

# Solving Tough Research Problems

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**Persistence, innovation, and thoroughness are rewarded.**

- I. Unproductive vs. Helpful Attitudes (Whether you think you can, or think you cannot, you are right!)
  - A. Recycling vs. Research.<sup>1</sup> (For really tough problems, you have to learn to dig deeper!)
  - B. Look-'em-up vs. Track-'em-down.<sup>2</sup> (RELENTLESSLY pursue and analyze all sources!)
  - C. I've tried everything vs. I've thoroughly tried every technique and strategy on the following checklist for this ancestor, his kin, his neighbors, and his associates. I've looked in every jurisdiction of every place each lived, and in the surrounding counties. I've viewed every kind of document and used every kind of repository at every level. I'm still trying to think of new ways to track down the answer to this research question. Got any more ideas?
  - D. A Few Common Causes of Really Tough Problems
    1. Unproductive attitude. *Solution:* Develop a relentless "track >em down" attitude.<sup>3</sup>
    2. Poor research logs. *Solution:* Partially fill out logs BEFORE looking at each source. This includes each search's goal (person and event you seek to document).<sup>4</sup>
    3. Inadequate research documentation. *Solution:* Document and organize AS YOU GO.
    4. Stagnant thinking on the problem. *Solution:* Correlate what you have found. Use new forms to pull out new patterns and force your brain to try something different.<sup>5</sup>
    5. Failure to put an ancestor in a community context.<sup>6</sup> *Solution:* Trap the answer to the question in a web of associates and neighbors on both sides of the county line.<sup>7</sup>
    6. Arbitrary research strategies. *Solution:* Thoughtfully plan how, who, what, when, and where you will do the research to solve the problem. Be flexible if a new find takes you in a new direction.<sup>8</sup>

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<sup>1</sup> Elizabeth Shown Mills, "Dissecting the Research Problem" (lecture presented in Course 4 Advanced Methodology & Evidence, Institute for Genealogical and Historical Research at Samford University, Birmingham, Ala., 17 June 2005).

<sup>2</sup> Elizabeth Shown Mills, "Genealogical Mindset & Principles of Scholarship" (lecture in Course 4 Advanced Methodology & Evidence, Institute for Genealogical and Historical Research at Samford University, Birmingham, Ala., 13 June 2005).

<sup>3</sup> Ibid.

<sup>4</sup> G. David Dilts, "Research Logs: The Most Important Tool for Organizing Your Family History," *Genealogical Journal* 30 (2002): 10-11.

<sup>5</sup> Mills, "Dissecting the Research Problem".

<sup>6</sup> Mills, "Genealogical Mindset & Principles of Scholarship".

<sup>7</sup> Elizabeth Shown Mills, "Dissecting the Research Problem".

<sup>8</sup> Ibid.

7. Researcher ignorance. *Solution:* Keep asking why the records show what they show (or do not show) and what that implies. Continue your genealogical education until death and beyond.

### Solving Tough Research Problems Checklist

Use the following ideas to find answers to really stubborn family history research problems (brick walls):

#### A. Preliminary Attitudes and Mindset

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Use these attitudes in all situations and at all times from the beginning of your research.

1. **Start with the most likely records.** Always use sources with the best odds of success first. If those don't solve the problem, turn to less likely ideas. Keep searching even the least promising possibilities.
2. **Go from the known to the unknown.** Find recent events first. Then work back to earlier events.
3. **Focus on one question at a time.** Pick ONE event (for example, John Doe's birth) and search until you find it. Stick with it. Gather anything you find on the family and associates, but concentrate on the event you selected. Do not change focus until you either find it or exhaust **all** possibilities trying.
4. **Look for alternate spellings and nicknames.** Some ancestors are listed by nicknames (Polly for Mary, Bob for Robert), by a middle name, or by initials. Also search for alternate spellings. Clerks misspell names all the time, and indexers have difficulty reading them. Think phonetically. For lists of possible spelling substitutes see pages 331 and 336 of Kory L. Meyerink, ed., *Printed Sources: A Guide to Published Genealogical Records*. (Salt Lake City: Ancestry, 1998). [FHL book 016.9293 P96]. Failure to find some quirky versions of the individual's name is a red flag that you probably aren't being imaginative enough during your searches.
5. **Do not trust indexes** (*that do not answer the main question*). If he *should be* in the index *but is not*, search the record page-by-page until you find him. Even if you do find him in the index, thumb through the records for places they missed him in the index until you answer the research question.<sup>9</sup>
6. **Do not trust copies selected by someone else.** If possible, look at the original with your own eyes.
7. **Make friends with the librarians and archivists.** Being nice to the staff at a library or archives often pays big dividends. CAUTION: It is **not** always to your advantage to be considered a genealogist.

#### B. Fundamentals

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These are the basics. Use these strategies on every genealogical problem, especially really tough ones.

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<sup>9</sup> Elizabeth Shown Mills, "Land Records" (lecture in Course 4 Advanced Methodology & Evidence, Institute for Genealogical and Historical Research at Samford University, Birmingham, Ala., 15 June 2005).

8. ***Start with a well-documented family group record.*** Compile a family group with a source footnote for **every** source that mentions the family. Show **every** event for **every** family member (not just birth, marriage and death events), including census, migration, military service, jury duty, acquisition or sale of land, and wills. This family group record becomes a roadmap of clues to suggest further places to research.
9. ***Research logs.*** Keep good *research logs* for each family.<sup>10</sup> List the objective of each of your searches, for example, list John Doe's name and the type of event (birth, marriage, or death). List every record you plan to search BEFORE you search it. If you do not find what you seek, write "nil" on the log so you know you have already searched there and do not need to repeat that search. Too many "nils" show you should search elsewhere. If you DO find it, summarize what you found (person and event). Also list letters you write, phone calls, and Internet searches and results on your *research log*.
10. ***Document and organize AS YOU GO.***<sup>11</sup> When you search a document but it has no information about your ancestor, his kin, or his neighbors, write "nil" in the results field. If you DO find something, do the following before you look for any more documents (or lay your head on your pillow):
  - a. Photocopy the new source document.
  - b. Identify the source (footnote information) on the *front* of the photocopy.
  - c. Write your own document filing number on the *back* of each photocopy.
  - d. Log the new document number, and summarize the events/people you found on all appropriate logs.
  - e. Transfer new family data from the source to appropriate family group records.
  - f. Enter new source footnotes for **every** piece of data on a source, even if that event already has a note.
  - g. Add a preliminary assessment of the of the data and its reliability to the end of each source footnote.<sup>12</sup>
  - h. Print the updated family group record.
  - i. File the new family group and photocopy.
11. ***Search large databases for John Doe's family name.*** See the FamilySearch Wiki page for *Major Databases for United States Research* and the page *Gather Low-Hanging-Fruit Sources* for ideas.
12. ***Look for John Doe's death documents.*** Look for obituaries, church burials, church bell tolling lists, funeral sermon eulogies, funeral home records, funeral cards, tombstones, sexton's records, insurance, pensions, Social Security, death certificates, family Bibles, wills, estate papers, and land sales papers.
13. ***Local histories, biographies, and genealogies.*** Town and county histories often have biographical information about citizens. Look in the Family History Library Catalog Locality Search under UNITED STATES, [STATE], [COUNTY] — HISTORY for counties, or [STATE], [COUNTY], [TOWN] — HISTORY for town histories. Repeat for the topic BIOGRAPHY and again for GENEALOGY.

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<sup>10</sup> Dilts, "Research Logs: The Most Important Tool for Organizing Your Family History," 10-11.

<sup>11</sup> Carol Harless, et. al., *PAF Documentation Guidelines* (N.p.: Silicon Valley PAF Users Group, 1993), 1.

<sup>12</sup> Mills, "Dissecting the Research Problem".

## C. Advanced Research Strategies

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These methods may not be needed for every problem, but often help solve tougher research questions.

**Be innovative. Force your brain to think about the problem in new ways. Break out of the box!**

14. **Draw a time line** showing EVERY documented event in John Doe's life. Include schooling, wars, censuses, births-marriages-deaths of relatives, emigration, everything! Then work to fill in the blanks.
15. **Organize, review, and evaluate the evidence.** Summarize the problem. Rearrange relevant sources in a different logical order. Review old sources for overlooked clues. Separate what you assume from what you know. Sort and weigh the evidence. Analyze information for relevance, directness of the evidence, believability of the source, likelihood of the event, transcription errors, accuracy of data, and consistency with other facts. Write a formal research report to clarify your thinking. Write why you searched where you did, what you found or did not find, what that means, construct a well-documented family group record, and list what should be searched next, why, how long that will take, and the likelihood of success.
16. **Use forms to create new brain connections and raise questions.** Create in-out lists to help track each piece of family land. Compare changes in census answers over the years. Ask questions beyond the detail that is obvious. Suggested forms: Holes to fill in a person's life, Source citations that need completing, Facts that need better evidence, Facts that seem questionable, Ancestral associates and their roles.<sup>13</sup>

**Expand the number of sources used.**

17. **Be thorough.** Use ALL types of census schedules including local copies where they exist. Analyze ALL the tax records, land and property records, mortgages, each and every variety of estate probate papers. Study surrounding entries looking for neighbors and associates. Find every document available.<sup>14</sup> Think about and watch for associated papers created at the same time as the ones you have already found.
18. **Substitute record types.** Stay focused on one question, but change the record type you search to find the answer. See the *United States Record Selection Table* in the Wiki ([https://familysearch.org/learn/wiki/en/United\\_States\\_Record\\_Selection\\_Table](https://familysearch.org/learn/wiki/en/United_States_Record_Selection_Table)) to identify alternative record types you could use to find answers to your genealogical question.
19. **Use Wiki state pages as a checklist.** The FamilySearch Wiki's state and national research pages describe record types useful for those places. Search EVERY record type. State and territory pages are listed in the Wiki under "Category:States of the United States" ([https://familysearch.org/learn/wiki/en/Category:States\\_of\\_the\\_United\\_States](https://familysearch.org/learn/wiki/en/Category:States_of_the_United_States)).
20. **Switch jurisdictions.** If the answer you want isn't found in county records, then search at the town, state, and national levels for similar records. Write or search catalogs for larger or smaller jurisdictions of the organization.

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<sup>13</sup> Ibid.

<sup>14</sup> Ibid.

21. **Area searches.** Look in neighboring counties or towns. Conduct an area search of surrounding towns and counties within 5, 10, or 25 miles of the place where they lived. Gradually expand distances searched.
22. **Try an exhaustive preliminary survey.** Search Ancestry.com and FamilySearch.org for your ancestor. Also, use the “Genealogies” (<https://familysearch.org/family-trees>) part of FamilySearch. Thoroughly search for John Doe’s family in every source in the “Genealogy” and “Biography” sections of the *United States* page on the Wiki, and same sections in the Wiki’s state page for John Doe’s state. Look up the family name in the appropriate “Regional Indexes” cited on pages 440-41 in the first edition of Arlene Eakle and Johni Cerny’s *The Source: A Guidebook of American Genealogy* (Salt Lake City: Ancestry, 1984). [FHL book 973 D27ts].
23. **Search more libraries and archives.** Research the neighboring courthouses, town historian’s office, small-town public library, local county and state historical and genealogical societies, state library, law library, and archives, government documents library, and National Archives.

**Search records of kin, neighbors, and associates.**

24. **Find John Doe’s children.** Thoroughly research the children to find clues about the parents.
25. **Research neighbors and relatives.** People move in groups. The neighbor often came from the same place as your ancestor. Plat your ancestor’s land, and run the deeds of each neighbor. Find out who the witnesses on documents are.<sup>15</sup> Study a family in community context. Study people in the area with the same surname, and with different surnames in the same house. Identify census neighbors at least 12 before/after. Near a county/state line, study families over the line. Comb the area for same first names, origins, or jobs.<sup>16</sup>

**Use methodical logic, deduction, inference, and inspiration to shed new light on the problem.**

25. **Create a master research plan.** Identify a problem. Set a research goal. Figure out which records are likely to contain answers, and which repositories to use. Track ‘em down. Write up and share the results.
27. **Correlate records of neighbors to infer, analyze, and synthesize data and relationships.** **Infer:** Calculate birth dates from: age on gravestone; age on census—even tallies; age at marriage; birthdates of older or younger siblings; age of siblings at death. Calculate marriage date from: birth of first child; average marriage age of men & women. **Analyze:** Which families with the right surnames lived closest and were likely related? **Synthesize:** What possibilities can you disprove? What’s left? What is most likely or least likely? Organize and sort what you know and look for similarities and dissimilarities. Keep asking what your correlated sources imply about subtle relationships, or further records and clues.<sup>17</sup>
28. **Study migration patterns** to infer places of origin. Rivers and mountains channeled migration trails into predictable patterns. When you know where a family settled, you can

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<sup>15</sup> Elizabeth Shown Mills, “Rural Strategies: Correlation of Land & Other Records” (lecture in Course 4 Advanced Method-ology & Evidence, Institute for Genealogical and Historical Research at Samford University, Birmingham, Ala., 16 June 2005).

<sup>16</sup> Elizabeth Shown Mills, “Censuses: Analysis, Interpretation & Correlation” (lecture presented in Course 4 Advanced Method-ology & Evidence, Institute for Genealogical and Historical Research at Samford University, Birmingham, Ala., 13 June 2005).

<sup>17</sup> Mills, “Rural Strategies: Correlation of Land & Other Records”.

often infer where they came from. First settlers often named their new town after the place they left behind.

29. **Try to disprove uncertain connections.** Use a process of elimination to find ancestors. If a person died too early, lived too long, or lived in the wrong place, he isn't yours. Drop people from the list by finding their death records (or by finding them in records after your person died). Always attempt to disprove what you think is the last remaining link too. Test new information by comparing it with what you already know.
30. **Listen to your feelings.** Use inspiration and intuition wisely as a guide to help your research.

#### **D. Continuing your education, and do good follow up**

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Some really tough problems are solved as a result of learning more, or by good follow up.

31. **Get an education.** Read the wiki ([wiki.familysearch.org](http://wiki.familysearch.org)) and how-to genealogy books for John Doe's state and nation. Study histories of John Doe's town, county, and state. Subscribe to periodicals of local genealogical societies where John Doe lived. Subscribe to Internet RSS feeds for the area where John Doe settled, his ethnic group, or religion. Read case studies in magazines like *NGS Quarterly* to learn how to solve tough problems and give you hope. Take *classes*, attend lectures, join in computer "chat" sessions, and go to genealogical conferences about the area where the family settled, their ethnic group and religion, and about genealogical research methods. *Travel* to the places where John Doe's family lived to see cemeteries, neighbors, old folks, archives, libraries, churches, genealogical and historical societies, and learn about the local way of life.
32. **Get help.** Do genealogical good deeds. Write to and join local genealogical and historical societies for help. Place queries in their newsletters. Write to small-town newspaper editors and place a query in their newspapers. Place queries at genealogical web sites on the Internet and repeat from time to time until you get results. If the surname is unusual, telephone people with the same name. Nationwide telephone directories are available on the Internet. Leave a message in a Zip-Lock bag flag by a grave just before Memorial Day. Hire a professional genealogist. Pray for help. Submit ancestors for ordinances.
33. **Share.** Give in order to receive. Contribute to FamilySearch's *Pedigree Resource File*, to *World Family Tree* at [Genealogy.com](http://Genealogy.com), to OneGreatFamily, or to Kindred Konnections at [MyTrees.com](http://MyTrees.com), to Keith A. Johnson's *Genealogical Research Directory*, and to family group sheet exchanges advertised in the *Genealogical Helper*. Send a copy of John Doe's family history (include your address) to each county library and to each state and county genealogical society where John Doe lived. Publish an article on the family in their local genealogical periodical. Register your address in directories of members of genealogical Internet web sites and submit your genealogy to their libraries. Put your genealogy on a web page and register your site with major search engines and lists. Other researchers will start to contact you and share added details.

#### **Homework Assignment:**

1. Pick a tough problem, and resolve to work on it even if it takes until the next life to find the answer.
2. Try at least one of the strategies suggested in this class, starting TODAY!

## Endnotes

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