Tree Climbing
With the San Mateo County Genealogical Society

A Beginner's Guide to Genealogical Research

with an emphasis on researching from San Mateo County

by
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San Mateo County Genealogical Society
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So you've decided to join the ranks of the millions who find it hard to pass a cemetery without wondering if some distant cousin might lie there, or a courthouse without wondering if it might hold the secret of your great-grandfather's naturalization.

Welcome!

As more and more of us look, more and more records have become available to find. Genealogical and historical societies are compiling records at a fantastic pace and the popularity of the hobby has drawn in many new commercial companies.

The genealogical community owes much to the Church of Latter Day Saints (LDS) for the filming and computerization of vital records from throughout the world. Their policy of allowing the public free access to their films and Family History Centers and the availability of their CDs for purchase at incredibly low prices have contributed greatly to the availability of research material.

This Beginner's Guide is intended to be an informal introduction to family research. It is meant to answer some of the questions every beginner has, to provide ideas on where to look for information, to introduce some San Francisco Bay Area resources, and to provide a full selection of forms to help you get started in your research.

The basic steps in your research are introduced in a very few pages, here. There are many wonderful books available that will guide you step by step though each phase of the process if you find you need more help. Included in each section of this manual are one or two good resources that are available in the SMCGS library.

The SMCGS Library is open free of charge to the public. Since this is a research library, books may not be checked out, but they can be read during library hours. Members of the Society and the CD club are allowed to check out CDs and audio tapes on many research subjects. If you find a book that you would like to have more time to read, it might be available in your local library or through an interlibrary loan.

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Part 1

Beginning a Genealogical Project

WHAT DO I NEED TO GET STARTED?

On the following pages you will find list of sources of various types of information. In the Individual and Family Forms section you will find a collection of forms. You will need to fill these out for each person that you are researching. Before you begin your research, make several photocopies of each form so you will have a supply on hand.

START WITH YOURSELF

It is always best to begin at home. Start with yourself.

★ Using the Documentation Sources as a guide, gather together all the information that you have about yourself.

★ Record the information you have just collected on the applicable forms:

- Individual's Record Checklist – itemize the information sources you have for you.
- Family Group Sheet – complete this form for the family of you and your spouse.
- Pedigree Chart – enter your name as person No. 1, along with your vital information. Don't forget to document your sources on the back of the form.
- The Ahnentafel Chart is another form of Pedigree Chart. If you wish to use this form, your name and data should be entered in the section numbered 1.

THE NEXT GENERATION

Once you have gathered all the pertinent documents for yourself it is on to your parents.

★ Collect all available information, birth certificates, marriage certificates, educational information, and military records.

★ Record the information you have just collected on the applicable forms:

- Individual's Record Checklist – itemize your information sources for each person.
- Family Group Sheet – This form will include your parents and your siblings.
- Pedigree Chart – enter your father as person No. 2 and your mother as person No. 3. (Male ancestors are always even numbers; females are odd numbers.).
- The Ahnentafel Chart is another form of Pedigree Chart. If you wish to use this form, your father is entered in Section numbered 2 and your mother in Section 3.

★ Document your sources on the back of the form.

ONE STEP FARTHER

Are your parents, aunts and uncles, and/or grandparents still alive?

★ If so:

- Ask them questions about their family.
- Use that information to continue filling in your Family Group Sheets and Pedigree chart

★ If not:

- Add their death certificates, obituaries and probate papers to your pile of information.
- Use that information to continue filling in your Family Group Sheets and Pedigree chart. (Only direct ancestors will appear on the Pedigree Chart.)

WHERE DO YOU GO FROM HERE?

Now is the time you need to think about what you are trying to accomplish.

★ Do you just want a list of relatives going back to the Mayflower? It can be impressive.

★ Some have been known to go back to William the Conqueror and Charlemagne (although there are usually a few weak links). Fame by association would seem to be the goal.

★ Do you want a family story? A tree with personality?

- If so, now is the time to collect all the stories you can from parents, grandparents, aunts, uncles, neighbors in small towns etc. Make it your priority. People don't live forever, but the books and hopefully the CDs will still be there many years from now.
- In the Individual and Family Forms section you will find an Oral Interview Check Sheet. Use this interview form only as a guide; think of your own questions, based on what you know about the person and what you hear as the interview progresses.

There are many good books on conducting and taping interviews. This is the ideal way to preserve today's memories. You not only get the story, but also the intonation and the voice. (If a relative refuses to be taped or seems stressed by it, then write down what you hear to the best of your ability.)

Your oral interview should be transcribed and a copy of the tape made. (Be sure to recopy the tape periodically to avoid deterioration over time.) Give a copy to the interviewee for comment and correction. Often the reading of a story will remind the person of another anecdote, or a missing part of the first.

The following pages give you some sources you can use to collect your vital statistics information. Keep in mind it is often easier to work backwards from death to birth when putting together the life of a person.

Death Documentation Sources

Death certificate from state office in state where person died or from county registrar or other official at county courthouse.

Obituary best for date and place of death but not conclusive evidence and should show in what paper it was printed and date of publication.

Mortuary Records, often free, may include both death certificate and obituary so check here first if you know where ancestor died and/or is buried.

Memorial Cards usually given as part of the funeral.

Cemetery records, either original or from copied records. Try to get a picture of tombstone inscription and a map of the cemetery. Do ask who else of the same surname is buried there and who else is in that plot.

Family Bible records including a title page with date of publication of Bible. Other family records may be journals and diaries.

Church records, indicate whether you have an original certificate or an extraction from a register. If it is an extraction, did you see the original record, a copy on microfilm or did someone else provide you with the abstraction?

Probate or estate records usually held at the local courthouse but some older records may be in county or state archives; this includes wills, administrations and orphan court records.

Insurance policies might give date of death of relatives of person who took out the policy.

Military service and pension papers may give date of death of pensioner, date of last payment before his death, wife's date of death.

County or local histories are often inaccurate but provide clues for further research.

Printed vital statistics especially for Massachusettes and other New England states.

Town clerk's records may possibly mention of a death, perhaps in connection to business or land deals .

Lodge records often mention commemorations presented upon death.

Mortality schedules taken in connection with federal census for 12 months prior to census enumerations of 1850, 1860, 1870, 1880.

City directories rarely give an actual date of death. However, sometimes a notation is made that a person died within the year, or an approximate dated can be estimated when person no longer appears with family. *These directories will sometimes note if a person moved out of the area within the year and where they relocated* .

Coroners' files can provide a wealth of information on the whole family. Often there are depositions from family members, as well as contact information.

Family correspondence

Tax rolls may be used to estimate death from absence of name from tax list after certain date and substitution of widow's or heirs' names thereafter for same property.

Census records can estimate time of death to within 10 years if family is found in census following death, and often to 5 years if you search state census records as well.

Genealogies, family histories, or family association periodicals This is the most suspect of sources; use only as a guide for further research unless actual documentation is included.

LDS Family History Centers - IGI and Social Security Index

Marriage Documentation Sources

Marriage license or record in state office or at county courthouse.*

Church records may include banns, anannouncement of intention to marry but may have been given only orally and never recorded.*

Marriage bonds show agreement by groom or someone acting for him and by male representative of a bride that there was no impediment to marriage.. You might find these among official country records.

Justice of peace records

Family Bible records*

County or local histories*

Newspaper articles of marriage announcements, anniversaries as well as obituaries. Always include paper name, page and publication date.

Printed vital statistics*

Pension papers for war service. Wife sometimes had to prove marriage before or after certain date in order to receive pension. Many records include family information, even when the pensioner outlived the spouse.

Census records (1880) usually gives relationship to head of household, such as "wife"; 1900 census tells same and also how long individuals were married.

City directories sometimes tell relationship of household members but more often wife is not mentioned (unless she had a business of her own.) until after husband's death when she is listed as the widow .

Deeds, probate files etc. listing husband and wife

Family correspondence

Gravestones*

Mortuary records*

Homestead application papers may list family members and relationship. For a copy write Director of General Records Division, Washington National Records Center, Suitland, MD 20409, but must have specific information as to location of claim or date filed.

Birth certificate of child

Genealogies*

Photographs might give dates on the back.

Immigration Records will often give family relationships on ship lists.

Naturalization Records include maiden names of wives, names of husbands and lists of all living children as part of all naturalization records after 1906 and some records from before.

* See comments under death sources

Birth Documentation Sources

Birth certificates from state office or county official.*

Obituaries are often wrong on birth date and place so back up this source .

Church records include baptisms and christenings.

Family Bible records*

County or local histories*

Newspaper listing*

Cemetery records*

Pension papers for war service may list children with birth dates and more rarely wife's date of birth..

Printed vital statistics*

Town clerk's records

Lodge/ Fraternal records. Often members were congratulated on the record for the birth of a child

School records may be found in local historical societies.

Family correspondence

Census records may approximate date only. If born within census year, age in months may be given; for some years month and year of birth were given.

Naturalzation records *

Voters' registrations. Check with county election departments for the location of these records.

Genealogies* .

Photographs . Check for dates and inscriptions on the photographs or in the book where they are mounted in. You might also find a list in an old box of photographs.

Employment Records

Oral Histories

*See comments under death or marriage sources.

ORGANIZING YOUR WORK

There are many methods of organizing the paper pile. Each person needs to find the method that best fits his or her own family tree. If you are using a computer, you will be able to print out your Family Group Sheets and Pedigree charts, but you will still need to file your documentation information and certain other data in paper files. If you will not be using a computer, this organization will be even more vital if you want to find even the simplest family group sheet.

Following are some methods you might consider to help you organize:

★ Use a file cabinet or a file box to store your data.

- Set up a main file (or work file) for every surname you are researching.
  - File correspondence and other bits and pieces of information that don't yet quite fit in with the family file.
- Behind each surname file have a file for each direct ancestor with that surname.
  - File all the original documents for that individual.
  - If you are not using a computer, you will need to keep copies of other information about that individual.
  - You might want another file for collateral relative information, depending on how much you have. You can also keep that information in the file of that person's parent, if you have room.

★ Use binders for each of your surnames to collect bits and pieces of relevant information. This method offers the advantage of easily grabbing a complete Surname binder as you head to the library to work on that name.

- Number documents as you insert them.
- Keep a table of contents in the front of the binder. Record the numbers on your family group sheets or as sources in the computer.
- Use tabs within the binders like you would on the file folders, dividing into generation, or localities, or whatever makes the most sense for the number of people and amount of information that you have.

★ An alternative is to keep one main documentation binder for all your research. Here diligent recording on family group sheets and in the computer becomes even more important.

★ Your photo album can also be organized like a pedigree chart.

★ Organize your file cabinet (or binders) by locality keeping records together for each area you research rather than by family.

★ Organize by record type, keeping birth, land, census records and the like in separate files or binders

No one method is better than another. How you organize your data is not important. What is important is that you know where to find what you want when you want it. You also need a good record of what you have done, so that you do not waste time duplicating work you have already done. A combination of the various filing methods works best for most people.

Recording Your Genealogy in the Computer

If you ask around among some serious amateur genealogists about how much room they need for their hobby, you will hear horror stories of cribs piled with papers, boxes to the ceiling, a guest room that is unavailable to guests. Organization can eliminate much of the clutter and help you avoid duplication of records. If you have any access to a computer, it is highly recommend you use it and eliminate as much of the paper pileup as you can.

There are many computer programs on the market today, especially for PC users. Each has its good points and its deficiencies. Some programs allow you to attach notes and sources directly to an event. New events will sort according to time allowing the printed story (the notes) to always be chronological. Other programs allow direct access to the many research CDs that are now on the market. Some of the newest entries into the market as well as many of the older ones can be downloaded directly from the Internet in trial versions. It is recommended that you check around and find one that fits your needs and computer skills.

There are not as many programs available for the Macintosh computer. It is important to note that to date the only way to read the many Broderbund CDs that have come out is to purchase the MAC version of Family Treemaker, or have Virtual PC or its equivalent on your MAC. Hopefully this will be addressed in the future. PC users can simply install a viewer for the CDs. Some of the other CDs at this time are totally inaccessible to the MAC. Therefore, if you are buying your first computer, it is reluctantly recommended that it be IBM compatible.

Only one feature is an absolute necessity in any genealogy software program you buy. It must be GEDCOM compatible. If it isn't, send it back! GEDCOM is a data standard used for transferring information from one program to another. This is something you want to do with great care, as it can play serious havoc with your notes and unusual events. GEDCOM also allows you to share your family file with others who might be using a different program. The standard allows sharing between Macintosh and IBM compatible computers. Many genealogists who started out on an Apple IIEs and its cousins - and therefore had to start all over when they got a PC – learned just how vitally important it is to have GEDCOM.

Once you start adding the information into the computer, you can eliminate a lot of paper, but you will still have things you will need to and/or want to keep.

Be sure to organize your computer files well. You will probably have only one major genealogy file, although as your data grows you might wish to break your computer files into major families. Or, you might have multiple text files and graphic files.

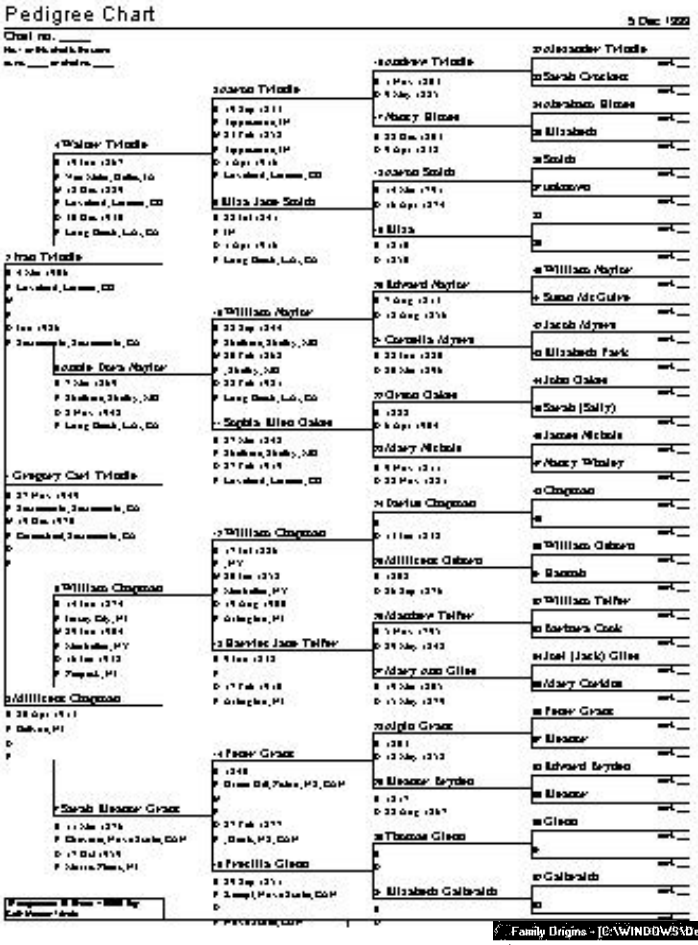
Set up files as you do for your paper files and keep organized. **Be sure to back up your files**. Keep backups safely away from the computer and recopy often to avoid media failure.

The best policy is to SHARE. If you have given a copy of your GEDCOM, shared copies of documents, tapes, etc., with a cousin, you know where to find them if something happens to your copies. And you just might find that the cousin has some wonderful things to share in return.

Basic Genealogical Forms

Whether you are working on paper or on the computer, the basic information that you should be collecting and recording is the same. The next few pages show some sample forms and computer screens. The goal is to complete all the information.

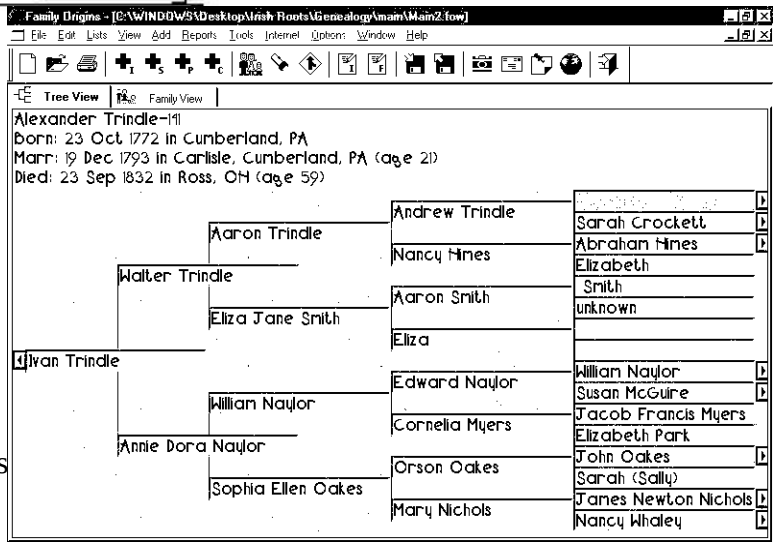
Pedigree Chart



The first basic form is the pedigree chart. These come in many shapes and forms, but all are basically a chart showing all of the direct ancestors (parents, grandparents, great-grandparents, etc.) of a person.

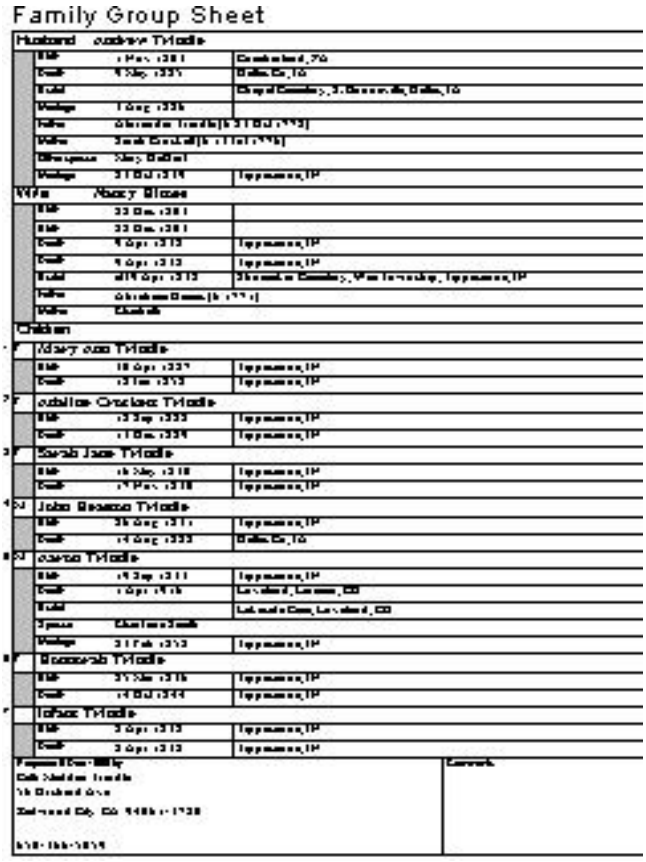
Paper forms usually have room for 4 to 6 generations. You fill in name, birth date and place, marriage date and place and death day and place for each ancestor. Some charts have room for burial place as well. The chart at the left is one that is printed from a computer program, but it is the same as those you would fill in on paper. Note that there is a place to write in another chart number after each person in the last column. This would be the chart number for the next generations in this line. Hopefully you will need these lines, but it will take a little time.

This is a typical pedigree screen from a computer program. You will not usually find all the vital information on the screen. Note in this case the information of the person who is highlighted is at the top of the screen. You can easily move to the next generations with a few mouse clicks. In the case of computer programs the information is more likely to be entered in the family



creen. *See the next page*

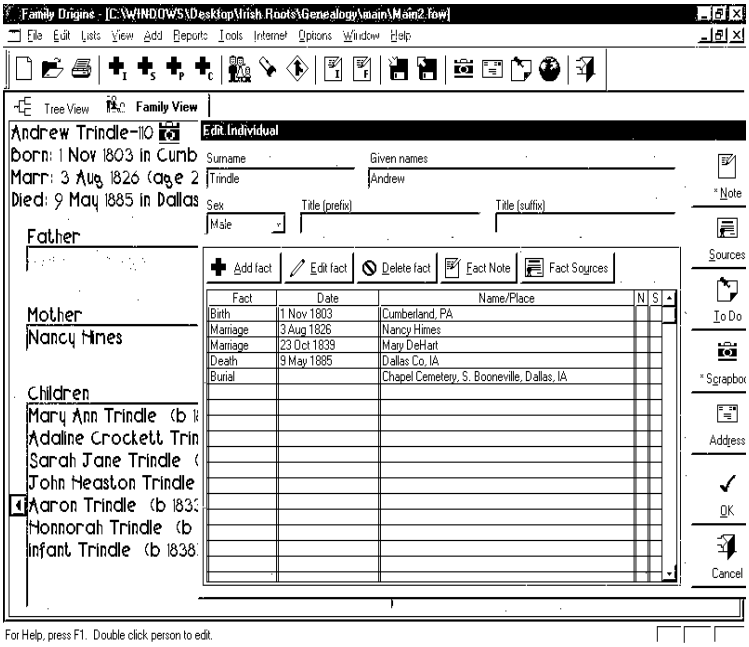
Family Group Sheet


Family Group Sheet

Each direct ancestor (parent, grandparent, great-grandparent) should have a completed family group sheet. These sheets list the husband, wife and all the children of a family. Their birth date and place, christening date and place, death date and place and marriage date and place are listed along with known spouses of the children. If an ancestor was married more than once, you would need a family group sheet for each marriage.

Computer family entry screens will be at least similar to the family group sheet. Husband and wife are generally listed at the top and their information may or may not be displayed. If it is not, generally double clicking on the name will bring up another screen where you enter the information. The advantage with computers is that you can usually add more information than on the standard family group sheet. Census information, land purchases, military records can all be grouped in one place.

If you are using paper rather than a computer, you should complete an individual form for those for whom you wish to gather more than the basic information. A blank pedigree chart, family group sheet and individual information form can be found at the end of this section. Feel free to copy these sheets. Even if you use a computer, they can be used to send off to family members asking for more information.



Family Entry Screen from Family Origins 8.0

Note the screen here shows check boxes for notes and sources. In this and most computer programs, these boxes will automatically fill in as you add sources and notes to your files. (For more on sources, see Documentation.)

There are many other forms that can be helpful in your research. We have included some forms at the end of each section that will help you get started. You can find other forms for sale in our library. Many of the "how to" books in the library will also include some sample charts.

.The Importance of

Documentation

This is the area that separates the good genealogist from the sloppy one. It is very important to document all of your sources, including not only the title, author, publisher, copyright date and page number, but also the edition and repository where you found the source. It is a lot easier to recheck a source if you know where it can be found. It helps to make a photocopy of the backside of the title page. This usually gives all the information except the page and repository. Keep the page attached to any other photocopies you make.

CDs have presented a new documentation challenge. Many are digital representations of books and at times vital record registers. Not only do you need to document the title, publisher, etc., of the CD but also of the original source. Online information is more difficult yet. Often lists have been uploaded to sites with insufficient information, and the sites often disappear before you can recheck the facts. If you use these sources, complete as much information as possible, and if you are not able to discern the original source, ask. If you do not have original sources, be sure you note that it is an undocumented source.

This leads to a really short definition of Primary, Secondary and Questionable information.

- ★ Primary information is that recorded at the time of an event by someone who would be likely to have the correct information. Therefore, a birth certificate is considered primary if it is filed close to the time of birth.

- ★ Secondary sources are those that are recorded some time after the fact. A delayed birth certificate, filed perhaps when someone needed to get a social security number, is considered secondary as the originator knows the facts only by word of mouth, or too much time has passed to believe they might not make a mistake. A letter written at the time of a birth might be considered primary if it is written by someone present at the birth, but secondary if it is written by someone else. Compilations of original records and indexes to the same are considered secondary, as another step has been added where a mistake might have been made.

- ★ Information that comes from interviews, census, etc. is generally considered questionable. But that needs to be clarified. The census is a primary source for pinpointing a family's existence in a certain place at a certain time, but it is a questionable source of information for age, etc. Keep in mind that often one person in a household provided the information for the complete household, even in the case of unrelated person such as a lodger. In some cases, the information may have been provided by a landlord, a neighbor, or perhaps even the census taker himself.

- ★ At the very bottom of the list is Unreliable information. This includes "ALL" information that does not give you a source. Unfortunately this includes the LDS Ancestral File, Family Tree Maker's World Family Tree and any other family files that do not have source

information included with them. A contact is often listed, but often it is not possible to contact the originator. If you can, you might be able to turn this into primary or secondary information. At the very least you can use it as a starting point to seek more reliable information, so don't dismiss it out of hand.

One other concept you should be aware of is Preponderance of Evidence. When there is no direct source of a fact, other information can often be conclusive enough to prove a fact. So even if the birth certificate for your grandmother was never filed, if her father's will lists her as a daughter and you can connect her with the will proving she is the daughter named, then that would be a legitimate source for her parentage.

Many computer programs have built in source handling tools. Some are fully functional bibliography tools, others somewhat less functional but still useful. You can usually connect a source to multiple people, and many have an area to record the repository and call number.

If you are not using a computer, you might consider setting up an alphabetical listing of sources. A card catalog is usually the easiest method, as you can keep it truly alphabetical, but a binder with alphabetical sections would still be relatively easy to use. Of course, you can just keep a running list of sources as you consult them, but it can become a bit unwieldy if you do any extensive research.

In the forms section you will find a research calendar. This is helpful whether you use a computer or not. If you fill in the calendar as you go, and also keep title pages, at least until you enter them in the computer. You should never have to retrace your steps due to inadequate documentation.

You should indicate the source of your information on your family group sheets. Remember, if you send this information to another researcher, they will want to know where the information came from.

Don't forget that individuals are sources. It is just as important to record the source of memories and stories as that of a vital record. Put the full name of the person and information about when and how the information was passed on to you. For example, you might list remembrances in a letter dated 1/1/2000 or reminiscences at a family gathering on 12/25/1999.

Every genealogist should read the book **Evidence Citation & Analysis for the Family Historian** by Elizabeth Shown Mills, Genealogical Publishing 1997, before going too far. It is available in the SMCGS Library. Consider adding it to your personal library as one of the backbones of a small home genealogical library. If you follow the guidelines, you will never go wrong, and you should never have to retrace your steps if you also keep your files organized.

Individual

&

Family

Forms

- ★ Individual Records Checklist
- ★ Family Group Sheet
- ★ Pedigree Chart
- ★ Ahnentafel Chart
- ★ Surname Sheet
- ★ Oral Interviews
- ★ Family Traditions

The Forms on the following pages are some of the basics and some favorites for recording family information

- ★ The Individual Records Checklist can be used to record all the information gathered on a particular person.
- ★ The Family Group Sheet is used to record information on one particular marriage and its children.
- ★ The Pedigree Chart is used to record all known direct ancestors of a particular person. Charts can be linked to record further generations.
- ★ The Ahnentafel Chart is similar to a pedigree. It also records the direct ancestors of an individual.
- ★ The Surname Sheet is used to record all the information found on direct ancestors with a certain surname. It is particularly useful in a research binder, with one for each surname you research. *See a sample in part 2.*
- ★ The Oral Interview Check Sheet can help you are prepare for an oral interview.
- ★ The Family Traditions form is helpful in evaluating family stories and traditions. Traditions are those stories that have been passed down through the years, but have no concrete proof of truth. Tracking down the truth or fallacy of a tradition can often lead you to a great deal of information on your ancestor.

Individual's Record Checklist

Name:

Birth:

Death:

Vital Records (actual record or another source)			
1	Birth		
2	Christening		
3	Marriage		
4	Death		
5	Cemetery/Sexton		
6	Mortuary/Coroner		
7	Adoption/ Orphanage		
8	Divorce		
9	Family History Center IGI		
1			
Census, etc.			
1	Federal- Full Census		
2	Federal - Soundex		
3	State		
4	Special Indexes		
5			
Land & Property			
1	Deed Indexes		
2	Land Grants/ Land Entry		
3	Surveys/ Plat Maps etc		
4	Mortgages/ Leases etc		
5	Tax Lists		
6	Tax & Assessment Records		
7	Voter Registration		
Probate Records			
1	Wills / Administrations		
2	Inventories /Orphans Court		
3	Petitions		
4	Social Security Death Index		
5	Obituaries		
6			

Court Records			
1	Civil Court		
2	Criminal		
3			
Military Records			
1	Service Files		
2	Pension Files		
3	Bounty Land Records		
4	FHC Military Index		
5			
Emigration Immigration & Naturalization			
1	Passenger & Ships Lists		
2	Intentions		
3	Declarations		
4	Oaths etc		
5			
Published and Other Sources			
1	Church Memberships etc		
2	County & Local Histories		
3	Genealogies in Print		
4	FHC Ancestral File		
5	School Records		
6	Job Records		
7	Fraternial Societies		
8	Newspaper clippings		
9	SAR/DAR records etc		
Home Sources			
1	letters/ Diaries/Journals		
2	Bible/Book of Remembrance		
3	Photographs		
4	School Records		

Family Group Sheet date_____

Husband:		Occupation:
Born:	Place:	source:
Christened:	Place:	
Married:	Place:	
Died:	Place:	
Buried:	Place:	
	Place:	
	Place:	
Father	Mother:	
Other Wives		

Wife:		Occupation:
Born:	Place:	Source
Christened:	Place:	
Married:	Place:	
Died:	Place:	
Buried:	Place:	
	Place:	
	Place:	
Father	Mother:	
Other Husbands		

	CHILDREN	SE	BORN	PLACE	MARRIED /SPOUSE
1					
	Sources				
2					
	Sources				
3					
	Sources				
4					
	Sources				
5					
	Sources				
6					
	Sources				

See back for additional family and documentation

7					
	Sources				
8					
	Sources				
9					
	Sources				
10					
	Sources				
11					
	Sources				
12					
	Sources				

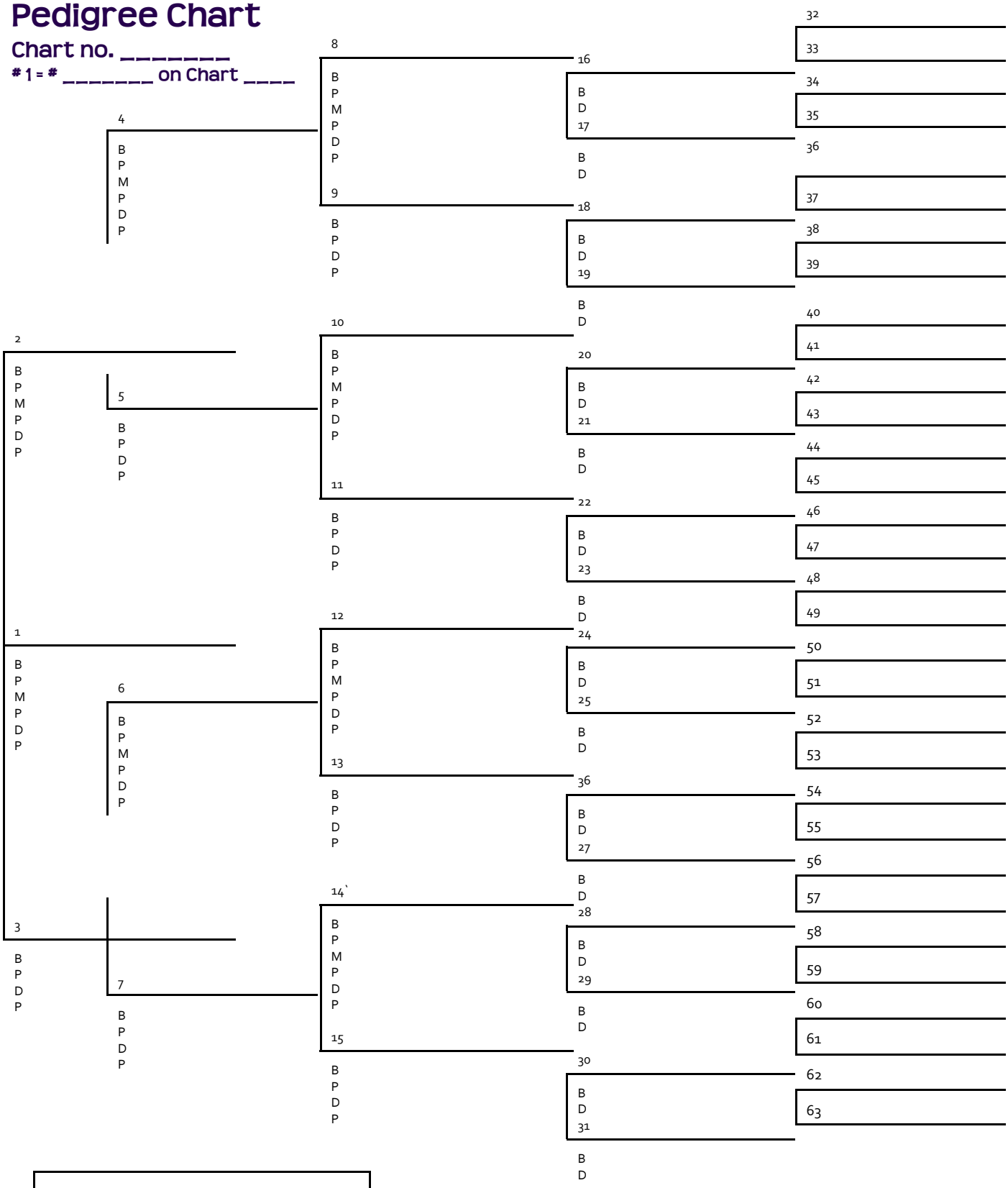
Other Notes

Prepared by

Pedigree Chart

Chart no. _____

 # 1 = # _____ on Chart _____



Prepared By
Date

Chart Continuation

Family of #	is continued on Chart #
32	
33	
34	
35	
36	
37	
38	
39	
40	
41	
42	
43	
44	
45	
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57	
58	
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60	
61	
62	
63	

Notes And Documentation

AHNENTAFEL CHART

	Name	Birth Date/Place	Marriage Date/Place	Death Date/Place
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				

	Document	Source

1b		
1m		
1d		
2b		
2m		
2d		
3b		
3d		
4b		
4m		
4d		
5b		
5d		
6b		
6m		
6d		
7b		
7d		
8b		
8m		
8d		
9b		
9d		
10		
10		
10		
11		
11		
12		
12		
12		
13		
13		
14		
14		
14		
15		
15		

Surname Sheet

Soundex Code _____

Given Name	Birth Date/Place	Death Date/Place	Vital Records	Census	Other			Spouse

Vital Records B=birth, C=Christening/baptism, M=marriage, D=Death
Census: Starting with first US National Census after birth year - (-) for missing years (x) if have re cords. Notation for foreign or state census on 2nd line
Other: C=cemetery, M=military, O=Obituary, L=land P=picture, W=probate, S=school, ℞=medical, N=naturalization, B=biography, F=Family tree, H=honors, ✂=newsclipping

FAMILY RECORDS: Origin ___ Name Meaning ___ Crest ___ Arms ___ Motto ___

Researchers	Bibliographic Sources - major	Submissions

Other Notes:

Oral Interview Check Sheet

1. **Be familiar with the background of the person you are interviewing.**
2. **Prepare an interviewee agreement similar to that listed below. Change it to reflect how you hope to use the information you gather**

I _____ agree that _____ may record my interview and include the information obtained in the _____ Family history. I will be provided with a transcription of the interview and have the opportunity to make corrections to the same before it is published in any form.

I assign the rights in conjunction with this interview to the interviewer listed below.

_____ Interviewer

_____ Interviewee (signature)

_____ Date

3. **Gather your equipment. If you are taping, be sure you have extra batteries and tapes and any other equipment needed. Be familiar with their use. During the interview is not the time to learn how to load film or tape or turn on a flash.**
    1. **Do you want to add a picture? Don't forget your camera, flash and film.**
    2. **If you plan to video tape, be sure to add that information to the permission form.**
4. **Prepare a list of questions to get the interview going. Gear the questions to the information you are hoping to obtain, but remember that you want to put the interviewee at ease. If your goal is just to hear whatever family stories they might have to tell, use some standard questions to get started.** ***(See the back for sample questions)***
5. **After the interview is complete prepare a summary sheet to attach to the transcription. The summary should include Interviewer's Name and contact information, Interviewee's name, age and contact information, date and place of the interview, major topics covered and whether you have documents or pictures to attach.**

Sample interview questions

1. What were you doing on Dec 7, 1941?
2. Do you remember your grandparents? What is your favorite memory of them?
3. What chores did you do as a child?
4. What was your favorite toy? Game?
5. How did you meet your spouse?
6. What is your favorite holiday tradition?
7. What inventions in your lifetime do you most appreciate?
8. What is your favorite book?
9. Who was your favorite teacher? Why?
10. Do you remember your first date?
11. What's your favorite memory of your father? Mother? Sister? Brother?
12. How did you celebrate your birthday as a child?
13. Of all the places you have lived, what was your favorite?
14.
15.
16.
17.
18.
19.
20.

Add your own questions

Don't forget to make copies of all tapes and transcriptions.

Family Tradition Evaluation

Short Synopsis of Tradition:

Surname:	
Place:	Time:
Source	
Relationship:	Doc #:

Steps to take to prove or disprove this tradition.

	research to undertake...list sources	**done(x)**
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

What have you found of genealogical value-----what further research does it lead to (use a RESEARCH PLAN form to detail)?

Notes

Part 2

Your Research Binder

Your Research Binder

The San Francisco Bay Area is a wonderland for the genealogical researcher. There are multiple libraries devoted to genealogy, numerous Family History Centers, many local historical societies for those whose ancestors came from this area and the local branch of the National Archives. In order to make the most of your opportunities, take the time to organize ahead of time.

Look over the forms that follow this section and use them to list your research goals for each repository visit.

Keep in mind that most of the major facilities do not allow you to take bags and purses into the facility. This is true locally of both Sutro library and the National Archives. Both provide lockers for your use. You deposit a quarter at the time you lock it, but the quarter is returned when you retrieve your items. Although this is a necessary security measure for the facility, it works to your advantage as well, for it permits you to roam about these facilities freely without having to worry about the security of your own valuables.

Having all your material contained in one three-ring binder makes it much easier to carry and use your records. Like your filing system, your research binder should fit your particular needs. Following are some suggestions you may wish to consider when setting up your own.

★ A zip pouch in your binder which might contain:

- Change for making copies. Some facilities sell key cards for the copier. These can be kept in the pouch as well. Be sure to mark which repository it is for if you haven't used it up.
- Pencils. Many facilities do not allow the use of pens.
- A magnifying glass can often come in handy.

★ Sections for each research facility you might visit in the area, with the following:

- A map of the collection if one is available
- A list of books, periodicals, films and fiche you hope to use. Use a research log with the Titles filled in and fill in the other information as you use the material. (There is a blank research log in the forms section)
- Blank copies of forms that would be helpful at a particular facility.

★ Check out the SMCGS "Research at the National Archives" for a full range of census and military records abstraction forms.

★ See the forms section for vital records abstraction forms. If you are planning specialized research (i.e. Irish), check for forms that might fit your research goals.

★ Specialized extraction forms for library research. (See the forms section)

★ The Surname section.

★ Alphabetical Dividers One page per ancestral surname where you record the soundex

code, all ancestors with that surname with indications of what information you already have, major sources of information on the surname, others researching the family, and whether you have the basic surname history. For a sample of the sheet see the next page. There is a blank one in the Family Forms section.

★ A Pedigree chart - Use a folded 15 generation chart instead of multiple 6 generation pages if you have extended generations. Use pencil if the information you have is not fully documented (it might change). Make your pedigree chart especially helpful by adding symbols for records you have collected and information you already have, such as a flag for military records or a tombstone for cemetery records.

Even if you take a computer along, a well organized binder gives a quick overview of any surname you are researching. It can give you a one page view of any family and is helpful when you exchange information with others..

A note on using computers: Many facilities are providing plugs for lap top use, but you can't depend on it. Until you know the set up, you may want to have a second battery with you, and be really familiar with using the sleep mode of your computer. Be sure to have a lock if you intend to leave the computer and go through the stacks. Keep in mind that the ban on bags includes your computer bag, so plan ahead how you will manage the computer, your cord, your lock and your binder when in the facility. Bear in mind that you need to sign in as you enter the facility. Being prepared can make the process a little easier. Large, clear plastic bags are good for holding a computer cord, your extra battery, a lock and other small items. Place this on top of your computer, which rests on top of your binder, and you probably will be able to carry it all without dropping anything.

The following pages list some of the Bay Area genealogical and historical repositories. While hours are listed in most cases, it is still best to call ahead to be sure the hours haven't changed.

Surname Sheet

Soundex Code_____

Given Name	Birth Date/Place	Death Date/Place	Vital Records	Census	Other			Spouse

Vital Records B=birth, C=Christening/baptism, M=marriage, D=Death
Census: Starting with first US National Census after birth year - (-) for missing years (x) if have re cords. Notation for foreign or state census on 2nd line
Other: C=cemetery, M=military, O=Obituary, L=land P=picture, W=probate, S=school, ℞=medical, N=naturalization, B=biography, F=Family tree, H=honors, ✂=newsclipping

FAMILY RECORDS: Origin ___ Name Meaning ___ Crest ___ Arms ___ Motto ___

Researchers	Bibliographic Sources - major	Submissions

Other Notes:

research forms

- ★ Research Calendar - List of sources to check for and those you have used on one research trip.
- ★ Research Plan - for tackling a research problem
- ★ Research Extraction - Copy information from a source or attach to a photocopy with source information
- ★ Research Inventory - listing of research done for an individual
- ★ Research Requisition - for use at Family History Libraries
- ★ Vital Record Extraction Forms
    - Death Record Extraction
    - Marriage Record Extraction
    - Birth Record Extraction
    - Probate Record Extraction
    - City directory Extraction

Research Calendar - Facility _____ Date_____

Title	Author	Publisher	©Date	Found Info ?	Ancestor	To file
Title	Author	Publisher	©Date	Found Info ?	Ancestor	To file

Research Calendar - Facility _____ Date_____

Title	Author	Publisher	©Date	Found Info ?	Ancestor	To file
Title	Author	Publisher	©Date	Found Info ?	Ancestor	To file

Research Plan

Ancestor _____

Definition of Problem

Sources to Consult

Source	Place	Call #	Date researched	results N none Y see next col.	document # research extract or copy

Source	Place	Call #	Date researched	results N none found Y see next col.	document # / research extract or copy

Notes

Research Extract

Date

Library/ Repository
Call #
Title/ Description
Author
Condition
Surnames
Time Period
Indexed

Research Extract

Date

Library/ Repository
Call #
Title/ Description
Author
Condition
Surnames
Time Period
Indexed

Research Inventory of _____

Surname_____

Date	Place of Search/ Addressee	Summary of Information Found	Date of Reply	Document #

Birth/Christening Register Extract

	DATE	RESEARCHER
	DATE	RESEARCHER

DESCRIPTION OF SOURCE

DESCRIPTION OF SOURCE

INDEXED	CONDITION	TIME PERIOD
INDEXED	CONDITION	TIME PERIOD

SEARCH OBJECTIVE

SEARCH OBJECTIVE

Page/ Entry	Date √Born ◊Christened	Child's Name	Father's Name Mother's Name	Residence Occupation & Other Misc	Sponsors

NOTES

Marriage Register Extract

	DATE	RESEARCHER

DESCRIPTION OF SOURCE

INDEXED	CONDITION	TIME PERIOD

SEARCH OBJECTIVE

Page/ Entry	Date	Groom / Bride	Description	Parents	Witnesses

NOTES

Death
Register Extract

Page/ Entry	Death/burial Date & Place	Name	Description (Age,occupation Etc.)	Relationships

NOTES

Researcher:
Date:
Place:
Title:
Author:
Call #:

Probate Extract

Country _____
State _____ County _____

☐ Will ☐ Administration

☐ Other _____

	DATE	RESEARCHER
PLACE		CONDITION
CITY		
YEARS/ CALL #`		

Book _____
Page_____
Date
Recorded_____

☐ will extract attached

☐Orphans Court/ Guardianship
Courthouse: _____

Deceased: _____

Residence of deceased:_____

Heirs: _____
_____
_____
_____

Administrators: _____
_____

Date Brought to court: _____

Description of Property ☐Inventory attached

_____
_____
_____
_____

Other _____
_____
_____

CITY

DIRECTORY EXTRACT

Year/ Page	Name	Occupation	Business Address	Home Address

NOTES

The other person is the ..... of the common ancestor

Relationship Chart

You are the ..... of the common ancestor

Common Ancestor	Son	Grand-son	GG Son	2GG Son	3GG Son	4GG Son	5GG Son	6GG Son	7GG Son	8GG Son	9GG Son	10GG Son

Son	Brother	Nep	Grand Nep	GG Nep	2GG Nep	3GG Nep	4GG Nep	5GG Nep	6GG Nep	7GG Nep	8GG Nep	9GG Nep
Grandson	Nep	1 C	1C1R	1C2R	1C3R	1C4R	1C5R	1C6R	1C7R	1C8R	1C9R	1C10R
GG SON	G Nep	1C1R	2C	2C1R	2C2R	2C3R	2C4R	2C5R	2C6R	2C7R	2C8R	2C9R
2GG SON	GG Nep	1C2R	2C1R	3C	3C1R	3C2R	3C3R	3C4R	3C5R	3C6R	3C7R	3C8R
3 GGSON	2GG Nep	1C3R	2C2R	3C1R	4C	4C1R	4C2R	4C3R	4C4R	4C5R	4C6R	4C7R
4GG SON	3GG Nep	1C4R	2C3R	3C2R	4C1R	5C	5C1R	5C2R	5C3R	5C4R	5C5R	5C6R
5GG SON	4GG Nep	1C5R	2C4R	3C3R	4C2R	5C1R	6C	6C1R	6C2R	6C3R	6C4R	6C5R
6GG SON	5GG Nep	1C6R	2C5R	3C4R	4C3R	5C2R	6C1R	7C	7C1R	7C2R	7C3R	7C4R
7GG SON	6GG Nep	1C7R	2C6R	3C5R	4C4R	5C3R	6C2R	7C1R	8C	8C1R	8C2R	8C3R
8GG SON	7GG Nep	1C8R	2C7R	3C6R	4C5R	5C4R	6C3R	7C2R	8C1R	9C	9C1R	9C2R
9GG SON	8GG Nep	1C9R	2C8R	3C7R	4C6R	5C5R	6C4R	7C3R	8C2R	9C1R	10C	10C1R
10 GG SON	9GG Nep	1C10R	2C9R	3C8R	4C7R	5C6R	6C5R	7C4R	8C3R	9C2R	10C1R	11C

To use this chart:

1. last common ancestor is the blank square
2. move the correct number of generations from that ancestor across chart for the first person
3. move the correct number of generations from that ancestors down chart for the second person
4. The correct relationship will be the intersecting square of those two lines.

Some Common Abbreviations Used in this and other relationship charts

C	Cousin	Bro	Brother or Sister
G Son	Grandson or Granddaughter	U	Uncle or Aunt
GG Son	Great Grandson or daughter	GU	Grand Uncle or Aunt
Nep	Nephew or Niece	R	generations removed
G Nep	Grand Nephew or Niece	CiL	Cousin in Law
GG Nep	Great Grand Nephew or Niece		
Son	Son or Daughter		

Scoping the Generations

Generation	Persons	Number of Direct Ancestors		Birth ☼
		In Generation	Total	Year
1st	**You**	**1**	**1**	**1930**
2nd	**Your Parents**	**2**	**3**	**1900**
3rd	**Your Grandparents**	**4**	**7**	**1870**
4th	**1st Great Grandparents**	**8**	**15**	**1840**
5th	**2nd Great Grandparents**	**16**	**31**	**1810**
6th	**3rd Great Grandparents**	**32**	**63**	**1780**
7th	**4th Great Grandparents**	**64**	**127**	**1750**
8th	**5th Great Grandparents**	**128**	**255**	**1720**
9th	**6th Great Grandparents**	**256**	**511**	**1690**
10th	**7th Great Grandparents**	**512**	**1023**	**1660**
11th	**8th Great Grandparents**	**1024**	**2047**	**1630**
12th	**9th Great Grandparents**	**2048**	**4055**	**1600**
13th	**10th Great Grandparents**	**4056**	**8191**	**1570**
14th	**12th Great Grandparents**	**8192**	**16383**	**1540**

☼Assumes an average age of 30 for each direct ancestor when the next direct ancestor was born