Packrat of Genealogist? Effective Methods for Organizing Your Family History Research

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Are you drowning in a sea of papers, documents, old photographs and other research materials? Do you often feel like a family history hoarder? Perhaps it is finally time to purge your inner packrat and bust through the clutter. Key topics:

- How to organize family history documents, photographs, for quick retrieval
- The pros and cons of going paperless
- Stress-free filing strategies and creating checklists to stay on track
- Effective ways for distributing and sharing genealogical information

Recording Data

- Use a Genealogy software program
- Research planner
- Research log
- Ancestor Data Sheet or Biographical Forms
- File Storage (computer and cloud) – always back up your data

Sharing Information

- Online family tree
- Printed Book or eBook
- Family Website
- Blog
- Facebook, X, Pinterest, YouTube
- Make a provision in your Will. Who will inherit your genealogy research?

Paper Storage

- Use archival quality supplies
- Be mindful of temperature changes and light sensitivity
- Keep originals in a safe place (fireproof safe, safety deposit box, etc.)
- Scan documents and photographs to have an electronic copy/backup

Filing: Using Binders

- Use a three-ring binder system
- One binder for each surname
- Label subject dividers by record type
- Put copies of corresponding documents behind the divider
- Once it gets full, subdivide into smaller binders or switch methods

Filing: Using File Folders

- Get a filing cabinet or plastic storage crate or portable file cart and file folders
- Store documents according to surname and geographic locality (e.g. "FENSCAK, JOHN: Allegheny County, PA, 1911-1966"
- Subdivide them by record group and organize by record group (e.g. "Allegheny County, PA: Vital Records" "Wills," "Internet Sources,")
- **Pros:** Keeps sources neatly organized; **Cons:** Bulging files

Filing by Surname

- Make separate file folders for the surname and type of record (e.g. "FENSCAK: Census," "FENSCAK, Passenger Lists," etc.)
- Give each record a page number (in the same place on each document)
- For easy retrieval, create a Table of Contents (Date, Name, Type of Search, Location, Page Number). Create your own in Microsoft Word (use the Table feature and label it with the surname in the upper left-hand corner and type of record in upper right-hand corner); or use a template – google for free templates
- When you find new sources or add new photocopies to the files/update TOC
- If you have a document that pertains to two surnames (e.g. marriage license), make a copy for each file and enter both on the TOC for each file

Filing by Couple

- Create a Family Group Sheet for each married couple
- Every couple gets a folder
- Label with names of the couple (include wife's maiden name) (e.g. "MICHAEL FENSCAK and HELEN LESKO")
- You can write the names of the couple's children on the outside of the folder
- File all documents you find on the couple in the folder(s)
- When a child marries, start a new folder for that couple (e.g. "JOHN FENSCAK and Anna MALI")
- If a child does not marry, keep his/her documents in the parents' file
- If the child remarries, assign a new folder for the new marriage and any new children from that relationship
- File folders alphabetically by the husband's name
- Use colored paper to separate records and create a TOC for each folder
- Make duplicate copies of documents that apply to more than one couple (for example a census record where the father and mother live with son and wife)

Organizing Miscellaneous Documents

- You may have research guides, maps, state archives or repository information, or historical data or articles that do not easily fit into files
- Use a separate binder to file resources
- For heirlooms or one-of-a-kind items use archival quality (acid/lignin-free) storage

Organizing Photographs

- Organization is the **key** to keeping photographs safe, dry and preserved
- Storage: Acid-free albums or sheet protectors
- Put labels on the outside of the sheet protectors to identify those photographs, and mark the names and date lightly in blue pencil on the back
- Scan all family photographs into digital files and keep backups
    - JPEG (compressed; best for Web pages)
    - TIFF (best for printing)
    - PDF (embeds fonts and images in one layer)
    - GIF (often used on the Web)
- Catalog the images into a database to keep track of them
- Storage in acid-free materials at a temperature of no more than 77 degrees & 40 percent humidity and avoid heat, floods, scratches, etc.
- Vivid-Pix Memory Station: **https://lisaalzo.com/memorystation**

Electronic Files

- Create surname directories on your computer hard drive
- Create sub-directories for different types of records
- Using naming conventions that make it easy for you to search
- Add tags and metadata
- Always back up your digital files (consider "cloud storage" options)
- Convert old films, slides, videotapes to more accessible format
- Consider CD and DVD longevity: (30, 50, 100 years? It depends…)

Going Paperless

- Upgrade your equipment ever few years (avoid obsolescence)
- Transfer files to new media as soon as available
- Keep printed copies of very important/irreplaceable documents
- Don't become a "digital hoarder" "Just say, "No!"
- Establish a routine to back up your data!

Additional Tips

- Try not to work on multiple lines at the same time (find a focus)
- Organize/file as you go or keep a "To File" box handy for when you have time.
- When working on one line, keep research on other lines neatly filed away
- Set **SMART** goals **http://en.wikipedia.org/wiki/SMART_criteria**
    - Specific
    - Measurable
    - Attainable
    - (Actionable)
    - Relevant
    - (Realistic)
    - Time-bound

- Use a Research Planner and Correspondence Log to stay organized
- Avoid "out of sight, out of mind."
- Schedule clean-out time once a month.
- Back up what you need.
- Clean up the file folders.
- Purge duplicates outdated information.
- Consult Groups/Pages on Organizing and Genealogy on Facebook,

Important Considerations: Trash or Treasure?

- Organizational mindset (starts inside not outside)
- Every person is different; do what works for **you**!
- Living space and work environment
- Memories
- Emotions and sentimental attachment
- Monetary value?
- What benefit does the item or information provide to me? The family?
- Ask important questions:
  - Is this item, document, photograph, information irreplaceable/one of a kind?
  - Will a digital version be available or suffice?
  - Who will inherit the information or items when I die?
  - Can I be "ruthless" in my cleaning and purging if I need t

Staying organized takes time and discipline. Find a system that works for YOU!

Selected Bibliography

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