

# Efficient Locality Research with AI: Discovering New Avenues of Exploration

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Researching the locations where your ancestors lived, worked, and built their communities opens new possibilities in your family history research. By using artificial intelligence tools alongside traditional methods, you'll discover new records and resources, make connections within your ancestor's community, and gain a deeper understanding of their lives.

## Understanding AI's Role in Genealogy Research

When used appropriately, AI (Artificial Intelligence) can be a powerful assistant in genealogical research. Understanding AI's different roles helps us use it effectively.<sup>1</sup>

- **AI as Person:** Treating AI as a person means recognizing that it is unpredictable and should be approached as a collaborative partner rather than a simple tool.
- **AI as a Creative:** The creative aspects of AI allow it to generate new ideas and perspectives, though we must be mindful that it may introduce biases.
- **AI as a Co-Worker:** When working with AI, think of it as a co-worker and divide tasks into those you'll do independently and those where AI can assist.
- **AI as a Tutor:** AI excels as a tutor by helping to summarize complex articles or teach difficult concepts.
- **AI as a Coach** In its role as a coach, AI can provide valuable feedback on your work and suggest improvements.

## Strengths of AI Tools for Locality Research

Several AI tools have proven particularly valuable for genealogical research.<sup>2</sup>

- **ChatGPT** (chat.openai.com) is a general-purpose AI assistant that excels at writing, analysis, and creative tasks. ChatGPT specializes in pattern recognition for historical place names,

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<sup>1</sup> Ethan Mollick, *Co-Intelligence: Living and Working with AI* (Portfolio, 2024).

<sup>2</sup> Claude AI chat initiated by Diana Elder, "summarize the strengths of LLMs for locality research from the provided document," 25 January 2025. Each LLM was asked to summarize the strengths of all five and that summarization was loaded into Claude as the data for an overall summarization.

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understanding complex administrative boundaries and jurisdictional changes, and suggesting alternative record sources based on location. Pro users can create Custom GPTs offer which are specialized tools created specifically for genealogical research tasks. Any user can access and use a Custom GPT.

- Diana's Genealogy Locality Guide Builder by Diana Elder: <https://chatgpt.com/g/g-Y7oqvFVmP-diana-s-genealogy-locality-guide-builder>
- Locality Guide for Genealogical Research by Mark Thompson: <https://chatgpt.com/g/g-TpLAlvCzD-locality-guide-for-genealogical-research>
- **Claude** (anthropic.com/claude) excels at analyzing historical context, processing structured data, and maintaining context over long conversations with multiple documents - making it particularly suited for in-depth locality studies that require careful analysis of various historical records
- **Gemini** (gemini.google.com/app) provides excellent support for real-time information and technical tasks. Gemini's strengths lie in its multimodal capabilities (analyzing historical maps/documents), real-time access to updated geographical data, and strong integration with mapping tools - valuable features for understanding changing boundaries and jurisdictions.
- **Perplexity** (perplexity.ai) can use different underlying models such as ChatGPT. It focuses on real-time search with source citations, aggregating information from multiple sources about specific locations, and identifying current repositories or archives in specific locations.
- **Microsoft CoPilot** (copilot.microsoft.com/chats) Copilot's strengths are in data organization (especially with Excel for historical records), integration with Microsoft 365 for collaborative research, and ability to help process and analyze large datasets of genealogical records.

## Using AI in the Research Process

AI can assist in each step of the research process, from determining an objective to writing conclusions. Once you've decided on an objective, the next step is to create a timeline analyzing every record already found for the research subjects. Take note of specific locations to study to understand their life events better. Choose the location of most interest and create a locality guide for holding information on its background and relevant record collections.

From the timeline and location study, you can make a research plan to follow. Keeping a research log and accurate source citations will ensure you can return to each source searched. Finally, writing a conclusion will help you synthesize everything you learned during the project.

The locality research portion of the process is key to making progress on even the most difficult brick walls.



## Best Practices for Working with AI

### Prompt Engineering

- Give the AI the following information when designing a prompt
  - Role: "You are an expert genealogist:"
  - Goal: What you are trying to achieve
  - Text: Upload a .csv file, document, or paste in text
  - Task: What specific task AI should do with the text
  - Flask: How do you want the response? Include bullet points, narrative, table, etc.

### Verification and Documentation

- Always verify AI-generated information through traditional genealogical research methods.
- Use multiple AI tools to cross-reference information and get different perspectives.
- Document the specific AI tool and date used for future reference.

### Task Management

- Break complex research problems into smaller, manageable pieces that AI can help address.
- Use AI as a supplement to, not a replacement for, traditional research methods.
- Start with simple, specific tasks when learning to work with AI tools.

## Locality Research and AI

Although valuable in the research process, locality research can be time-consuming and tedious, but using AI as a tutor and a co-worker can streamline the process. AI excels at some parts of locality research and struggles with others.

#### Areas where AI Excels at Locality Research

- Processing large amounts of historical data and writing citations for source material
- Summarizing a web page that lists details about the record collection

- Searching multiple websites simultaneously (although current internet content may be limited)
- Identifying patterns in migration
- Creating tables and timelines to show specifics for a locality easily

Areas where AI struggles with locality research

- Identifying relevant historical databases (cannot access collections behind a paywall or password-protected site)
- Finding historical laws and statutes since they are often located deep in a website

## References and Resources

### Books and Articles

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## Blogs and Podcasts

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---- "RLP 115: Revisiting Locality Research." *FamilyLocket*. <https://familylocket.com/rlp-115-revisiting-locality-research/>. Posted 21 September 2020.

Thompson, Mark and Steve Little. "The Family History AI Show." Podcast. <https://podcasts.apple.com/us/podcast/the-family-history-ai-show/id1749873836>

## Facebook Groups

Genealogy and Artificial Intelligence (AI) <https://www.facebook.com/groups/genealogyandai>

# Locality Guide Template Categories

## Background

### Quick Facts

*Capital, dates of county formation, state formation, type of land (state land vs. federal land) when registration of births and deaths began, etc.*

### Online Research Guides

*Links to the FamilySearch wiki guides about this locality and other guides online*

### Geography and Maps

*Boundary changes, neighboring counties/towns, links to gazetteers, historical maps*

### Timeline of Major Events

*Timeline of the area, including major government changes and events*

### **History**

*History of settlement, links to history articles and books about the locality, major periods, military engagements,*

### **Migration Routes**

*Describe the main migration routes through your locality and link to maps and articles about the subject.*

### **Law and Government**

*Old books that have been digitized (via Google Books, Internet Archive, Geneanet, etc.) that contain the laws and statutes of the particular locality that you are researching; blog posts and articles about laws in your locality (check out the Legal Genealogist blog and library websites)*

### **Libraries and Archives**

*Repositories, courthouses, public libraries, genealogical libraries, etc. that are within the locality or specific to the locality, research aids. "America's Best Genealogy Resource Centers" by William Dollarhide and Ronald A. Bremer identifies the top 10 in each state and includes contact information and a summary of the record collections.*

### **Genealogical Societies and Publications**

*List the genealogical societies and their publications about the locality.*

### **Record Loss**

*List any record sets that have been lost due to courthouse fires, floods, etc. and any record substitutes.*

### **Local History**

*Local history books: county histories, town histories, etc.*

### **Reference Books**

*Additional books pertaining to research in this locality.*

## **Record Collections**

### **General Collections**

*Ancestry.com, FamilySearch.org, MyHeritage.com, FindMyPast.com etc. catalog titles about the locality*

### **Bible Records and Compiled Genealogies**

*Links to websites that have Bible records for the locality*

### **Cemetery Records**

*Links to cemetery records in the locality*

**Census Records and Substitutes**

*Links to different types of censuses: federal, state, town, colonial, territorial, census substitutes, etc.*

**Church Records**

*List the various denominations and where their records are kept.*

**Court Records**

*Links to court record collections and descriptions of what they contain*

**Ethnic Records**

*List the various ethnic groups in the locality and what unique record collections are available about them.*

**Immigration and Naturalization**

*Describe immigration in the locality and link to the associated record collections.*

**Land Records**

*Link to collections about land grants, patents, bounty lands, and other land records.*

**Legislative Records**

*Link to collections about legislative records, if applicable, i.e. Virginia's legislative petitions.*

**Military Records**

*Colonial, militia, war, regimental histories, etc.*

**Newspapers and Directories**

*Link to websites which contain digitized newspapers for your locality or how to find them if they aren't digitized.*

**Probate Records**

*Link to record collections about will administration, probate, etc.*

**Vital Records (Birth, Marriage, Death)**

*List the start of registration for birth, marriage, and death records. List any Gretna greens.*

**Tax Records**

*Link to tax record collections, personal property tax, land tax, etc.*

**[Add additional sections depending on your locality and what types of records exist]**

This template was created by Nicole Dyer and Diana Elder.

A link to this template is found in the book "Research Like a Pro: A Genealogist's Guide."