Genealogy Do-Over – Step 2

Topics: 1) Establishing Base Practices and Guidelines and 2) Setting Research Goals

As we move into the second step of the Genealogy Do-Over, and since we've tackled the Step One topics, I want you to take yourself back to when you first became interested in genealogy and family history. Were you a teenager like me who watched the mini-series *Roots* on television? Did you have a family history related assignment in high school or Sunday school? Or did you just hear others in your family discuss ancestors and you decided to do some research?

In Step Two you are back at square one. **Back where you started**. But you have more knowledge and access to more tools than that first time. And you're going to heed the same advice you would give any other newcomer to genealogy: **start with yourself**.

Sit down and record what you know about your own history (birth, marriage, children, religious rites and sacraments, etc.). Then move on to your parents and siblings. And once you've recorded information, you'll set your initial research goals based on that information.

Establishing Base Practices and Guidelines

This topic offers lots of room for trying different approaches; however, most genealogists who have been researching for the past few years will likely have the same concerns and the same common practices.

I have already outlined many of my self-imposed guidelines in the ***My Golden Rules of Genealogy***. If I had to prioritize the areas and procedures, the list would include:
1) track all work, even dead ends, negative evidence and non-productive searches;
2) cite sources, even if in a rudimentary manner to note the "what, where and when" information about a record; 3) make the "first pass the only pass" which means slow down and spend as much time as needed on a document or source and wring every bit of information out of it. Later on in The Genealogy Do-Over process, I will have to decide on a file naming convention and a genealogy database software program.

Setting Research Goals

While I have listed this topic first in this step's series of topics, you really need some initial data before you can set research goals. Very often people set goals such as "trace my family's Irish roots" that are too broad or are based on family lore or assumptions.

Set goals based on information from personal knowledge; do not worry if you believe some information is incorrect. In **Step Three** we will create research goals to prove or disprove data points. Create a simple list such as "verify birth location for _____" or "determine parents of _____." In Step Three these goals will form the start of your research plan.

Step 2 To Do List – Full Do-Over Participants

- **Establishing Base Practices and Guidelines**: <u>Do not gloss over this topic</u>! Spend some serious time outlining what procedures you will use to research, both online and offline. If a process is too cumbersome, you will not stick with it. Come up with a list of five (5) top procedures that you can handle during The Genealogy Do-Over.

- **Setting Research Goals**: Use paper, Evernote, OneNote, Microsoft Word or any program to track your research goals.

Step 2 To Do List – Review or "Go-Over" Participants

- **Establishing Base Practices and Guidelines**: Review the procedures that other participants will be using; **The Genealogy Do-Over Facebook Group** is a good place. If you feel you already have solid research procedures, keep using them. If you need to change your research habits, write down the changes and commit to them over the course of The Genealogy Do-Over.

- **Setting Research Goals**: If you have existing lists of research goals, verify that they are in line with any family group sheet data. Create new goals based on new insights after reviewing the data.

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