A Guide to Starting Your Genealogical Research

- Tracing Your Family Tree -

by Brian W. Hutchison, B.Comm.
CMA, FSA Scot*

Introduction

*G*enealogy vs. Family History: Genealogy is a collection of relating names, dates and places and provides the framework for a Family History compilation. A Family History contains not only a genealogical collection but a textual story and history of individuals and the events that shaped their lives. The profession of genealogy recognizes equally the different audiences these two directions reach.
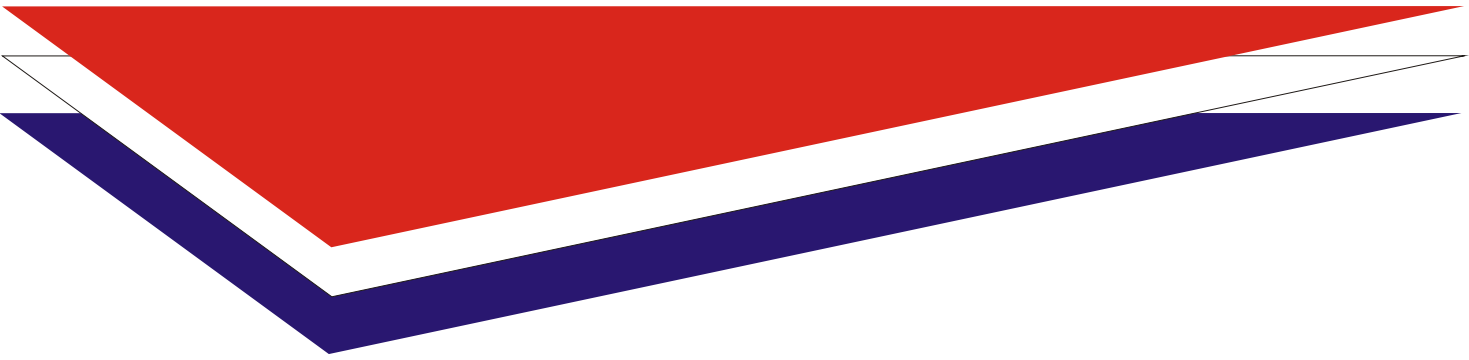
Probably, no other topic in genealogy is more important than knowing how to "trace your family tree" effectively. The quality and quantity of your performance here will determine your success or failure in your genealogical work! Your knowledge on the basics will be the podium upon which your project will succeed or fall into a maze of frustration & discouragement.

Remember, it is a genealogical axiom that *only organized genealogists succeed*. Inexperience or a poor memory is not the main cause or failure; it is the lack of a good note-keeping system and organized research strategies.

DEVELOPING A RESEARCH PLAN

It is virtually impossible to remember all details of a research problem after not having worked with it for awhile, let alone the many other research problems you will encounter in the course of your genealogical experiences. Keeping no or poor research records is equivalent to making no searches at all, because you will undoubtedly forget what you have done and what you found or did not find.

Beginning genealogists, in particular, may overlook logical sources and spend too much tome on illogical ones until they are more experienced, but as long as they take good notes and file them well, their experience will always work to their good, and searches will seldom need to be repeated.

A good genealogical research game plan, note-taking and note-keeping system will enable the researcher to easily answer four strategic questions:

A). What is our intended scope of the project and our short & long-term objectives of our genealogical research plans?
B). What information do we know and what genealogical records sources have already been used to discover information on the person, family, or surname in question?
C). What exact information was discovered?
D). Can the information be found again quickly by using the references for it?

Once these questions have been answered the more tactical or detail questions of operation can be asked. Namely:
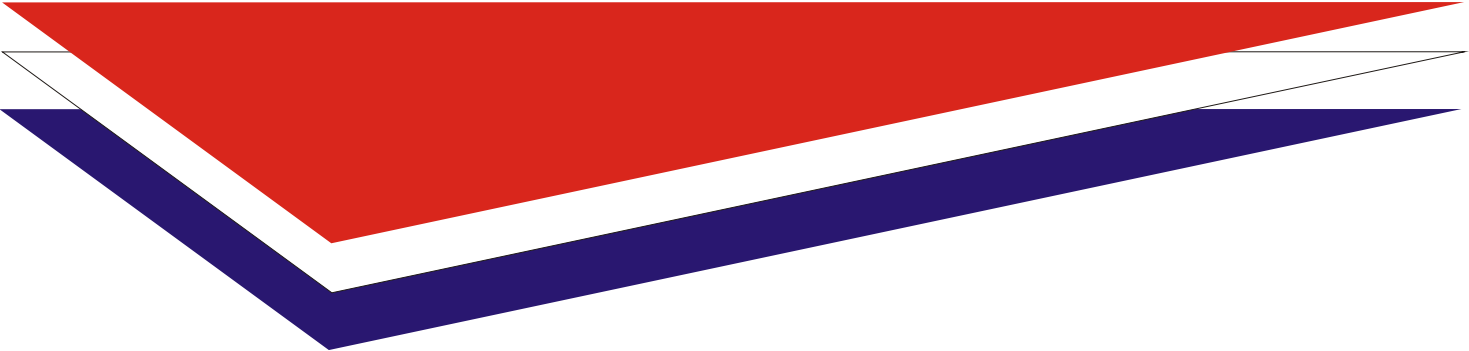
A). What is it (exactly) I want to accomplish and in what time period?
B). What letter-writing technique should I use in my correspondence?
C). What sort of log should I use to document my sources and finds in?
D). What sort of log should I use to document persons and institutions contacted?
E). What specific resources & institutions are available in pursuing answers to problems?
F). What detail record-keeping system should be used?

WHAT IS IT THAT GENEALOGISTS ARE TRYING TO ACCOMPLISH?

It is important to define what it is that genealogists are tyring to accomplish. Not so much in data content but in their technique, for it is the technique that will define the success or failure of their other genealogical objectives. It is the technique that will make your research, effective, efficient, and economical. All the data in the world cannot be brought out to particular & specific information if you do not know how and where to look for it.

You may think it obvious of the goals but many beginning genealogists enter the activity without a full understanding of what is required for effective & efficient research, both in terms of data extraction and technique. If you seem to be spending more time searching than extracting information, possibly you have not yet uncovered the goals and/or principles for effective genealogical research.
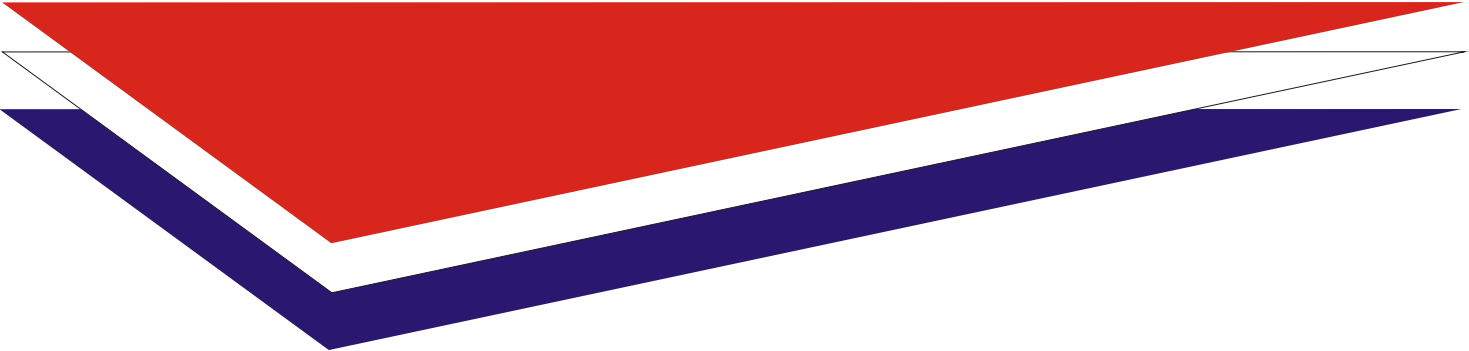
The researcher needs to isolate specifically what he or she wants to accomplish, not only in terms of overall goals of the project but also for each search undertaking he or she does. Therefore, let me state a couple of prime goals simply and generally:

A).   As a Researcher, you want to locate information on subjects (family members or otherwise) for the purpose of trailing bloodlines, both ancestry and descendancy. In addition, you want to use the whole family research approach for effective resource evaluation & data extraction;

B).   You want to continue throughout the entire project to evaluate evidence found on your search & extractions, both in terms of the proving or disproving pedigree relationships;

C).   You want to document your search results (both positive & negative) according to the standards for proper genealogical documentation for the benefit of yourself & others. Refer to Elizabeth Shown Mills publication titled *"Evidence! Citation & Analysis for the Family Historian"* for documentation standards in this field.

D).   Lastly, you need to be ready & willing to evaluate all types of documents & archives for effective management of your research phase of the project.

UNDERSTANDING THE PRINCIPLES FOR EFFECTIVE SEARCH TECHNIQUES

Let me isolate the principles for making search results effective, efficient, & economical. Your project can easily become unmanageable & without directions if one does not have goals and applied techniques available:

A).   Firstly, as a researcher you need to be able to analyse your information, define what you have and what detail information you want from your searches;

B).   Secondly, the researcher needs to know how this new found information (if found) will enhance their documentation & further search operations. If it is information that does not enhance further work you will need to decide on just how much effort & expenses you want to place on it;

C).   Thirdly, one needs to be familiar with the different types of documents that are available that may prove helpful in your extractions. Subsequently, familiar not only with the various document types but also development of an increasing knowledge throughout the project of the specific documents, themselves, that are available to you as a researcher for your area of interest;

D).   Fourthly, the researcher needs to disseminate in some sort of hierarchal manner, your choices for the document types you will search for;

E).   Fifthly, you need to ascertain what repositories exist that may contain the documents you are interested in obtaining information from;

F).   Sixth, one needs to determine the best method for extracting those documents and getting them in-hand. Do you ask the repository to undertake the search &

extraction for you? Do you seek interlibrary loan alternatives? Do you hire a professional genealogist to ferret out the resource material for you?

G).   Lastly, as a researcher you need to maintain an ongoing record of the types of documents being held by institutions you use and those that may be of interest in your search. In addition, keep a record of your correspondence, the results of that correspondence and even more importantly, a detail source record of your extractions according to standard source referencing techniques. Keep in mind that you may be required to re-extract this document or other similar documents again during your research phase.

MATCHING GOALS WITH POTENTIAL RESOURCES WITH AVAILABLE REPOSITORIES

So, really the key to effective genealogical research, regardless of whether it is long-distance or otherwise, is the ability to match your goals with potential resources to available repositories.

One needs to carefully consider what it is he or she is trying to accomplish (at a detail level), then ascertain the various sources that are liable to provide you with the information you are seeking, prioritizing the sources to be searched in conclusion. Prioritizing your search because some documents, such as prime records, may provide better information than other documents.

At this point, the researcher with both these factors in mind must consider what institutions may hold those documents and how you will be able to acquire the items you desire.
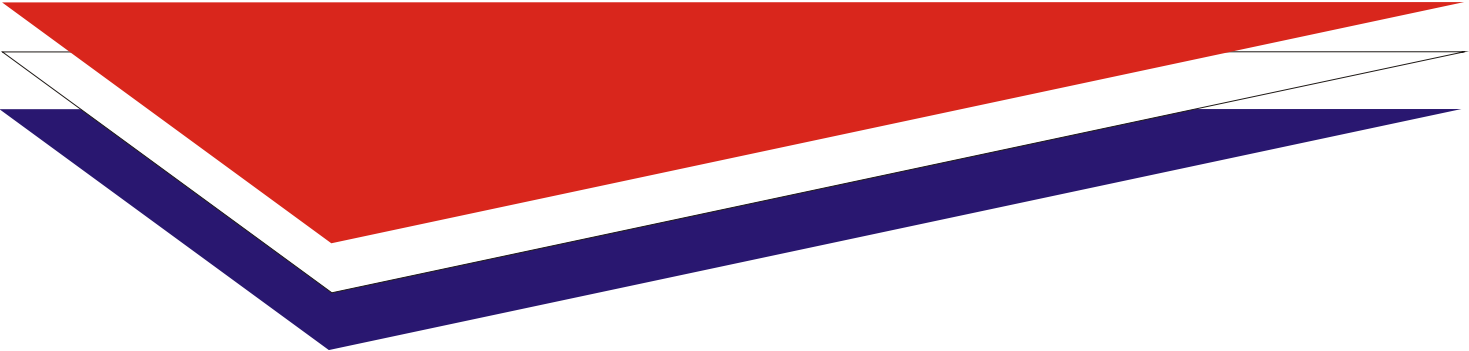
Establishing this routine will provide effective management of your skills and your time with overall benefit in a more comprehensive search and final results.

BASIC RULES FOR UNDERTAKING GENEALOGICAL RESEARCH

Some guidelines to research by:

- *Work from the Known to the Unknown*. Begin with yourself and then work back in time through your ancestors.

- *Start with your 'home-search'.* Glean whatever information you can from old documents, letters, family bibles/journals, visits with family members (especially elderly ones), old wedding invitations, birth or death announcements, church or local history books, yearbooks, etc.
- *Refer to women by their maiden surname.* This allows you to better document and refer to family members as well as easily follow their connections through the lineages.
- *Evaluate all data for reliability.* Refer to Section entitled 'Categorization of Data'. Concentrate on extracting as many primary and secondary class records as possible in establishing the reliability of your search results.
- *Do NOT get 'hung-up' with spellings of names.* Make a collection of all possible ways of spelling the names you are searching. It is not unusual to find a person's name spelled one way on a birth certificate then other ways on he marriage, death or other documents. Spellings frequently changed when people emigrated, especially if the alphabet of the new country differed from where they had come from. Often forms were filled in by clerks who spelled by phonetics, then were signed with an 'X' by the person referred to on the form/document (e.g. Marriage certificates, wills, etc.).
- *Recognize naming patterns and family traditions.* Many countries use or have used naming systems (surname and/or given names) unique to their own area.
- *Estimate dates of events, where necessary.* If you don't have an exact date, estimate it as closely as you can then indicate how you came to that conclusion. Generally it can be thought that a women married at the age of about 22 years while a man at 24 years. When you get farther back in your research, you will find that there is a change in the calendar system from Julian to Gregorian. As this occurred at different times depending on the country, you will have to familiarize yourself with the history of the country you are searching in however the change generally occurred sometime before 1800.
- *You MUST have a location associated to an individual and an event.* You will find references to 'where' your relative lived in many places, letters, journals, documents, newspapers, etc. Gazetteers can help you locate where unfamiliar places are. Make a habit of keeping a large-scaled map of the areas you are searching, with your research papers. Noting three geographical areas will help you to 'zero-in' on the location. You need: a country; a subdivision of that country (i.e., province, county, state, etc.); and then a smaller judicial area within that subdivision (i.e., city, town, parish). You will find that the term 'parish' is used also for an ecclesiastical district as well as a 'church'.
- *Keep records that other people can understand and follow.* You are putting a lot of time, effort and money into this project so don't waste it by having records that are confusing. Should you discontinue your effort in this work, your documentation should be well enough organized that anyone could take over from where you left

off. By doing this, however, there is also a spin-off benefit for you as one of the key criteria for a successful project is the level of organization and record- keeping one does. The relationship is directly proportional.

- *Cite your sources of information.* If you need to go back over your work you will want to know where you got your information from and be well aware that who ever reads your final product will question what specifics you have included there, relentlessly, unless you can substantiate you claims!!
- *Write letters and more letters!!* The key to obtaining information is to go after it and unless you can research it for yourself locally or by visitation, the only other alternative is to write someone else. Probably the majority of your final information will come from this source. Letters should always be clear, concise, correct, courteous, and clean. Keep a carbon copy if you do not have a copy saved on your word processor or computer. Generally enclose a SASE (Self Addressed Stamped Envelope) when asking people to reply to a letter of yours. However, for major institutions, it is recommended you do not do this. Enclose some means of paying for return postage if you do not have an appropriate stamp (e.g., International postal coupon or money order). Do NOT request too much in any letter. The recipient may be overwhelmed or annoyed then will set your letter aside. Avoid being demanding! Offer to exchange information with other researchers.

BASIC STEPS FOR STARTING AND PROGRESSING WITH YOUR RESEARCH

The basic steps for undertaking your genealogical research are very simple and straight-forward. However, they all must be undertaken and in the sequence I shall state here. Not only that but you need to be effective in the steps you do undertake and that will be reflective in your technique that I have already discussed.

Therefore, the steps really incorporate the six following elements:

A). Using your developed search techniques to locate your subjects of interest;
B). Interpreting your source material;
C). Verifying and interpreting the facts of your source material;
D). Judging the reliability of your evidence;
E). Deciding whether to accept or reject the evidence; and
F). Documenting your findings.

You, as a researcher, can only effectively accomplish your genealogical goals if you understand these principle steps, the technique for search and then follow them through strictly and in the order stated.

COMPILING YOUR BASIC INFORMATION

You will find that it helps to have a good understanding of your genealogy, no matter how little or how much information you may have. Compile the information you have worked so hard to gather into the basic components before putting it into a computer or a formal working document.

Develop or use one of the many style of forms and charts available to you to compile your data. This will not only allow you to take a visual inventory of what information you have and do not have as well as give you an abstract for easy reference when doing your research.

Ancestry Chart	Sometimes known as a 'pedigree chart' or 'birth brief. This is a 'map' of your direct lines (i.e., Parents, grandparents, great-grandparents, etc.).
Family Group Sheets	Forms used to enter data of your collateral lines (ie., brothers, sisters, aunts, uncles, cousins, etc.). It helps to number or code these sheets to your ancestry chart. There are several standard numbering conventions available for you to follow. Refer to the National Genealogical Society (US) 1992 publication by Joan Ferris Curran, "*Numbering Your Genealogy: Sound and Simple Systems*" for reference on these acceptable standards. Try not reinventing the wheel by creating something of your own inspiration! These methods identified in Ms. Curran's publication are sound systems understood by most genealogists.

CHECKLIST OF POTENTIAL RESOURCE MATERIAL FOR ACCESS

This checklist is a guide to the records you should find in the homes of yourself, your relatives, local or distant repositories, and even elsewhere for the purposes of extending your research. It is in no way an exhaustive checklist. Some sources may be more relevant than others for your particular search and subject but they all should be considered. Circle the point beside each kind of record you have searched. Have you searched them all?

PERSONAL RECORDS

● Journal

- Diary
- Biography
- Letters
- Photographs
- Autograph Album
- Baby Book
- Wedding Book
- Scrapbook
- Funeral Guest Book
- Guest Register
- Travel Diary
- Book Plates
- Hobbies

CERTIFICATES

- Birth
- Marriage Bonds & Applications
- Marriage
- Marriage Licenses & Contracts
- Death
- Divorce & Annulment
- Adoption
- Graduation
- Christening/Baptism
- Blessing
- Confirmation
- Ministerial
- Membership
- Apprenticeship
- Mission Release
- Achievements
- Awards

FAMILY RECORDS

- Bible
- Pedigrees
- Family Group Sheets
- Genealogies
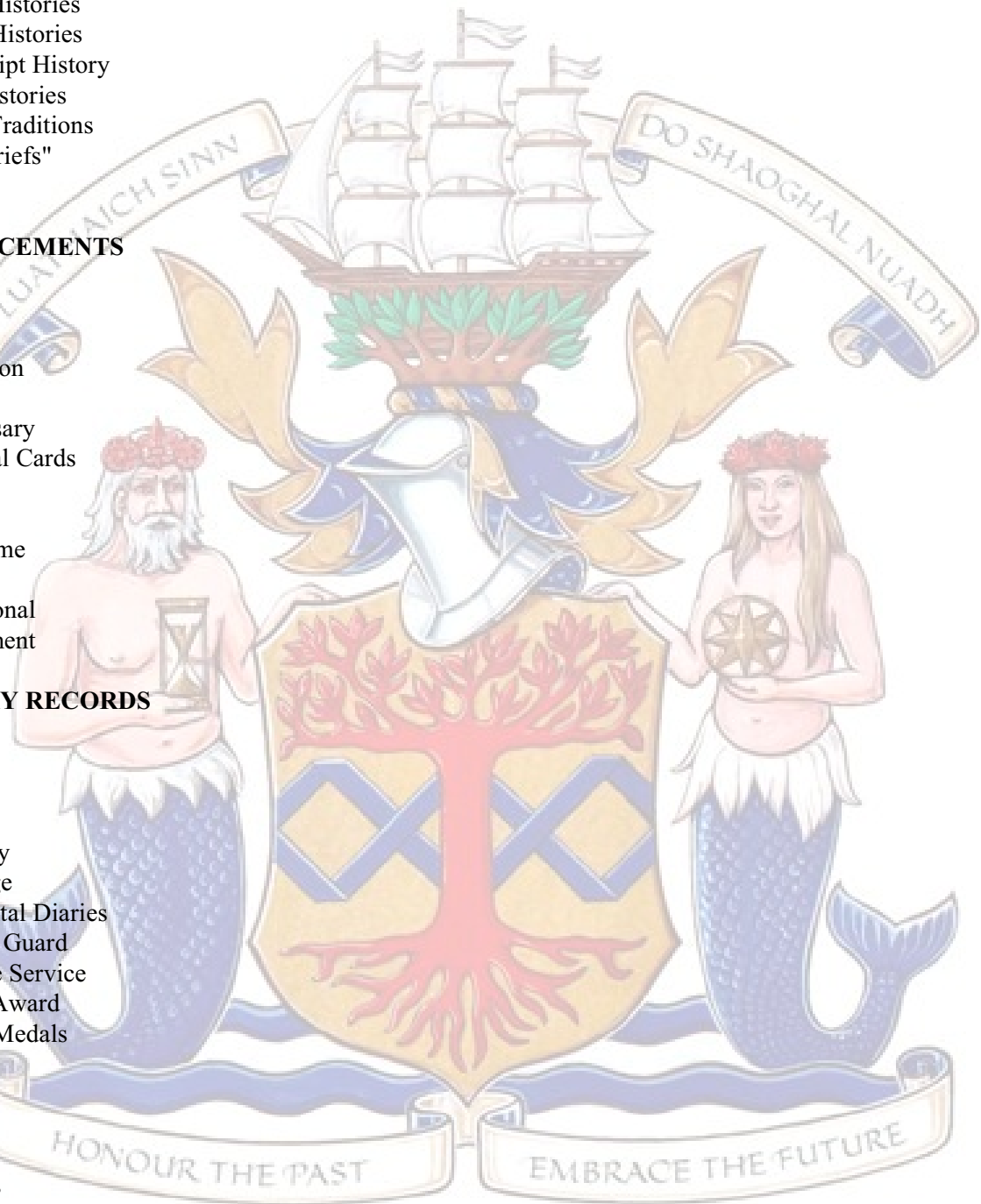- Books of Remembrance

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- Family Bulletins
- Family Histories
- Printed Histories
- Manuscript History
- Local Histories
- Family Traditions
- "Birth Briefs"
- Hobbies

ANNOUNCEMENTS

- Death
- Funeral
- Graduation
- Divorce
- Anniversary
- Memorial Cards
- New Job
- Travel
- New Home
- Birthday
- Professional
- Engagement

MILITARY RECORDS

- Service
- Muster
- Pension
- Disability
- Discharge
- Regimental Diaries
- National Guard
- Selective Service
- Bounty Award
- Service Medals
- Ribbons
- Sword
- Firearms
- Uniform
- Citations

- Separation Papers
- War Roster/Memorials
- Award/Honour Lists

MEMBERSHIPS

- Cards
- Publications
- Programs
- Uniforms
- Awards
- Society/Club Records
- Church

SCHOOL RECORDS

- Diplomas
- Honor Roll
- Awards
- Transcripts
- Yearbooks
- Publications
- Alumni Lists
- Frats/Sororities

CHURCH RECORDS

- Birth
- Christening/Baptism
- Confirmations
- Blessing
- Ordination
- Marriage & Marriage Banns
- Divorce & Annulment
- Death
- Burial
- Circumcision
- Admissions
- Removals
- Disciplinary Proceedings
- Subscriptions Lists

- Membership Lists
- Ministers's Records
- Meeting Minutes
- Sunday School Lists

MORTUARY, CEMETERY & BURIAL RECORDS

- Burial Records from Cemetery Offices
- Sexton Records
- Funeral Home Records
- Monumental Inscriptions
- Plats
- Deeds
- Perpetual Care Records
- Burial Funds
- Death Gifts and Memorials
- Funeral Cards and Books

LEGAL PAPERS

- Land Grants
  - Wills
  - Water Rights
  - Abstracts of Title
  - Heir & Devisee Commission
  - Grantee/Grantor Indexes
  - Deeds
  - Mortgages
  - Surveys
  - Land Petitions
  - Patents and Grants
  - Leases
- Wills/Probate
  - Indexes
  - Wills
  - Administrations
  - Inventories
  - Bonds
  - Settlements
  - Packets
  - Guardianship/Adoption

- ○ Estate Files
- ○ Copybooks
- ○ Inheritance Tax
- Loans
- Contracts
- Court & Government Records
  - ○ Dockets
  - ○ Minutes
  - ○ Orders & Decrees
  - ○ Judges Bench Books
  - ○ Quarter Session Court Judgements
  - ○ Case Files
  - ○ Indexes
  - ○ Registers
  - ○ Chancery Court Records
- Court Related Records
  - ○ Summons
  - ○ Subpoenas
  - ○ Sheriff Records
  - ○ Police Records
  - ○ Jail Records
  - ○ Jury Records
  - ○ Lawyers' Briefs
  - ○ Justice of Peace Returns
- Municipal Records
- Taxation Records
  - ○ Poll Taxes
  - ○ Tax Notices
  - ○ Personal Property
  - ○ Assessment/Collectors' Rolls
  - ○ Real Estate
  - ○ School
  - ○ Poor Rate
  - ○ Tax Exemption Status
  - ○ Various Other Taxation Records, specific to locality & time period

INSTITUTIONAL RECORDS

- Insurance Reports, Policies, Claims
- Hospital Records
- Medical Records

- Immunizations
- Charities
- Physicians & Midwives
- Convents
- Seminaries
- Libraries
- Schools, Colleges, Universities
- Other Educational Institutions (e.g.. Ladies Finishing School)
- Historical Societies
- Genealogical Societies
- Mission Societies
- Orphan Societies
- Reunion Societies
- Amateur Sport Organizations
- Veterans Organizations & Societies

LICENSES

- Business
- Occupation
- Professional
- Hunting
- Firearms
- Drivers
- Motor Vehicle Registration

IMMIGRATION AND SETTLEMENT

- Passenger Lists
- Naturalization
- Denization
- Alien Registration
- Deportment
- Passport
- Visa
- Vaccination
- Change of Name
- Registered Voters' Lists
- Oaths of Allegiance
- Logbooks
- Settlement Papers

- Citizenship
- Customs
- Border Crossing
- Immigrant Aid Societies

NEWSPAPER CLIPPINGS

- Announcements
    - Birth
    - Marriage
    - Anniversary
    - Death
    - Burial
- Obituaries
- Special Events
- Home Town Papers
- Professional
- Trade
- Human Interest
- Advertisements
- Local News
- Unclaimed Mail
- Legal Notices
- Probate Actions
- Auctions
- Forced Sales
- Bankruptcies
- Court Claims
- Convictions

FINANCIAL RECORDS

- Accounts
- Bills
- Receipts
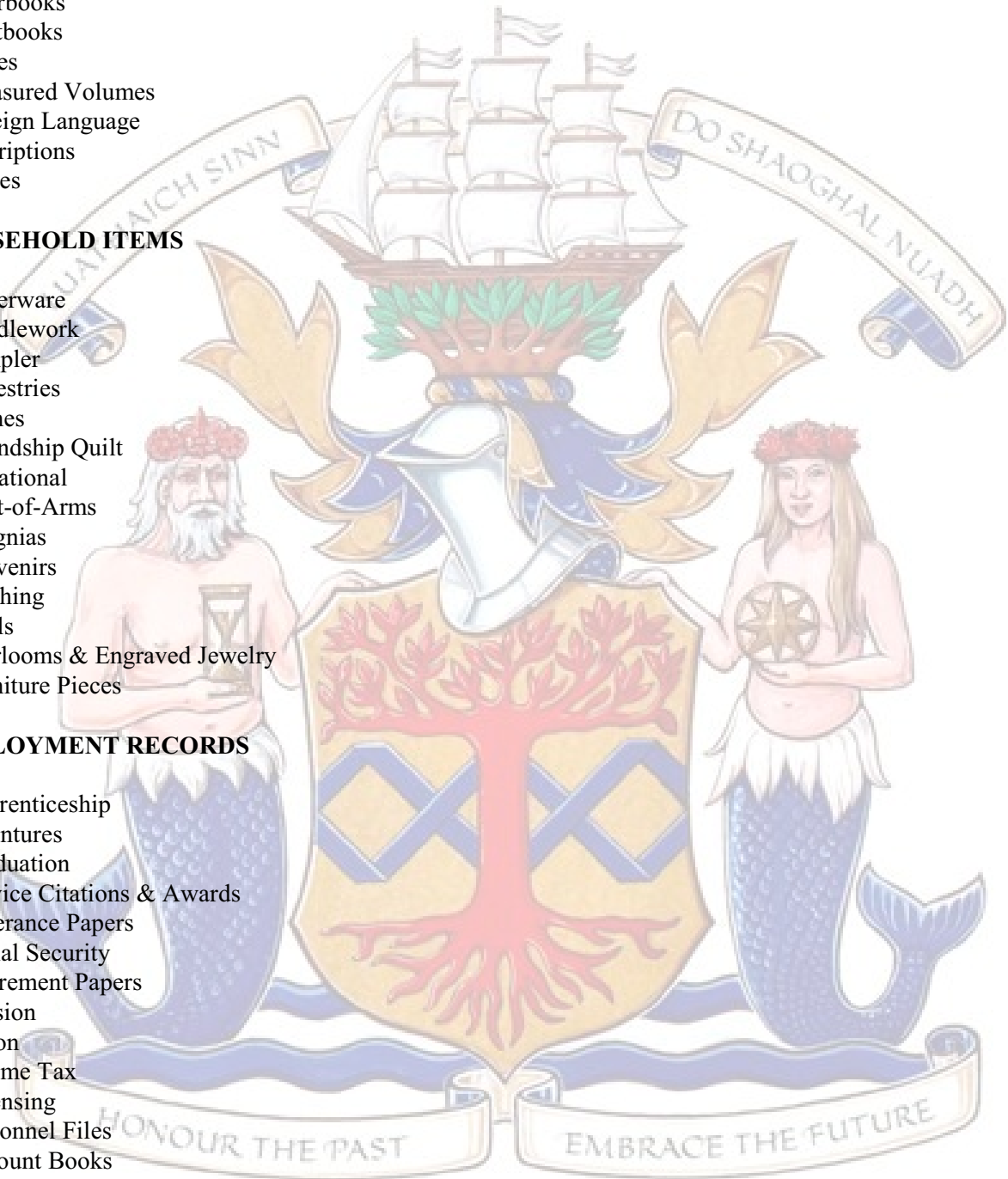- Check Stubs
- Estate Records

BOOKS

- Atlases/Maps
- Yearbooks
- Textbooks
- Prizes
- Treasured Volumes
- Foreign Language
- Inscriptions
- Bibles

HOUSEHOLD ITEMS

- Silverware
- Needlework
- Sampler
- Tapestries
- Dishes
- Friendship Quilt
- Vocational
- Coat-of-Arms
- Insignias
- Souvenirs
- Clothing
- Tools
- Heirlooms & Engraved Jewelry
- Furniture Pieces

EMPLOYMENT RECORDS

- Apprenticeship
- Indentures
- Graduation
- Service Citations & Awards
- Severance Papers
- Social Security
- Retirement Papers
- Pension
- Union
- Income Tax
- Licensing
- Personnel Files
- Account Books

- Professional Memberships
- Company/Professional Organizational Histories

COMPILED INDEXES

- Births
- Marriages
- Deaths
- International Genealogical Index (LDS)
- Ancestral File (LDS)
- Family Register (LDS)
- Family Group Records Archives (LDS)
- Temple Index Bureau (LDS)
- Accelerated Index System (LDS)

OTHER PRINTED SOURCES

- Family Histories of Others
- Census Records
- Genealogies of Others
- Biographies of Others
- Pedigrees of Others
- Ahnentafel Charts of Others
- County/Local Histories
- City. Telephone, & Professional Directories
- Compiled Monumental Inscriptions
- Genealogical Periodicals
  - Indexes
  - Queries
  - Genealogies
  - Source Extracts
  - Book Reviews
  - Historical Articles
  - Society Newsletters
- Genealogical Directories
  - The GRD (Worldwide)
  - The Big "R" (British)
  - Various Society Surname Directories
- Indexes of Private Manuscript Collections
- Personal Papers of Others
- Correspondence Files of Others

- DAR Application Files
- SAR Application Files
- UEL Application Files
- Business/Society Records
- Oral Histories
- WPA Project Records
- Official Heraldic Records

OTHER ADVANCED SOURCES

- Directed Select Mass Mailings
- CD-ROM Records
- Internet/Intranet Resources
- Knowledge of Others Connected (or Thought to be Connected) to Subject
- Personal Credit Checks

ESSENTIALS OF A GENEALOGICAL LETTER

- *THE SEVEN C's:*
    - CLEAN in appearance. Attractive letters make a favorable first impression. Typewritten, if possible.
    - CORRECT in composition. Make your letter correct in details of grammar, spelling, punctuation, sentencing, and paragraphing. Use a dictionary.
    - CLEAR in expression. A letter that is vivid, easy to read and easy to answer stimulates a reply. Definite questions usually get definite replies.
    - COURTEOUS in manner. Do not demand. Express your appreciation. Always acknowledge a reply.
    - CONSIDERATE in tone. Never write an "I" letter. Make your request so interesting that it will be answered out of a desire to help rather than merely out of a sense of duty.
    - CONCISE in wording. Go directly to the point; say it concisely and quit. Long, rambling requests often end up in the wastebasket, especially with public officials.
    - COMPLETE in thought. Communicate your problem. Give enough background information necessary for the reader to grasp your needs.

- *Supply names, dates and places*: Consider the information needed to complete what is already known about your ancestor. Do you need:
    - Date and Place of Birth?
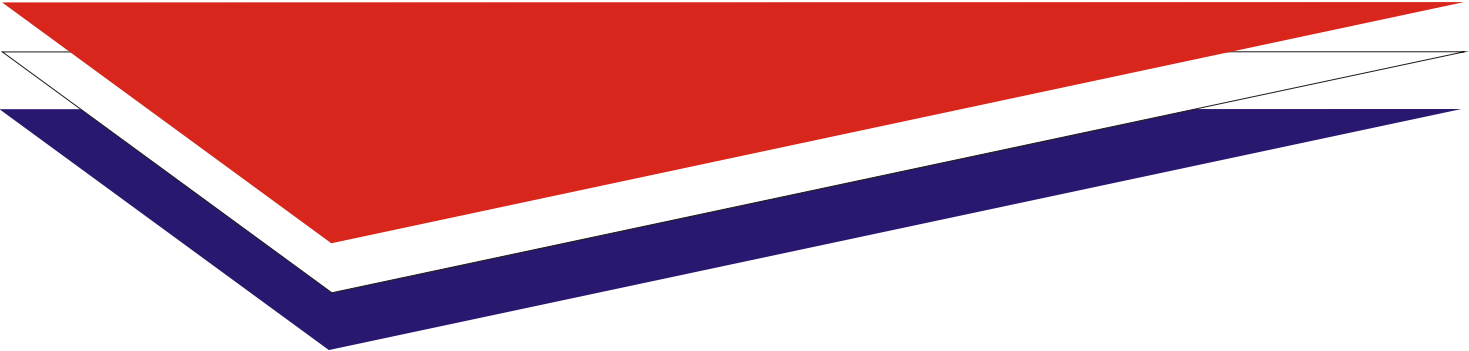   - Date and Place of Marriage?

- Date and Place of Death?
- Mother's Maiden Name?
- Names of Parents?
- Names of Missing Children?

Consider fully the type of record needed to supply the wanted information.

- *Make your request easy to answer*:
  - Ask only questions your correspondent could be expected to have answers. A few questions at a time is the best rule but remember~that too many inquires will also turn your reader off.
  - Write questions on a separate sheet of paper and leave room on it for an answer. Well-planned questionnaires can be quite effective.
  - Enclose a standard pedigree or family group charts to make it easier for your correspondent to supply names, places, dates if you do not supply a questionnaire.
  - Enclose a stamped, self-addressed envelope in letters to correspondents in your own country (except public officials and large institutions).
  - Include your own name and address on every letter you write, and date it!!

- *Insure good public relations*:
  - Never ask another to give information or make intensive studies on problems you are to 'lazy' to research for yourself. Ask for evidence instead.
  - Approach discrepancies between your records and those received with tact and diplomacy.
  - Offer to pay for copies of the records, and special postage and insurance cost for mailing the information to you. Be reasonable in your requests. Offer to give information in return for that which is being requested.
  - Remember, not everyone holds the same interest in your hobby as you do and not everyone will reply to your letters. Keep copies of your letters and follow-up on them if you do not hear from you correspondent within what you feel is a reasonable time span. If you continue not to receive a reply, do not persist. Word gets around and that is the last thing you want - you want to foster cooperation not opposition!! More than likely you will have other alternatives to seek out the information you desire.

INTRODUCTION FOR BEGINNING

Your biggest source for initiation of your project is yourself and your blood family - both direct and extended. And don't underestimate the oral history and knowledge that has been passed-down over the years by family members - intentionally or otherwise!

1. So, firstly begin with yourself then work back in time through your direct blood ancestors and then your extended blood relatives. Document everything you know or have heard on our family members.

2. Once you have written down everything you know about each individual, glean whatever J information you can from old documents, letters, family bibles/journals, visits with family members, old wedding invitations, birth/marriage/death announcements, church or local history books, school yearbooks, old photographs, diaries, etc. Even old clothing and furniture that has been passed-down has a history and someone in the family probably knows something about the item in question who can provide other factual information through discussion of that item, and at least, background material for your ultimate family historical text.

3. Lastly, only upon your compilation of all this information you have been able to gather over many months, no matter how factual or fictitious it may seem, are you ready to start your real research and effort in determining your 'blood line history'! These, that follow, along with your own determination are the source references that will ascertain your success or failure in unfolding your project. Most importantly, keep in mind that you must be constantly evaluating all the data and sources you find and use, for their reliability. The old adage, "don't believe half of what you read and even less on what you hear" is so true in genealogy!! Try to confirm everything at least once via another source! Three main events that need especially to be verified are:

   a. Birth records (christening/Baptism)
   b. Marriage and/or Divorce records
   c. Death records (burials)

   Recent events of these can be verified with Civil records. In Canada and the U.S., these records are under the control of the Provincial/ State Government and they begin at different dates depending when the province/state was formed. Earlier events which took place before civil registration began must be verified by using church records for these events (christening, marriages [by banns] and burials).

Remember, what you are recording for each subject is preparing a set of identifiers by which to uniquely identify each person in your genealogy. These unique BMD identifiers are the basis of genealogical research. Use the checklist of resources previously provided in this held program to assist you to expand your search strategies and options.

CATEGORIZATION OF DATA TYPE

Genealogists categorize data in three different classifications and you should document how you would classify your finding upon review of the material because, without question you will refer back to it at some later date and may want to know just how *sure you* were of the *goldmine* of information you found.

(0) - Sources where speculation and/or supposition hold the reliability of the data in question. For example, if we know that Uncle Harry was born in 1924, but we don't know any other information, siblings of his, or his parents birth dates, we might speculate that his parents were born in about 1900. But that's all this is, non-substantiative speculation and should be treated as such with great care!;

(1) - Secondary Sources are those which provide data that has been copied from other sources and/or at a date later than the occurrence of the event itself (ea. birth dates found on a marriage or death certificate). Secondary sources of information, such as local histories, can be a tremendous guide for you but beware that articles in them are often biased depending on the writer; and

(2 and 3) - Primary Sources are those which provide data from original documents and/or entries made at the time of the event (e.g.. entries made in the family bible at the time of the event). These are usually the most reliable, but even with them, keep an open mind!! Only record source information as a type 3 (the highest classification) when you have multiple confirming pieces of evidence. With the preponderance of the evidence cases, evidence is unsubstantial to class the overall category as completely reliable.

Don't be afraid to change your classification of the material later on if you find it necessary. You may find later in your research that the information on the birth certificate for Uncle Harry, for example, wasn't as reliable as first thought as the information elements even within these documents should and can also be classified in these categories!!

EXTENDED RESOURCE INSTITUTIONS

There are a host of other major institutions that as well need to be consulted somewhere in your research, but are best left till after you have exhausted your research with the local ones. With the host of source material in which to investigate, you will find this material in the following types of archival institutions, not including your own home survey results or those collections held by non-institutions:

Local Institutions:
- A).	Local Libraries, Museums, Archives
- B).	University Libraries (Main & Faculty)
- C).	L.D.S. Family History Centres
- D).	Government Libraries & Institutions
- E).	Professional Organizations - Branch/sister Offices
- F).	Local Court Offices
- G).	Local Registrar Offices
- H).	Local Church Libraries, Archives
- I).	Genealogical/Historical Societies/Special Interest Group

Out-of-Area Institutions:

A).   Provincial/State/Territorial (Legislative) Libraries
B).   County Libraries, Museums, Archives
C).   National Library/National Archives
D).   Town/City-Specific Libraries, Museums, Archives
E).   Town/City-Specific Newspaper Offices
F).   Town/City-Specific Funeral Home Offices
G).   Town/City-Specific Cemetery Offices
H).   Town/City-Specific University Libraries (Main & Faculty)
I).   Municipal, County, State, Federal Government Agencies & Departments
J).   Professional Organizations - Head Office or Branch/Sister Offices
K).   Location-Specific Court Offices
L).   Location-Specific Registrar Offices
M).   Location-Specific Church Libraries, Archives
N).   Location-Specific Genealogical/Historical Societies/Special Interest Group

Don't get 'hung-up' with remembering sources and institutions but simply keep in mind that there is a 'source or institution' out there for you to follow-up with when researching a problem. The exercise then, simply, becomes an activity in determining which and what it is.

Focus in on the immediate problem at hand, determine the institutions you may have available to you as well as the source material they hold for this 'detective work', then research your findings, Don't try to deal with every missing family member or problem you have all at once because then you will "lose sight of the forest for the trees"!!

You'll never know every source and every institution available to you so don't even try to. Simply isolate the basics of your problem and start with what material you can uncover to begin with. That will lead to other sources and other institutions to follow-through with.

INDEX OF PRIME GENEALOGICAL SOURCES TO SEARCH

The following is a partial list of potential sources to search and is intended only as a guide or check list when searching for that 'illusive ancestor'. Consult your local repositories and institutions first before contacting any extended sources. Most of these items can be searched on premise, ordered-through, or addresses for writing obtained from, the local archives and libraries in your region:

Ad in Genealogical Journal

Placement of an ad in a society journal or family association journal. Place an ad in a leading genealogical periodical seeking information on an ancestor if you exhaust your available known sources. Contact the local archives and

libraries in your region for addresses of such publications.

Apprenticeship Records (British)

Available from the 13th to 19th century in printed form and on microfilm, indexed by name and date. If not possible to check personally have a hired researcher check apprentice register for you.

Bible Records

Large numbers usually collected on microfilm in local archives for the areas you are searching in. Alternative is to write to the local areas genealogical society or place an advertisement in the area newspaper or genealogical journal. Contact the local archives and libraries in your region for addresses of these institutions.

Biographies

A number of printed biographical indexes are available. Ask local librarians for direction to biographical dictionaries.

Birth Records

Often obtainable from proper state, county or city officials. Contact the local archives and libraries in your region for the appropriate addresses to write.

Cemetery Records

Check local archives for monumental transcriptions for your area. If nothing is available refer to Directories Section in the library for cemetery's and their addresses in the area being searched. If still unsuccessful contact local town or city office, they should have name of sexton or cemetery association address. Alternative: Contact the areas local public library with address found in Ayer's Library Directory (U.S.).
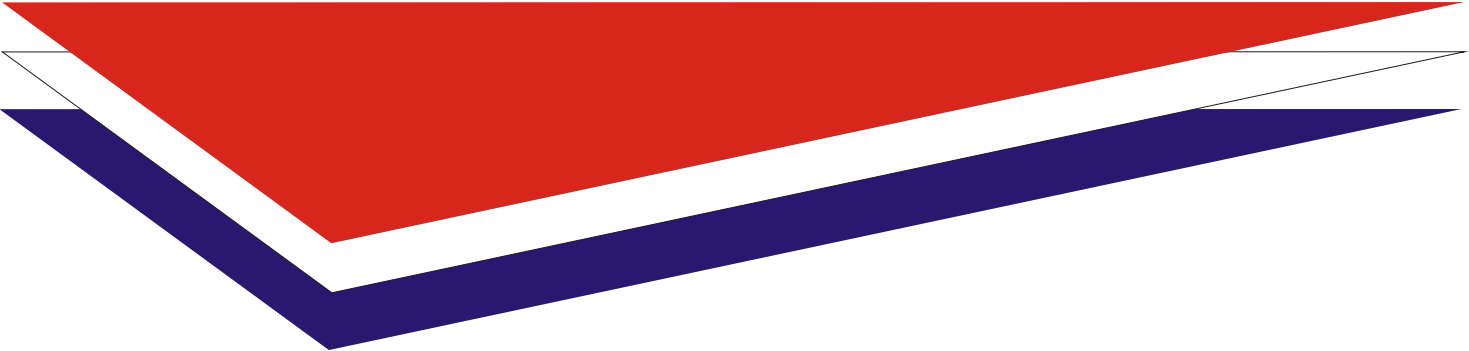
Cemetery Locations

Write to Provincial/State Department of Highways. Should have county maps showing location of cemeteries. Check with local archives with extensive map collections first.

Census Returns

Most important returns for most countries are available from 1841 to 1911 and in the U.S. up to 1940. Contact the local institutions for ordering-in of foreign returns. Also examine online sources such as *Ancestry.com*.

Church Records

If known, write directly to church. If unknown, SASE to local genealogical society. For Canadian addresses, check Angus Baxter *"In Search of Your Canadian Roots"*; for British addresses check *"Genealogical Research in England and Wales"* Vol. I, Ch. 16; for U.S.A. sources check *"A Survey of American Church Records"* by E. Kay Kirkham, Everton Publishers Inc.

City and Town Atlas

Write to city court house to see if atlas for the time period of your ancestor was printed if local sources prove fruitless.

City or Town Directories

Write to local public library for the area to ask if directory of time period of ancestor was printed and available. Check local archives first in Directories Sections.

Citizenship

Refer to Immigration and Naturalization.

Compendium of Biography

Many counties of U.S., Australia, the U.K., and Canada printed biographies of local citizens, especially between 1880 and 1910. Write local library to see if your ancestor is included. Generally only included wealthier and prominent citizens. Request photocopy, enclose SAE and offer to pay for photocopying. Enclosing small money order is appropriate. Obtain addresses from local archives in Directories Section.

County Atlas

Write to County Office (Canadian), County Record Office (British) or County Courthouse (U.S.). Enquire if atlas has been compiled. Offer to pay for photocopying. Check with major map collections locally first. Enclose small money order or SAE and I.R.C if writing.

County History

Available for many English-speaking countries. Write to county record office to see if available. Canadian and U.S. histories may be available through inter-library loan.

County Maps

Usually available from the province or state Department of Highways. Also write city tourist information centres. Check with major map collections locally first.

Court Records

Write court at county seat, state or provincial archives. Consult *"Genealogical Evidence"* by Noel C. Stevenson, Aegean Book Press. Obtain addresses from the Directories Section of local archives.

Death Records

Refer to Birth Records and follow same procedure.

Divorce Record

Write provincial courthouse for location and availability. Enquire of county courthouse concerning indexes and searches, fee. Obtain addresses from the Directories Section local archives.

Family Organization/Family Publication

To see if a family organization and/or publication exits for your ancestor's surname, consult the Internet.

Fraternal Organizations

(e.g.. Masons, IOOF, etc.) - Check Yates and Akey, *"Encyclopedia of Associations"*. Write head office for information on local branches.

Gazetteers

To locate area, county, town, city, village, region of ancestor; numerous countries available.

Genealogical Book Sources

Check Schreiner-Yantis, *"Genealogical and Local History Books"*. Also browse through the shelves at the local Calgary archives.

Genealogical Columns

Write to the genealogical society in the location of your ancestor to ask if there is a genealogical column in the newspaper or magazine of the region. If so, place a query regarding your ancestor. Obtain addresses from the local archives.

Genealogical Periodicals

Check this publication for ads of other periodicals and area researchers.

Genealogical Societies

Join local genealogical society in ancestor's region, county, city, country. Many will print queries, offer assistance to members, list local researchers, etc. Obtain address from local archives.

Government Resources

For addresses on the location of government records consult Elizabeth Petty Bentley's, "The Genealogists' Address Book". Obtain addresses also from local archives.

Heraldry

Consult Debrett's "Family Historian"; L.G. Pine's, "*The Genealogists Encyclopedia*", Part 2. Write the Heraldry Society of Canada, The Lord Lyon's Office in Scotland, The Chief Herald of Ireland or The Chief Herald of England for Canadian and British work.

Homestead Records

Cummins Homestead Maps, Alberta Homestead Record, Ontario Land Records are all available locally. Try to identify the exact location of your ancestors homestead first through land record registry held provincially or by state. From their records may be obtain from Library and Archives Canada or through an existing government agency.

Home Search

First step in all research!! The list is endless. Don't overlook diaries, letters, backs of photographs, documents, Bibles, newspaper clippings (obituaries, etc.), deeds, religious certificates, estate papers, insurance records, keepsakes, naturalization papers, pension papers, record books, school report cards, taxation records, union papers, ad infinitum!!

Immigration and Naturalization

Contact State agency for address on holdings of these records and access for the country in which you are researching. Addresses can be obtain from local archives.

Libraries

Major source for obtaining most information required by genealogists. Become familiar with your local archives and the types of material they hold.

Locality Finding Aids

There are frequently special publications printed by individuals or societies to aid in local genealogical research. Write

to researching area genealogical societies and ask for a list of publications and finding aids. Check ads in magazines for special publications, also book reviews in same publication.

Maps

Often available from provincial or state highways divisions. Consult local libraries & archives for addresses and those with major map collections.

Marriage Records

Refer to Birth Records and follow same procedure.

Microfilm Records

The LDS Library has hundred of thousands of records of every type. Visit local branch of LDS Library and other local archives for a description of their microfilm holdings. Keep in mind that what is not available locally can be brought in by inter-library loan in most cases!

Military Records

U.S.A.: For a free list of federal records centers addresses write to General Service Administration, Washington, DC, U.S.A. 20408. Civil War Records, Revolutionary War Records: Books by Dr. George Schweitzer are most helpful. Canada: Contact the National Archives Personnel Section. For foreign militaries contact the appropriate government department. Contact local archives for designated addresses.

Mortuary Records

Sometimes available for many years back; occasionally destroyed when funeral home changes hand. Write to town office or local area library for names and addresses of funeral directors or if in the U.S., check Kates, *"American Blue Book of Funeral Directors"*. Obtain addresses from the Directories section of the local library or archives.

Newspapers

Thousands of old newspapers have been microfilmed. Check *"Ayer's Directory of Publications"* for first date of newspapers publication. Write state or provincial archives and historical societies to see if available. Order through inter-library loan and if you have a specific date, write to the areas local library for a photocopy of the item (e.g.. obituary). They may or may not charge you for the search and photocopy costs. Addresses for institutions can be obtained from the Directories Section of your local archives.

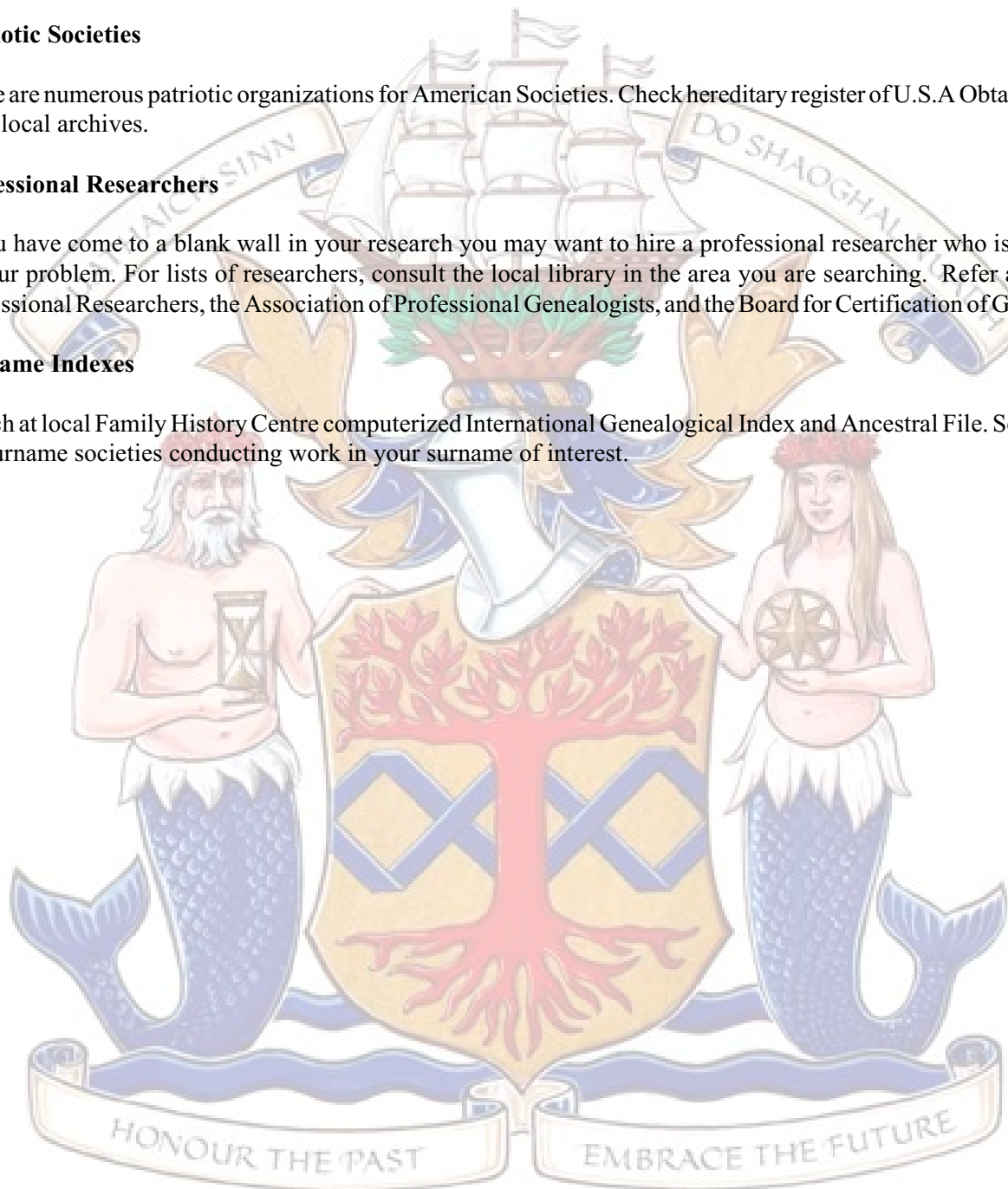**Obituaries**

Refer to Newspapers.

Patriotic Societies

There are numerous patriotic organizations for American Societies. Check hereditary register of U.S.A Obtain addresses from local archives.

Professional Researchers

If you have come to a blank wall in your research you may want to hire a professional researcher who is a specialist in your problem. For lists of researchers, consult the local library in the area you are searching. Refer also to local Professional Researchers, the Association of Professional Genealogists, and the Board for Certification of Genealogists.

Surname Indexes

Search at local Family History Centre computerized International Genealogical Index and Ancestral File. Search online for surname societies conducting work in your surname of interest.

Telephone Directories

Check with your local archives Directories Section. Try writing individuals with the same last name in the area you are searching.

Wills And Probate Records

Wills are public property. Anyone may acquire a copy of any will. CANADA: Filed wills commenced with the development of probate courts in each area and province of Canada, although unified wills may exist for earlier periods, locations will vary. For example, Alberta has 12 judicial districts and wills are generally filed at the closest registry to the residence of the deceased. In Nova Scotia, all wills are filed with the probate registry in the county where the deceased resided. Write to the provincial court to find the specific address(es) for each province. U.K.: 1380 to present in local custody. Some on microfilm from LDS, some of these are indexed and some were destroyed by bombing in WW II. U.S.: Locate custodian of will and probate records in ancestor's county by examining *"The Handy Book for Genealogists"* published by Everton Publishers Inc. Write to custodian and enclose small money order and SAE. If no reply, write local library of genealogical society for local researchers. If specific death date known, send small money order and request photocopy of probate and offer to pay for further costs.
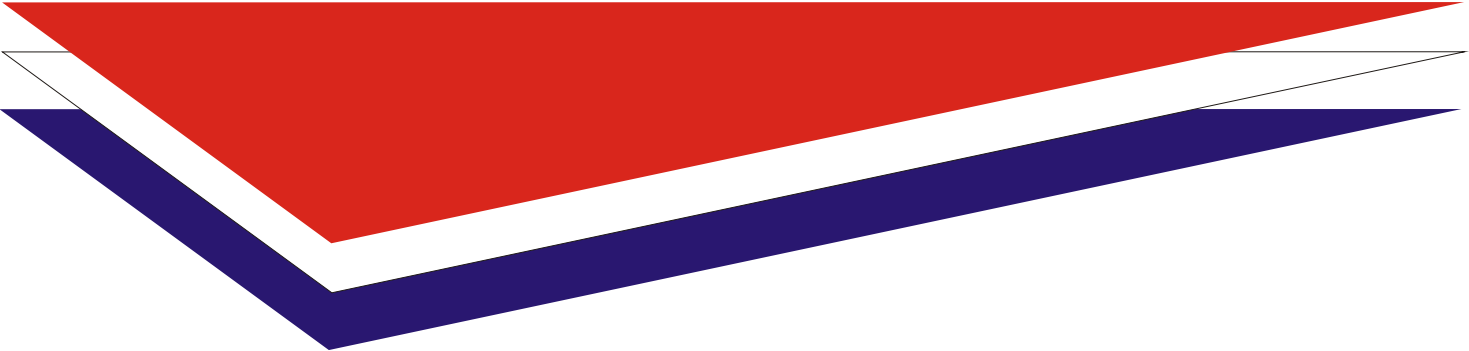
COMPUTER HARDWARE AND SOFTWARE FOR THE GENEALOGIST

A. HARDWARE AND EQUIPMENT

Computer hardware and its associated equipment is varied and requires an important level of review by the buyer before ever making a purchase. Things like capability, compatibility with software and other hardware, price, effectiveness in its anticipated use to your objectives, etc. are all things that need to be considered when making such a purchase.

First sights should be set on defining, generally, what it is you want the machine to do for you? What sort of output do you want to get from it? And how much do you want to spend in order to get it?

From here, one should then first consider the general types of programs that you want and what you expect from these programs. Once you have decided the programs you want to purchase, exactly, then are you ready to look at the various types of hardware and accessories that will work with those programs. There is no point in 'purchasing a Cadillac if it won't run for you'! In other words, you want to buy the programs that will give you what you want (as far as output is concerned), and to do that you need to have a system that will run those programs, so don't try to force the decision the other way because it will not work!!

Join a local computer group or get some advice from friends or acquaintances before actually looking, and most importantly get some books to read on the subject. This will give you an idea as to what some of the terminology is and what the machines will do for you. It is not necessary to become a 'guru' on the subject only to understand the type of 'black box' you are looking at and the 'bells and whistles' you want on it when you buy the machine. In addition, please don't underestimate your usage for the computer and printer when deciding on your choices. Be assured that you will find a great number of things to do with it once you become familiar and at ease with the system you buy. It is very difficult (and expensive) to upgrade a system later if the system hasn't got upgrade potential!!

B. MAJOR SOFTWARE AVAILABLE and CAPABILITIES

There are many software programs designed to assemble your information and they come in a wide range of prices and flexibility.

Shop around before you invest in one. Prices range from inexpensive public domain or shareware to programs which are several hundred dollars in cost. Again, you would be well-advised to join a local genealogical group to get advice in this area. Contact suppliers of their genealogy products and get a copy of their sales brochures and demo disks so you can view the programs' capabilities and shortcomings. There is no one best program for everyone!! Every single person has different expectations and wants different things from their programs. Only you can decide on what is good for you!!

Keep in mind though, that you should be able to access the program easily and to assemble or print lists/charts as you require them with little difficulty. Variable fields have more flexibility but require more configuring. Fixed fields are generally more user-friendly but are less flexible.

C. COMPUTER BULLETIN BOARDS, THE INTERNET, and THE GENEALOGIST

Once up and running with your computer, you may want to upgrade your system with an internet connection. This will allow you to communicate with other computer users - genealogist or otherwise - and of course even the widening Internet experience. Thereby exchanging other programs and information, collecting other programs and information or sending your files and information to someone else.

This is a separate hobby in itself but many genealogists now use this network of contacts world-wide to exchange information and views on the subject. It is a worthwhile addition to your genealogy hobby to get into this after you have become familiar with your own system and genealogy material. In addition, do not overlook the enormous potential for accessing source information for your genealogy from the Internet. Though not yet extensive, a great deal of material is still available from this source of the this kind and will only increase in numbers and ease of access as the Internet grows.

D. PUBLISHING YOUR GENEALOGICAL WORK

Publishing your genealogical work is the aspiration of everyone involved in the profession. Either formal publication or some other form of informal presentation. The options open to you are really endless and will depend on your priorities, the amount of material you have gathered, its format and, of course, the amount of money you want to spend.

It would be an understatement to say that the cost today of formally publishing your genealogical work is almost out of reach for the average hobbyist, however there are many alternatives open to you in getting around this.

One of the most exciting things happening today is the development of home publishing or desk-top publishing facilities. Given the right computer hardware and software, you have the potential for an at home publishing system but even with this there is still a substantial investment.

But without spending a great deal of time on this subject, let it be said that this is an area you want to keep in mind right from the beginning because the output you develop from your genealogy/word processing system will reflect the kind of output you will be able to put together in developing your final genealogical presentation.

Enjoy your hobby, become a contributor to the profession, and join a local genealogy group. We all will benefit from your family's history, your knowledge and your contributions. Happy Head-Hunting"! !

*Brian W. Hutchison - Chairman & C.E.O. of GEN-FIND Research Associates, Inc. with over 40 years of related research & management experience. A forensic genealogist & heraldist, he is very active with many local/regional/international genealogical & heraldic bodies, for which he has served on numerous committees & board directorships in various capacities over two decades. Author of a myriad of publications — treatises on genealogical research issues, genealogical ''how-to'' manuals, tomes on established genealogical pedigrees - he is a past Irish Department Head for the National Institute for Genealogical Studies thru the University of Toronto. Long-established in his fields of research, Brian has lectured extensively at many local/regional/international genealogical seminars & conferences and is a well-known Canadian philanthropist & advocate for genealogical, health, and wildlife causes.

Mr. Hutchison may be contacted at GEN-FIND Research Associates, Inc., #101 - 5170 Dunster Road, Suite #521, Nanaimo, British Columbia, Canada V9T 6M4.