Develop your research plan

The first step in family history research is to be clear about what you’re doing. What do you want to find out about your family? Are you just curious, or is there something specific you want to know? Is there a particular ancestor you want to find out about?

Why do you want to know more about your family history? Perhaps you want to:

- know more about your ancestors and where they came from
- create a family tree
- have a family reunion
- write about your life story or that of a family member
- connect with your community, culture and country
- find a family member
- confirm your Aboriginality
- make a native title, land rights, compensation or repatriation claim.

Being clear about what you want to find out, and why, will help you work out the best approach. It might be as simple as getting a copy of your Nan’s birth certificate or it might involve in-depth research in historical archives.

Every journey is different

Every research journey is different, but it’s a good idea to focus on one research area at a time. For example:

- a specific family group – your mother’s father’s people
- one surname or family line – the Edwards family
- a question you want to answer – who were your mother’s parents?
- A specific person – grandfather John Edwards who lived in Tennant Creek, NT in the 1920s.

Even if you want to know everything about everybody, break up your research into bite-sized pieces. For example, if you want to create a complete family tree for your children, the best way to do this is to focus on one branch at a time working your way back from yourself.
Use the Toolkit Research Plan worksheet to help you organise your research journey.

What’s in a research plan?

Aim: What do you want to know?

- Clearly define the aim of your research. It can help to put this in the form of a question – What is the story of my mother’s side of the family? Where were her parents from? What were their lives like?

Known facts: What do you already know, or what have you learned from previous research?

- Write down what you know and what records you’ve already searched, if any.
- Use concise statements or dot points to summarise this information. For example: My mother’s birth certificate says she was born in Dubbo, NSW. Her name at birth was ‘Susanne Smith’. Her mother’s name was ‘Mary Smith’ and Mary was 16 at the time of Susanne’s birth. Susanne’s father’s name is not on the birth certificate.

Possible sources: Where could you find out what you want to know?

- Identify records and other sources that might have the information you need. You might look for a marriage certificate or find out about how to access divorce papers. You might ask other family members. Bear in mind that you could be asking sensitive questions that may cause distress.
- Your possible sources will depend on the time period and location you are researching. For example, if your mother was born on a mission or managed reserve, there may be church and/or government records.
- You will need to become familiar with the range of family history sources and decide which ones are most likely to have the information you are seeking.

Tracking down the information: How will you find the sources you want?

- Make a list of sources starting with the ones most likely to answer your research question and/or the ones that are the easiest to get.
- Note where to find them – are they online? Can you get them from a local library or historical society? Can you ask for copies to be sent to you, or do you have to visit an archive?
- Write down your goal for each source.
- Work through the sources one-by-one and write down what you find out.
- Make a note of clues and random ideas for future research.
Reviewing your findings

It's important to step back from time to time and check how your research is going.

- Have you found what you wanted to know?
- What have you learned from the information you've found?
- Were you surprised at what you haven't found? What did you learn from this? Are there other places you might be able to find what you want to know?

If you get stuck

- Ask for help. Record holders, librarians, archivists, historians and genealogists are very good sources for advice on types of records and how to locate them.
- Discuss what you have found and what you can't find with friends or others who are researching their own families. They might be able to give you some new ideas.
- Choose a different research direction and follow this new trail.
- Go back to your notes and follow up some of your more 'outside of the square' ideas. These may or may not lead you to more information.
- Do some more background reading. Reading other people's family histories may give you some fresh ideas. Always check if any new family or community histories have been published, or any recent books or journal articles relating to places that are important for your family's history.
- Sometimes you need to come back to a problem later after you've checked other sources.
- Unfortunately, you might have to accept that you'll never know the answer to a particular question.