

INTRODUCTION

Organizing a research trip can initially seem overwhelming. However, through planning and preparation, the tasks can be divided into more manageable segments. There are several benefits to a research trip: 1) gaining access to records that are not available online, 2) exploring the county or city/town of your ancestors, 3) meeting local experts and family members, and 4) enhancing your research skills.

GO VS NO-GO

When planning a research trip, there are three key factors to consider: 1) the cost of the trip, 2) the goals for the trip, and 3) the workload involved. The trip should be both beneficial and productive while remaining within budget. However, this decision is not simple. For instance, the trip may be more expensive than hiring a researcher, but it could provide valuable firsthand experience in understanding the history of your ancestors.

PREPARE FOR TRIP

Review Research

The keys to a successful research trip are planning and preparation. It is essential to review the research you have completed to develop a comprehensive research plan. Ensure all online research is completed and sourced. Use the missing information to create your research questions.

Develop Research Plan

For each research question, create a research plan that includes the repositories and the collections you would like to review. Then, prioritize your research, so that if time constraints or limited access to records arise, you will get the most out of your trip to keep your research moving forward.

Research Repositories

Visit the repositories' websites to obtain information about hours of operation, records access, policies, rules, and costs for access and/or copies. Review the online catalogs and finding aids for each repository. Many repositories require an appointment to view the records. Some records are stored offsite, so it is necessary to request them in advance. Important questions to consider include: Are cameras or scanners allowed? Are pencils permitted? What are the costs of copies? Is an appointment needed?

Travel Arrangements

Remember to arrange your travel plans. Book hotels, flights, and rental cars in advance. Check local transportation options and costs. Are there subways or ride-sharing services? Research restaurants too, and find several options as they can get busy.

What to Pack

In addition to essential clothing and hygiene items, there are several other items that you should consider bringing for your travels:

- Computer/Tablet
- Pencils
- Paper
- Scanner/Camera
- Charging Cables
- Power Banks
- Small bills and change
- Credit card
- USB Drive or Flash Drive
- Online Catalog Entries of Collections of Interest
- Reference Materials (e.g., Pedigree Chart, Family Group Sheets, Timelines, Spelling Variations, Ancestor list)

Travel and Research Schedule

Create an itinerary of events that include travel, meals, and breaks. Allow yourself some leisure time or time to visit the sights while there.

DURING THE RESEARCH TRIP

Learn the layout of the repository. If you are at a library, familiarize yourself with each section of the library and note which ones are of interest to you. Do not forget about locating the restrooms. When you begin reviewing records, review the high priority items first. Be sure to keep detailed notes about the record collection so you can develop a full citation. Also record notes on the condition of the records or important details you want to remember related to your research. Scan or photocopy as you go. Be sure to ask for help if you have a question about a record or collection. The staff may be able to refer you to additional sources that will lead you to the answer to your question. Update your research plan/log after each record item or collection.

AFTER THE TRIP

After returning from your trip, organize your materials within one week. Review the materials and update your research notes, family trees, and research plans. Ensure to include full citations to document the sources of the information. Write up your research to share with family members or local genealogy societies. Finally, assess your trip. Determine what was not completed and why. Identify what worked well and what did not. Make adjustments for your next research trip accordingly.