

## Using a Research Outline to Focus Your Genealogical Research

### By Gary Palgon

I am often asked if I can offer advice on how to start or continue genealogical research. My typical response, as you would expect, is, ‘What information do you have about the individual you are interested in?’ In order to trace your family tree, you must FOCUS on a specific goal, be it tracing back your ancestors or finding living relatives, for instance. Even the most experienced researchers cannot do it all at once. Focus on a specific individual to research, at least in the context of discussion and organization. The relatives closely related to he or she will end up being part of the research as well, but we need a starting point.

Once we focus on an individual, we can then look at what information you know about them and plan out what to research. Now you say to me, “I want to find out about my great-grandfather, Joseph Sztejn, who immigrated from Europe, but I’m not sure when.” That’s focusing on an individual! So I usually ask, “What information do you know about them?” If you’re a novice, you probably show me their picture and/or a few documents along with a pad of unorganized notes. If you’re an experienced researcher, you usually show me a pedigree or family group sheet printout from your computer. Both are useful in research, but neither allow for organized research planning or execution.

I once heard that, in general, if a person was born before 1900, their name probably existed on paper somewhere around 5,000 times. And if they were born after 1900, their name probably exists on over 1,000,000 documents. So, our goal in genealogical research, is to discover as many of those occurrences as possible. The sources of those names and exactly how many occurrences really exist will differ for each of your relatives based on when they lived and where, but I am convinced that there’s plenty of information available.

What I am about to suggest is a format for outlining a person’s life, based on the most common documents that may exist with their name on it. This will help form a research plan. This is helpful both when starting out and when hitting a brick wall. The outline also serves as a great way to share information with other genealogists when asking for advice.

The research outline that I use contains six columns:

- Date – Day and month that an event occurred
- Year – Year an event occurred. (This enables the research outline to be sorted by year)
- Event – The event that took place. (i.e. marriage, death, etc.)
- Description – Supporting details about the event including information found during the research
- Source – Source of event (i.e. death or marriage certificate)
- Status – Status of the research (i.e. needs to be researched, not found, or found)

While details of the outline may vary from person to person, the basic principles apply for all. Here are the assumptions used for the research scenario below. Joseph Sztejn died on August 15, 1933 in New York City, (Manhattan) New York. Beyond that, as mentioned above, we know that he immigrated from Europe. At this point, our research outline should look as follows:

## Joseph Sztejn – Searching for Birth Place

Date	Year	Event	Description	Source	Status
Aug 15	1933	Death	Joseph Sztejn, New York City, Manhattan, New York	Hearsay – Death Certificate	SEARCH
		Immigration		Hearsay	
		Birth	Europe	Hearsay	

I have labeled the status of the Death event as SEARCH since we are able to look for Joseph's death certificate. Now, let's look at the timeframe and places in which he lived. Now we can determine what records existed. I have added some records to the research outline below. [The changes are listed in italics. A novice researcher may not know about these sources, however, showing the SIMPLE outline from above to an experienced researchers allows them to provide quick guidance.

## Joseph Sztejn – Searching for Birth Place

Date	Year	Event	Description	Source	Status
		Burial			
<i>Aug 15-20</i>	<i>1933</i>	<i>Obituary</i>	<i>New York Times</i>		<i>SEARCH</i>
<i>Aug 15</i>	<i>1933</i>	<i>Death</i>	<i>Joseph Sztejn, New York City, Manhattan, New York</i>	<i>Death Certificate</i>	<i>Found</i>
	<i>1930</i>	<i>Census</i>	<i>New York City, Manhattan, New York</i>		<i>SEARCH</i>
	<i>1920</i>	<i>Census</i>	<i>New York City, Manhattan, New York</i>		<i>SEARCH</i>
	<i>1910</i>	<i>Census</i>	<i>New York City, Manhattan, New York</i>		<i>SEARCH</i>
	<i>1900</i>	<i>Census</i>	<i>New York City, Manhattan, New York</i>		
		<i>Social Security Application</i>			<i>SEARCH</i>
		<i>Naturalization</i>			<i>SEARCH</i>
		Immigration		Hearsay	
		Birth	Europe	Hearsay	

Let's review each record we have added and why it was included. This will help you follow through with the advice.

- Burial – Assuming that we do not know where Joseph was buried, this is a research goal. However, we can find this out by obtaining his death certificate. His tombstone may have both his and his father's Hebrew names which could be useful information in the future.
- Obituary – Since he died in New York, search the New York Times or the New York Jewish Forward. A span of days is listed in the Date column since we do not know when or if it was published.
- Death – His death certificate may provide several clues including the cemetery he was buried, his social security number, and the name of the informant who may be someone we want to contact, if they are still alive. Since he died in New York City, we can search the New York City death index.
- Census (1930, 1920, 1910, 1900, etc..) – Joseph was alive and in New York (we believe) during the Federal Census(es)
- Social Security Application – Social Security did not really start until the 1930s so we will have to determine if his death in 1933 was too early in the process for him to have a Social Security Record.

- Naturalization – We don't know if Joseph became a naturalized citizen or not, but since he was an immigrant, it is worth checking into.

At this point, it is time for the genealogist to figure out how to obtain these documents. During the research process, update the research outline with what you have found. The research outline below has been updated. The items that were updated appear in italics.

### Joseph Sztejn – Searching for Birth Place

Date	Year	Event	Description	Source	Status
		Social Security Application	<i>Social Security Death Index – Ancestry.com</i>		<i>Not Available for 1933</i>
Aug 18	1933	Burial	Machpelah Cemetery	Cemetery	Found
Aug 15-20	1933	Obituary	New York Times		SEARCH – <i>Local library</i>
Aug 15	1933	Death	Joseph Sztejn, New York City, Manhattan, New York	Death Certificate	Found
	1930	Census	New York City, Manhattan, New York <i>Requires address – see City Directory below</i>		<i>Search when available – Nat. Archives</i>
	1930	City Directory	New York City – Joseph Sztejn		SEARCH – Nat. Archives
	1920	Census	New York City, Manhattan, New York <i>Soundex: S325</i>		SEARCH – Nat. Archives
	1910	Census	New York City, Manhattan, New York <i>CD Index</i>		SEARCH – JGS Library
	1900	Census	New York City, Manhattan, New York <i>Soundex: S325</i> <i>311 West 105<sup>th</sup> Street.</i> <i>Joseph Sztejn 48 years old; immigrated 1892; naturalized 1899; married 3 years</i>		Found
		Naturalization			
	1897	Married		<i>1900 Census NY</i>	<i>SEARCH</i>
	1892	Immigration		<i>1900 Census NY</i>	<i>SEARCH</i>
	1852	Birth	Europe	Hearsay for Europe; <i>1900 Census NY for year</i>	

- Social Security Application – This was moved up since it was determined that they were not available until after 1933. The description shows the source of information could have been found in the Social Security Death Index at Ancestry.com. The status is 'Not available for 1933'. Listing sources on your research outline is useful when asking advice from fellow genealogists.
- Burial – The death certificate noted he was buried in the Machpelah Cemetery in Queens, New York. We contacted the cemetery. They confirmed the date of death and did not have a birthplace listed in their records or on the tombstone.
- Obituary - The New York Times is available on microfilm at our local library. This is noted in the status column as a research task.

- 1930 Census – The 1930 Federal Census does not become available until April 2002. However, it was determined that you must know the address of the person to access the records so a research event was added below it to search the city directory.
- 1930 City Directory – As noted above, the address of an individual is required to access the 1930 Federal Census for New York within New York City. We can research this prior to April 2002.
- 1920 Census – This census is available from the National Archives and therefore is noted in the status column. Additionally, it is indexed by Soundex so that number was computed (using JewishGen's Tools section) and documented for Sztejn as S325.
- 1910 Census – This census was not soundexed for New York City, however, an index is available on CD-ROM at the library of our Jewish Genealogical Society. Both these facts are noted.
- 1900 Census – We had updated it to perform the search at the National Archives under Soundex S325 and then actually performed the search. It provided us with some useful details which were noted including his address at the time, age, year of immigration, that he was naturalized and the number of years married. Therefore, we were able to add the events for Marriage in 1897, Immigration in 1892, and Birth in 1852. Note that the Source field for these events now shows 1900 Census since this is where the information found.

Continue researching the other events and documenting the results on the research outline.

In order to find out our ancestor's place of birth, you may need to continue your research outline to include events such as: Probate of Estate, Will, Funeral Home, Property Records, Marriage, and Passenger Lists. Each would be added based on clues provided from other records. For instance, maybe the cemetery knows the name of the funeral home that was used for burial. Maybe the census shows what year he was naturalized, married for 19 years, and had been in the United States for 27 years. These are the clues that frame his life within the research outline.

Let's say we are still lacking information about Joseph's birth. Maybe access to these documents provide the information or maybe not. Assuming they do not, just to make our scenario a little more difficult, what other records may have this information? Back to one of the early suppositions, his name should be able to be found at least 5,000 times, so we say. While still focusing on Joseph specifically, the documents of other individuals in his family may have information about him as well. Therefore, we need to also add these documents to Joseph's research outline. Some examples are:

- Birth Son – His sons' birth certificates. Many times the birthplace of the parent is listed.
- Marriage Daughter – His daughters' marriage certificates. Many times the birthplace of the parent is listed. If the child was born in Europe, the certificate may be a good source for a probable residence or birthplace of Joseph.
- Death Certificate Son – Again, the birthplace of the parents may be listed.

As a novice genealogist, you may not know about that each of these documents can be obtained or if they still exist, but a more experienced one can help. For the experienced researcher, the picture becomes quite clear. The research outline is now a solid representation of the person's life, the documents that may be useful in unfolding the person's genealogy and, most importantly, a tool to share with other genealogists to gain input on the next research track.

I have used these for about the last 10 years of my 22 years of doing genealogical research and found them to be quite useful as a way for me to keep track of what I am researching, where I need to go to do the research, and as a means of feedback when obtaining ideas from others. Most recently, I have found them to be quite understandable to individuals not familiar with genealogy. I have sent them to people that live in with hopes they can make recommendations about what research documents are available in their town. I hope you too find the research outline useful in your research, whether you are just beginning or an old pro.