Bradford (married 30 June 1930)
- Copy death certificate of Fred D. Lasher (died Aug. 1942)
- Copy probate records of George and Helen Lasher-Bradford (died 1987 & 1989)

Surname List:

- BRADFORD (Alice M., Caroline, Frank, George H., Ira A., Willard I.)
- LASHER (Agnes, Fred D., Helen, Donald, Zelda)
- WAITE (Alice M., Frederick H., George B., Samuel, William F.)

List married women twice - both under their maiden and married names.

ALWAYS USE AN INDEX – indexes are summarized lists of original vital records, newspapers, cemetery, probate and other records. Indexes are generally alphabetized by surname with information about exactly where to look for the original record; *INDEXES FIND NEEDLES IN HAYSTACKS* by quickly pinpointing an ancestor among thousands of records. *DON'T WASTE TIME SEARCHING WITHOUT AN INDEX*. Check repositories' web sites for online or on-site indexes; buy indexes from genealogical societies' websites. Use any indexes to "pre-fill" the Record Extraction Forms you will bring to your visit (see last page for a sample Record Extraction Form).

RESEARCH ONLINE FIRST – Arrive at the Library, Archive, Court House or Cemetery with an efficient research plan already in hand. Otherwise, your limited time is wasted:

- Public Libraries at www.publiclibraries.com
- County Court Houses at www.zanatec.com
- Federal Land Records at www.gloreCORDS.blm.gov
- Genealogical Societies at www.familyhistory.com/societyhall/search.asp
- Historical Societies at www.daddezio.com/society
- State Archives at www.statearchivists.org/states.htm
- State Vital Records at www.daddezio.com/records/room/index.html
- Christian Churches at <http://churchangel.com/welcome.htm>
- Religious & Denominational Records at <http://www.cyndislist.com/religion.htm>
- Cemetery Location at www.daddezio.com/cemetery
- Directory of Funeral Directors at <http://www.funeral-dir.com/default.htm>
- Grave Locations at www.interment.net or www.findagrave.com
- RootsWeb Message Boards at <http://boards.rootsweb.com/localities.northam.usa.states/mb.ashx>
- USGenWeb's State & County Sites at <http://www.usgenweb.com/>
- American Local History Network at <http://www.usgennet.org/search/>
- Mormon Church (LDS's) nearest Family History Center can be found at www.familysearch.org/Eng/Library/FHC/frameset_fhc.asp?PAGE=library_fhc_find.asp

WHEN TO VISIT – Know any seasonal hours of repositories. Spring & fall are better for cemetery walks. – The weather is better and the corn isn't hiding small private cemeteries. Attend local genealogical society meeting(s) and ask to have your visit and surnames announced.

WHAT TO PACK – For Record Repositories dress professionally, flat shoes, brief case or backpack (you may be asked to “locker” it), business cards, a clipboard, your “Road Map”, blank records extraction forms, several pencils (no pens), mini-stapler, cash (photocopies & parking), magnifier, “yellow stickies”. Smaller repositories appreciate cookies or doughnuts – and friendly genealogical researchers.

WHAT TO PACK – For Cemetery Walks bring gloves, sunglasses, bug spray, rubber bands (to keep creepy crawlers out of pant & shirt cuffs), cookie sheet (to reflect sun on shaded tombstones), ball cap, overshoes, kneeling pad, clipboard, record extraction forms, pens, pencils, chalk (to highlight inscriptions), nylon soft-bristle brush & plastic scraper (for cleaning-up algae-covered stones), spray water bottle (no detergents) and paper towel, grass clippers, whisk-broom, masking (not duct) tape, fabric interfacing, large crayons or charcoal (for tombstone rubbings), hand wipes, digital camera & empty memory card or 35 mm camera & extra film, pocket audio tape recorder & extra batteries and graph paper for mapping the cemetery. Bring a cell phone, but don't expect cell service; use a GPS to locate cemetery and record latitude and longitude, park with your car visible from the street and let someone know where you're going. Bring Tylenol, Excedrin or Advil for muscle and headaches. I use a 5 gallon bucket with a multi-pocket canvas insert for all these items.

WHERE TO VISIT – Know where records are located; each type of record is in a different location. It is crucial to browse online or call ahead to see if records still exist (or have been lost to fire a century ago), are stored locally (or have been shipped-off to the State Archives 500 miles away) and are accessible (or are stacked, un-indexed in unsorted boxes in a museum warehouse). Ask if a librarian, researcher or genealogist specializes in your record type or surnames; schedule accordingly.

Church records Identify an ancestor's denomination with biographies, obituaries, family bibles, memorial cards and church record indexes. Call or email local churches & regional HQs to ask about records. Often baptism and marriage records are indexed; Googling a location and pastor's name (from a newspaper marriage or obituary notice) can identify a church/denomination.

Cemetery Records Aim for time-efficiency; find an ancestor's exact burial plot in advance.

Almost NEVER SEARCH A CEMETERY WITHOUT A KNOWN PLOT LOCATION but if you must, look at the section where there are similar death dates because cemeteries are often expanded as previous areas fill capacity. Walking a medium to large cemetery without a map and known grave location can be an exercise in futility and rob you of precious time for other research; instead check for:

- a cemetery, obituary or biographical index – browse, buy or borrow by interlibrary loan – all online. See the State Vital Records, USGenWeb, Genealogical and Historical Society and American Local History web site addresses above.
- a funeral director – smaller towns have few and their records are often archived and comprehensive. See the Funeral Director directory web site above.
- a cemetery caretaker or sexton – local funeral directors know their contact information. See the Funeral Director directory web site above.

Directories, Biographies, Published Genealogies & Local Histories list names, occupations, political affiliation, residences, acreage, religious denomination and society memberships. Check your visit area's:

- Public Libraries – browse catalogs online; print call numbers; check-out interlibrary loan locally. (A local library may allow you to request book or copies of specific pages from remote repositories)

- State & local Historical/Genealogical Societies - browse catalogs online; print promising resources. (Check your local library's inter-library loan ability; otherwise add the book to your visit objectives).
- The Family History Library at http://www.familysearch.org/Eng/Library/FHLC/frameset_fhlc.asp. Items can be shipped to your local LDS Family History Centers to review before your trip. This is an under-used resource – many vital records (including some for which originals no longer exist) can be viewed from LDS microfilm at the LDS Family History Center nearest your home. To find one nearby: http://www.familysearch.org/Eng/Library/FHC/frameset_fhc.asp?PAGE=library_fhc_find.asp.
- Wisconsin State Historical Society catalogs at <http://madcat.library.wisc.edu/index.html> and <http://arcat.library.wisc.edu/> have collections for many states – especially Midwest & New England.
- For Research in Wisconsin, use the online genealogy resources of the State Historical Society available at its main page: www.wisconsinhistory.org/genealogy/
 - Search the 150,000 person Wisconsin Names Index: www.wisconsinhistory.org/wni/
 - Search the 2.5 million item Vital Records Index: www.wisconsinhistory.org/vitalrecords/
 - Search thousands of Wisconsin Historical Images: www.wisconsinhistory.org/whi/
 - Search 16,000 Local Histories & Biographies: www.wisconsinhistory.org/wlha/

Deeds and Land Records are found in the County Register of Deeds (or to where they have sent them for off-site storage). These are among the most difficult to find without an index. Many early settlers' (original) land grants and original land purchases are online at the BLM (US Government Bureau of Land Management) site. Later arrivals may be found in atlas and plat maps at local libraries, societies or sometimes online. You will want to use an index if available. (See the related web sites listed above).

Newspaper Obituaries or Other Events are often available. Pre-record microfilm roll, date, page and column on Records Extraction Forms as a plan of attack in advance of your visit.

- For a fee at online subscription websites: www.Ancestry.com and www.newspaperarchive.com.
- Free on microfilm at local libraries, state/local historical societies or an LDS Family History Center. Many Libraries have microfilm indexes, film viewers with photocopy features. Call or browse ahead.
- Newspaper indexes on web sites and in Society publications which make microfilm viewing easy. Call or browse the local genealogical societies' web sites for a list of publications or look-up services.

Probate Records are usually held at the County Court House by the Clerk of Courts; older probate records may pass to a local, state or even regional historical or genealogical society or even private title & abstract companies. Call ahead to the court house, and local genealogical society about location, indexes, rules for access, hours of availability and cost of copying.

Court House Holdings – Here you will find most birth, marriage, death, probate, land and tax information. Unless county offices have an on-site index (most do; call ahead to ask), you will need to arrive with names and dates from vital records indexes or newspaper articles sometimes filing dates of vital records are weeks before or weeks after an event **BEWARE THE SEMI-CHRONOLOGICAL COUNTY LOG BOOKS** and also **BEWARE THE SEMI-ALPHABETICAL COUNTY RECORDS BOOKS**. For a fee, the Register of Deeds will provide copies of the birth, marriage or death certificates. Clerk of Courts manages probate. Browse and if needed, call ahead to the court house and introduce yourself; check hours, indexes, visit procedures, records availability and copy costs. Remember – your ancestor's nearest county seat may have been in an adjoining county or even another state. If you come-up empty online (or on-site), then widen your search. Do your research online in advance in case you need to go there (Driving Maps, Addresses, Availability, Accessibility, Costs & Restrictions). Recent changes in Homeland Security and fears about identity theft may require you to present a photo ID, sign a written statement that you are researching only direct relatives and restrict you from looking at certain kinds of records. **RULES VARY.**

MAKE FRIENDS - Amazing research strides can be made when you make a connection to someone in the area of your visit who shares your surnames; ask about bibles, photos, heirlooms and homesteads:

- Email or call local genealogical societies to see if they know someone researching your lines locally,
- Search local societies, RootsWeb's county message boards and US GenWeb's county web pages for your surnames. Email others with a shared interest to discuss your surnames and your visit. Note: RootsWeb is organized by **locale** down to County level and **surname**. **Search both and search adjoining counties and surname variations**. Posting a new message to the county genealogical message board about your visit; ask for advice and for anyone with shared interests (surnames or record types). Ask about eccentricities at the local County Register of Deeds or Courts.
- Local Funeral Homes keep records of their local burials and know cemetery caretakers (sextons). Even merged or long-gone funeral homes may have transferred their records to a surviving funeral business. Sextons almost universally welcome inquiries from ancestors of their "residents".
- If you know the cemetery's name, call the sexton & ask for surname records and a burial plot map. Offer to send copying fees and a self-addressed, stamped envelope if email is not available. However, **DO NOT EXPECT A CARETAKER TO BE YOUR PERSONAL CEMETERY GUIDE**.
- A Researcher Surname List (RSL) is found at <http://rsl.rootsweb.com/#search>. Contact others who share your surname and geography; add your surnames and contact information to RSL. These are active genealogists. If they aren't from your branch, ask if they know of someone else who might be researching your family. Search Google for your ancestor's family association using these search terms: *<your ancestors surname> family association*. For example: **tallman family association**. There are also now Surname DNA Studies and Projects. There is no single directory, so Google these terms *<your surname> DNA project OR study*. For example: **young dna project OR study**. Develop any connections as you would for the Researcher Surname List (RSL).
- Find & phone a surname cousin using www.WhitePages.com. Don't be pushy; see where it goes. Compare notes and get referrals to older cousins and those involved in family history research. One feature in the first page of results allows you to widen the search beyond the target city and cover the surrounding area. "Cold calls" to cousins are not for the faint of heart; have well rehearsed opening lines and deliver them earnestly: for example, *"Hello, my name is Sarah Williams and I think we might be related. My great grandfather Erasmus P. Quigley lived in Braunsweiger, Wisconsin and I am trying to locate relatives who still live in the area. I wonder if you recall this name or know someone who would."* Once you make contact, offer to share your photos and research before asking about their photos, letters, heirlooms & family bibles. Ask about family members who are into genealogy. If all goes well, ask them to join you for lunch at a public location during your visit.

DO BRING YOUR WHOLE (DECEASED) FAMILY – Bring existing family research either as:

You WILL bump into surnames you recognize but didn't include in your objectives or Road Map. Knowing **quickly** whether they were your grandfather's first wife (important enough to add to objectives) or your 3rd cousin twice removed (not important enough to use-up precious visit time), is crucial. Keep your whole family tree close at hand.

- A 3-ring binder of hand-written Pedigree Charts and Family Group Sheets works just fine, or
- PC-based genealogy programs like Family Tree Maker or Roots Magic give you several options:
 - ✓ Print and carry Pedigree Charts and Family Group Sheets for main lines,
 - ✓ Tote a portable laptop PC to allow review and update of ancestors' information, Laptops are great for carrying large amounts of information to your destination, and for helping you assemble and analyze new pieces of information, **BUT** your laptop can be a big problem. Many repositories will not allow laptops in records areas. This leaves your PC vulnerable to theft while you are in the library stack, court house copy center or Society basement archive. Lock your PC in your trunk – not your hotel room.

- ✓ Transfer your family files to a personal digital assistant (PDA) or a newer digital phone: GedStar software at www.ghcssoftware.com/gedstar.htm is for the Palm Pilot devices; Pocket Genealogist www.northernhillssoftware.com is for Windows-based devices. I have 4,000 relatives on my cell phone, but only about 50 can answer my calls anymore.

DON'T BRING YOUR WHOLE (LIVING) FAMILY – Unless your spouse and children are also genealogically obsessed, your family will neither understand nor tolerate the rigors of a research visit. Court house staffs will also fail to appreciate the charm of a cranky 5 year old (or 55 year old husband). If family must come plan other local activities for them by checking local tourism boards and state departments of tourism. If you're shoehorning genealogy research into a family vacation – rather than the reverse – then efficiency, pre-planning and browsing the repositories in advance of the visit are crucial to maximizing research results from the few hours your family is tolerating your absence.

SCHEDULE YOUR DAYS & AND NIGHTS – Check the hours of operation of each of your records repositories and schedule your stops to make best use of your time. Smaller repositories often close seasonally or are open only for scheduled appointments. Public libraries are typically open later than court houses, so start with the courthouse and end with the libraries. Each night in your motel room, assemble, annotate and reconcile your daily research results, then review the next day's campaign.

GOOGLE MAP YOUR ROUTES – Use Google Map (www.maps.google.com). From here you can plan your stops, plot your routes and find hotel and restaurant accommodations. The US Geographic Service (USGS) website (<http://geonames.usgs.gov/pls/gnispublic/>) allows detailed searches for specific geographic and political features (e.g., churches, schools, cemeteries).

CAPTURE, RECORD & RETAIN – These recommendations that will make your findings more useful once you get home and try to make sense of 25 pages of scrawled notes:

- Use extraction forms available at www.ancestry.com/trees/charts/ancchart.aspx (or see next page)
- Copy **all** the given names, dates and volume/page references for your surnames in **every** index, – even if you don't recognize the names, you will later find that some of these are family members.
- When you take notes, start with a fresh sheet for each record type and each record repository,
- When possible, photocopy rather than transcribe names from an index. A digital camera does a credible job as a poor man's mobile photocopier; make sure the repository allows photos. Turn off the flash, lengthen the shutter speed (longer exposure in dim light) and use the timer feature and a table top mini-tripod to eliminate blurry pictures from the photographers' coffee jitters.
- Time won't allow review of every original record for your surnames, so narrow focus using road map; retrieve and view the only most promising original records & buy copies of only the most important.
- Whenever you photocopy a page from a book, also copy the book's title page noting the repository and the library call number; then staple the pages together.
- Your newspaper articles are seldom near the masthead, so handwrite the newspaper name, city, volume, date, page & column number, repository (library name & address) and microfilm number. It is sometimes interesting to include a photocopy of the newspaper's masthead and that day's headlines as a picture into events in your ancestors' life and times.
- Neighboring farmers' surnames on atlas and plat maps may later be discovered to be relatives. Copy the plat map section or township if allowed. Check Society websites and publication lists for indexes.
- Map, record **and** photograph all tombstones near ancestors' plots; some are likely extended family. Email photos and notes home in case your equipment is stolen, breaks or is inadvertently erased.
- Always note sources and record misspellings and sound-alike name variations as shown in records.
- Waite to draw conclusions – make notes in extraction forms about your suspicions and new theories.

