

Outline for Organizing and Inventorying Genealogy Research

1. Assess and Gather Your Materials

- **What to Include:**
 - Paper documents: birth, marriage, and death certificates, census records, wills, etc.
 - Photographs and memorabilia.
 - Digital files: PDFs, images, genealogy software files, emails, etc.
 - Notes and written family stories.
 - **Activity:**
 - Create a checklist of all the types of materials you have or need to locate.
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2. Categorize Your Research

- **By Family Line:**
 - Organize by surname or family branch.
 - Use color-coded folders or labels for each family line.
 - **By Document Type:**
 - Separate vital records, photos, letters, and research notes.
 - **By Geography or Timeline:**
 - Group records by location (e.g., states, countries).
 - Create sections for each century or decade for historical records.
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3. Create an Inventory System

- **Paper Records:**
 - Use binders or archival boxes with labeled dividers.
 - Number each item and log it in a spreadsheet or document.
- **Digital Files:**
 - Establish a clear folder hierarchy, e.g.:
 - *Genealogy > Surname > Birth Records > Smith_Jane_1885.pdf*
 - Use consistent naming conventions (e.g., *LastName_FirstName_DocumentType_Year*).

- **Photographs:**
 - Scan and label photos with names, dates, and locations if known.
 - Store originals in acid-free envelopes or albums.
 - **Activity:**
 - Use a free or paid inventory template (spreadsheet or app) to track what you have and where it's stored.
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4. Back Up Your Research

- **Physical Copies:**
 - Create duplicates of key documents for trusted family members.
 - **Digital Backups:**
 - Save files on an external hard drive.
 - Use a cloud storage service (Google Drive, Dropbox, etc.).
 - **Redundancy:**
 - Keep backups in at least two locations (e.g., home and a family member's house).
 - **Activity:**
 - Schedule a recurring calendar reminder to update your backups.
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5. Document Your Research Process

- **Research Log:**
 - Record where you found each piece of information (e.g., websites, archives).
 - Note unsuccessful searches to avoid duplication.
 - **Source Citations:**
 - Include citations for all records to verify their authenticity.
 - Use templates for standard citation formats like MLA or Chicago Style.
 - **Activity:**
 - Create a "Research To-Do List" for future questions or gaps.
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6. Share and Collaborate

- **With Family:**
 - Share summaries of your research via printed booklets, presentations, or private family websites.
 - **With the Genealogy Community:**
 - Post findings to genealogy forums or platforms like Ancestry or FamilySearch.
 - **Activity:**
 - Identify a family member or genealogist to act as a co-custodian for your research.
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7. Preserve for the Long Term

- **Physical Materials:**
 - Use acid-free, archival-quality storage.
 - Avoid storing items in basements or attics (extreme humidity and temperatures).
 - **Digital Preservation:**
 - Convert old media (e.g., VHS tapes, floppy disks) into modern formats.
 - Check files periodically to ensure compatibility with current technology.
 - **Activity:**
 - Create a "Genealogy Will" to specify who will inherit your research and how it should be maintained.
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8. Regularly Review and Update

- **Refresh Organization:**
 - Check for misplaced or outdated materials.
- **Revisit Research:**
 - Look for gaps or new research opportunities.
- **Activity:**
 - Set an annual "Genealogy Audit Day" to update your records and backups.