

Understanding and Using Genealogy Research Plans

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BSOs (Bright Shiny Objects)...distractions...rabbit holes...whatever you call them the unfocused, random research efforts that every genealogist experiences can become problematic if not reined in. Research plans are great tools to help genealogists rein in the distractions and help you be a more efficient researcher.

Purposes of a Research Plan

- Maintains focus
- Organization
- Resource management
- Communication
- Evaluation

Key Components

- Date
- Research objective or research question
- Background information and known facts
- Records and resources to check
- Potential challenges and solutions
- Research strategy
- Expected outcomes
- Findings and analysis
- Conclusion

Other Components

- Summary or review of previous research
- Hypothesis
- Timeline
- Suggestions for future research
- Results summary

➤ Research Plan Format Options

- Paper
- Writing tools
 - ❖ MS Word
 - ❖ Google Docs
 - ❖ Apple Pages
- Note-taking tools
 - ❖ Evernote
 - ❖ OneNote
 - ❖ Notion
 - ❖ GoodNotes
 - ❖ Notability
 - ❖ Obsidian
 - ❖ Scrivener
- Spreadsheets
 - ❖ MS Excel
 - ❖ Google Sheets, etc.)
 - ❖ Apple Numbers
- Project management tools
 - ❖ Airtable
 - ❖ Asana
 - ❖ ClickUp
 - ❖ Monday.com
 - ❖ Trello
 - ❖ Wrike
 - ❖ Hive

Templates

Templates are a great place to start for many genealogy forms. Here are a few websites with research plan templates I've found to be useful:

- Family Search: Family groups, pedigrees, and research logs – https://www.familysearch.org/en/wiki/Genealogy_Research_Forms
- American Ancestors: Research Templates – <https://www.americanancestors.org/tools/research-templates>
- Cyndi's List: Research Plans, Logs, and More – <https://www.cyndislist.com/charts/research/>
- Family Tree Magazine: Free Genealogy Research Forms and Organizers – <https://familytreemagazine.com/free-genealogy-research-forms/>

Remember, just because you start with a template, doesn't mean you can't adjust it to your own needs! If you find a template you like but there are some areas that just aren't working for you, don't hesitate to make adjustments. Just remember to give credit to the template(s) you started with.

Once you have a good understanding of how to create a basic research plan, consider trying out a research plan combined with a research log. Cari A. Taplin (Genealogy Pants) did a great series of posts on "Plogs" (a combination research plan and log) that's well worth reading. Her post [Research "Plogs" – Get Started](https://genealogypants.com/2023/09/06/research-plogs-get-started/) can be found at <https://genealogypants.com/2023/09/06/research-plogs-get-started/>.