



Willowtree Research Genealogy Services

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**What's Your Mission:
Inherited Collection, Futureproofing,
or Attacking Your Stacks?**

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OVERVIEW

CHAOS to ORDER.

DEFINITION – every inherited “bundle” or your own “stacks” needing dealt with, or the totality of all your prior research – NO MATTER ITS SIZE - is a COLLECTION.

INHERITED COLLECTION & ATTACKING STACKS

Sifting through someone else's work may offer rewards like valuable clues or even huge discoveries. We just need a strategic plan.

PREPARE: ON THE LAUNCH PAD

THOUGHTS ...Before the real work begins

What is your ultimate goal for this project?

- A) Try to keep what you inherited in context. (Examples: a scrapbook or photo album.)
Sometimes removing items risks damaging them.
- B) Physical objects (memorabilia or larger items) need to be handled differently from genealogical documents like vital records, photographs, books, or family papers.
- C) Don't take everything at face value. **ACCURACY is the biggest concern.**

STEP-BY-STEP PROCESSING OUTLINE:

See pages 10-11 in this handout throughout this presentation.

STEP ONE: BLAST OFF!

Take Stock, Survey & Inventory Your Collection

Possibly the hardest step, but essential.

Part A – TAKING STOCK:

Meaning: To assess what you have inherited.

- ❖ This step takes a **high-level look**.
- ❖ Begin a list of the prevalent categories for the materials.
- ❖ Note the overall condition of the materials.
- ❖ Note immediate preservation needs.

Part B – SURVEY:

Meaning: “To examine condition, situation or value.”

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Goals of the SURVEY are three-fold:

- to identify the categories of materials in your collection.
- Assess the condition of the materials. Does anything need preservation?
- Identify the major surnames captured by these materials.

WHAT is contained in this collection?

SKIM through each item to decide –

- What is it? (Photo, letter, Family Group Sheet, census, newspaper clipping, something else?)
- Who is it about? (One person, one family, multiple generations?)

Record your survey results as you go.

Use a Survey form like the American Ancestors one in your handouts. Or create your own.

Assign a name to your Collection.

Top of the form asks for the name and date of the survey.

What names / family lines?

- Identify the names associated with your collection.
- Who are the creators of letters, scrapbooks, and other items?
- Review your photographs, can you identify individuals?

Major contributors to the collection?

Your project / collection consists of what quantity and type of container?

What document types do you have?

What special formats do you find?

Conservation / Preservation concerns?

Estimate of storage supply needs for gather or purchase.

Note condition of all the material.

INVENTORY:

A much more detailed task, resulting in an itemized list.

Meaning: To Itemize.

- Won't be accomplished in one sitting; may be a long process.
- Set up a workflow process (a sensible, repeatable order of tasks for the work) that makes it easy to pick up the project and put it down while simultaneously keeping track of where you stopped.
- Recording and tracking your progress avoids duplication of effort and a waste of time figuring out what's been done every time you come back.

An Inventory gives information such as Box #, Item Description, When was it created?, Who created it?, and Condition of item.

You can track your INVENTORY progress in a variety of ways:

- Project Spreadsheet – advantage that your info is sortable
- Word document – simple, and most everyone is familiar with the format
- Evernote or OneNote – some people love, consider it file folders in the cloud
- Paper spiral notebook – tried and true, perfectly functional

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Whatever form it takes, your INVENTORY gives an at-a-glance look at the whole Collection.

Do what works for you!

STEP TWO: ASCEND!

Classify, Organize & Sort

Minimizes repetition and effort to find what you need.

What will this Collection's organizational system be like?

Make sure it fits into any system you're already using.

Does your current organizational system need any refinement?

Think of your classification process as nested layers. Examples:

A POPULAR way to classify is –

Surname Group

Individual

Type of Record or Type of Material

Item

MINE is –

Surname Group

Individual

Type of Record or Type of Material

Item

TOP LEVEL LAYER:

A good arrangement is to group like items together, so you don't have to look in several places for closely related items. Two common top-level choices are:

- By Surname, alphabetically
- By Grandparent Line
 - Many genealogists begin by starting with four ancestral lines, one for each of their grandparents.

SECOND LEVEL LAYER:

- By Generation / Individual
- By Couple or Family Group
- By Fact Type – All papers related to a specific fact type together (i.e., birth, marriage, census ...)

ADDITIONAL REFINEMENTS (LAYERS):

- By Material Type –
 - Genealogical material
 - Documents
 - Written material
 - Photos
 - Artifacts / Memorabilia
- By Location – Country, state, county, or town to reflect your ancestor's migration
- By Record Type –
 - Vitals
 - Church and cemetery
 - Census
 - Military
 - Land

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- Probate
- Chronologically

CREATE A STYLE SHEET:

- Physical –
 - Boxes or other containers
 - File drawers
 - File folders
 - Photographs
- Digital –
 - Documents
 - Photographs

THE MAIN THING IS TO BE LOGICAL. KEEP IT SIMPLE BUT BE CONSISTENT.

SORTING

(BRINGING ORDER OUT OF CHAOS)

This is the most satisfying piece!

Divide the material by your top-level layer – just into piles for now is fine.

If the Collection is large, stash the piles into bins or boxes and deal with them one at a time.

- Clear boxes with a sticky-note inside work well. Stackable. These are not permanent storage.
- Label each bin right away.
- Make a list (maybe a Word doc) of things needing more research - a “Mysteries” folder.
- Choose storage for your bins: a dark, temperature stable, undisturbed space.
- Conquer small chunks, tackle a box at a time or a surname line at a time.
- Work on it piecemeal.
- Put each item into a labeled folder or box, following your organization plan.
- Begin your “Mysteries” list / folder.

STEP THREE: ACHIEVE ALTITUDE! **Evaluate & Analyze**

COLLECTION AS A WHOLE:

What dates does your collection span?

What was standard practice for family history research at that time?

Analyze for potential new information you can add to your own research. Use questions modeled on the **Genealogical Proof Standard (GPS)** and the Elizabeth Shown Mills **3x3 Analysis** method.

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GENEALOGY PROOF STANDARD:

- ❖ Thorough, exhaustive research – looked absolutely everywhere we can.
- ❖ Clear citations are kept.
- ❖ Analyze and make correlations – wring every detail out of the record.
- ❖ Study any conflicts / discrepancies discovered.
- ❖ Write out your best theory to explain any discrepancy.

PRINCIPLES OF 3x3 ANALYSIS:

SOURCE CLASSIFICATION

RECORDS –

Original Sources:

Are from the time-period being researched, including:

- Original record
- Recorder / Clerk's copy is considered original
- Image / Digital copy, microfilm and microfiche are considered originals if they show the whole image and are not altered in any way.

Derivative Sources:

Written by someone who did not experience the events or time period, including:

- Transcripts
- Extracts
- Abstracts

May have transcription errors (human nature is always a possibility)

Writer memory may affect the contents

AUTHORED WORKS –

Present a person's conclusions, interpretations or thoughts from several sources.

Quality of compiled genealogies depends on the quality of the citations.

[NOTE: A compiled history is just ONE source, and not an ORIGINAL source.]

Does your collection include original documents?

Do any genealogy forms or charts include citations, even in simple handwritten form?

INFORMATION CLASSIFICATION

Who provided the information? (Sometimes found on the document)

- ❖ Participant (Primary – Informant is known)
- ❖ Someone Else (Secondary / Hearsay – Informant is known)
- ❖ Can't tell (Undetermined – Informant is unknown)

How soon after the event was the information written down?

- Is human memory an issue?

How does the information from the Collection compare to your prior research?

Can you explain any contradictions?

Is this information reasonable given what I know about the time, place, and family (the "sniff test")?

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STEP FOUR: ESTABLISH 1st STAGE ORBIT!

PLAN OF ACTION

USE DESKTOP SOFTWARE:

If you don't already use a genealogy software program, GET ONE.

A MUST HAVE no matter your experience level.

VERIFICATION EVALUATION FLOWCHART (on screen)

DEVELOP YOUR ACTION PLAN:

- ❖ **Action Plan Stage 1 – What do you want to learn?** (Goal – create a research question)
 - Start one family line at a time!
 - Capture name, place, and date
 - Focus on genealogical research questions of:
 - Identity
 - Kinship
 - Events
- ❖ **Action Plan Stage 2 – What do you already know?**
 - About Subject
 - Identify the Where and the When for your subject
 - Helpful to list vital events – with place
 - Name of spouses(s)
 - Names and dob(s) for children
 - About the Question
 - Not just what you know, but HOW you know it
 - Focus on what is relevant to the Research Question
- ❖ **Action Plan Stage 3 – Do some homework**
 - Examine background concepts to personalize your plan:
 - Learn about the history of your place and time
 - Learn about the geography (get a map)
 - Which records are most likely to have the answer you need?
 - Where are those records? Which repositories?
- ❖ **Action Plan Stage 4 – Create your personalized plan by putting it all together**
 - Group your Research Plan by locations (since that is how most records are held)
 - What types of records will you need?
 - What order will you search?
 - Start with the low-hanging fruit (the easy to find records).
- ❖ **Action Plan Stage 5 – Following your Research Plan, keep a Research Log of your search**
 - Decide whether you can combine the Research Plan / Research Log in one form.
 - The Log keeps track of what you have searched and what you have found
 - Write down search strings used and the results
 - Prevents rework
 - Record negative findings
 - Cite sources
 - Can be a roadmap for your entire research process if you need to duplicate it later.

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CREATE AN ITEM-LEVEL WORKFLOW AND USE IT.

❖ **Execute and fine-tune your Workflow** as you encounter new situations.

ENRICH YOUR RESEARCH

Now comes the integration with your prior research.

- ❖ Read each page in detail at this point. (In earlier Steps you were just skimming.)
- ❖ Compare the information to your own database.
- ❖ Verify any new information.
 - NEVER enter a new ancestor into your family tree without sources.
 - If the item names someone, go find the records to prove it, once satisfied THEN add them to your database.

ONCE VERIFIED, add it to your tree, with a good source citation.

When you uncover contradictions (and you will!), handle those as usual: Compare, Consider, and Continue researching until you can write a credible explanation for the discrepancy.

[TIP: These written explanations work well as Notes in your desktop software.]

TACKLE YOUR 'MYSTERIES' FOLDER:

Anything or anyone that hasn't been explained by now needs to be researched.

INTERPLANETARY MISSION! FUTURE-PROOFING

We move into our third type of Mission. Not exactly the same as the first two Missions, but closely connected.

It's just as important to prepare for when your descendants inherit YOURS! How ready are you?

STEP FIVE: JETTISON – STAGE SEPARATION! DIGITIZE

Evaluate your digitization needs

What do you need to scan?

- Most experts advise to scan everything you can.
- At a minimum, scan photos and documents that are significant &/or unusual. Even transcriptions if they are new information for you.
- Label and file each appropriately on your computer. Try to do this right away rather than waiting.

STEP SIX: SECOND STAGE IGNITION! RETAIN OR REDUCE

Don't forget –once digitized, you can keep a copy without taking any physical space.

RETENTION DECISIONS:

What to do when you can't keep it all?

Should we save everything?

- Save what is unique and significant. Obviously letters and diaries, or handwritten autobiographies, plus items with special meaning for you.
- Ditch duplicates or copies of the same item.

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- Some genealogists subscribe to the motto: *"Save it all, if you can,"* even when it is not new information, in honor of the ancestor(s) who preserved it. It may not be practical.

REDUCE WHERE FEASIBLE:

Start by seeing where you can reduce.

- ❖ Reduce it as you work with it, ideally in the Evaluation Step.
- ❖ Weeding non-valuable STUFF actually feels good AND makes a noticeable difference!

Consider Donation as a Reduction strategy

What can you DONATE? Search for likely **places** to donate.

- Library, archive, genealogical society, or other organization.
- You have pieces of certain location's history – might be meaningful to those groups.
- Prominent Names may also be helpful.
- The organization may have some particular steps to follow to prepare your collection for donation.

The Genealogy Center at the Allen County Public Library in Fort Wayne, Indiana is an excellent resource for both free digitization and donation. See: <https://acpl.lib.in.us/donations>

FamilySearch also actively welcomes donations to be digitized. See:

<https://www.familysearch.org/en/family-history-library/digital-library-donations>

"Rescue the Research" movement - gaining momentum across the country as local societies work to preserve research done by their past members.

STEP SEVEN: CRUISE ON COURSE! PERMANENT STORAGE & SHARING

Preserve the entire RETAINED collection in archival-quality mediums, such as acid-free boxes or polypropylene photo sleeves.

Share your treasure with other family members. Use your genealogical windfall to encourage others.

This is the best way for your research to pass the test of time.

Keep it fun and don't stress!
You CAN arrive at your destination!

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Further Resources

What to Do with Inherited Genealogy – Elevenses with Lisa, Episode 74

Lisa Louise Cooke, (her website, 2021, 52 min)

<https://lisalouisecooke.com/2021/10/13/inherited-genealogy/>

How to Progress from Inherited Research

American Ancestors – Ann G Lawthers (2022, 63 min)

<https://www.youtube.com/watch?v=0tF9NVZtXyl>

The 3 “Cs” Organizing Research Inherited from a Relative

Kate Eakman (MyHeritage blog, 2016)

<https://blog.myheritage.com/2016/06/the-3-cs-organizing-research-inherited-from-a-relative/>

7 Steps - Genealogy Workflow: Workspace, Organizing, Filing, & Research Process

Genealogy TV – Constance Knox (2021, 32 min)

<https://www.youtube.com/watch?v=cJ3M2PRiFIU>

Organizing and Preserving Your Family Papers

American Ancestors – Judith Lucey & Andrew Krea (2016, 60 min)

<https://www.youtube.com/watch?v=cJ3M2PRiFIU>

Survey form – separate file

Inventory spreadsheet – separate file

STEP-BY-STEP MISSION OUTLINE: ©Laura Street Chaplin, willowtreereseach.com, (630) 391-8873

1. **Take Stock, Survey, and Inventory.** Identify names associated with the materials.
 - a. ACTION ITEM #1.1 – Fill out your Survey form for your Collection. Remove metal fasteners as you find them.
 - b. ACTION ITEM #1.2 – Fill out your Inventory form. Allow whatever time it takes.
2. **Classify, Organize & Sort your collection** to make finding items easier in the future.
 - a. ACTION ITEM #2.1 – Choose your top-level criteria.
 - b. ACTION ITEM #2.2 – Choose your second-level criteria.
 - c. ACTION ITEM #2.3 – Choose any refinement criteria.
 - d. ACTION ITEM #2.4 – Create your Style Sheet. Write down all your organizational choices and your standards for physical folder/box/drawer labeling. How might you handle any unusual situations that emerge?
 - e. ACTION ITEM #2.5 – Enter all details into your INVENTORY record. You will want these later.
 - f. ACTION ITEM #2.6 – Physically sort your materials according to your plan and the steps above.
3. **Read for details and evaluate the content according to GPS & the 3x3 Analysis.** Are there sources? Original or derivative? Informant? Create a running To-Do list with questions that surface during your evaluation process.
 - a. ACTION ITEM 3.1
 - Check your inherited collection for original documents.
 - Decide on storage and handling needs for these items.
 - Note identified needs on your SURVEY form.
 - b. ACTION ITEM 3.2 – Check any genealogy forms and charts for citations.
 - Are there sources? Original or derivative? Informant? It's important to locate and review any sources given in this new material to confirm that you agree that the conclusion is valid.
 - Track down an authored work's source documents for yourself. This might take some work. Use any clues provided.
 - If it can't be found this MAY indicate it's problematic. Could human memory be an issue?
 - c. ACTION ITEM 3.3 – Compare the new material to your existing research.
 - Is there new information?
 - Is the source of new information cited?
 - If not, add an item to your To-Do: Evaluate both sets of information.
 - d. ACTION ITEM 3.4 – Compare the new material to your existing research.
 - Take note of any areas of disagreement?
 - Does the collection contain any record (a different book, document, etc.) that supports the new information, even though there is no citation?
 - If yes, add an item to your To-Do: Evaluate that other record.
 - e. ACTION ITEM 3.5 – If the new information passes the “sniff test”, then add an item to your To-Do: Locate a source for the information.
 - f. ACTION ITEM 3.6 – As you examine each item, list your assessment of its Source and Information on your INVENTORY form, correcting earlier assumptions as needed.
4. **Develop an Action Plan for conducting your verification research.** Verify and process new (or corrected) information to your tree.
 - a. ACTION ITEM 4.1 – Formulate a list of questions for the batch or family line you are working on

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- b. ACTION ITEM 4.2 – Consider creating a timeline for the people you are researching, perhaps in an Excel spreadsheet.
- c. ACTION ITEM 4.3 – Examine background concepts to personalize your plan:
 - Learn about the history of your place and time
 - Learn about the geography (get a map)
 - Which records are most likely to have the answer you need?
 - Where are those records? Which repositories?
- d. ACTION ITEM 4.4 – Create your Research Plan for your location.
- e. ACTION ITEM 4.5 – Choose format for your Research Log or combine with earlier Research Plan.
 - Track all searches and results
 - Record even negative findings
 - Cite each source
- f. ACTION ITEM 4.6 – Decide who you will invite to help execute your Workflow. Make your party plans and send your invitations.
- g. ACTION ITEM 4.7 – Follow your Workflow to integrate new information.
 - Read each page in detail. Get as much from every record as you can.
 - Verify any new information.
 - Compare, Consider, and Continue research on any Contradiction / Discrepancy until you can write a credible theory to explain the contradiction.
 - Check items off your To-Do list as you go.
- h. ACTION ITEM 4.8 – Spend some time tackling your “Mysteries” folder. You do NOT have to solve every Mystery!

5. Scan anything original or significant. File digitally.

- a. ACTION ITEM 5.1 – Give thought to your digitization process.
 - Gather any equipment needed (such as scanners).
 - Gather any supplies needed (such as flashdrives).
- b. ACTION ITEM 5.2 – Scan everything you can from the box you are working on.
- c. ACTION ITEM 5.3 – Immediately use a standard digital file-naming method.
- d. ACTION ITEM 5.4 – Place each file in its digital storage place.

6. Retain or Reduce. Make retention decisions. Reduce intelligently where feasible.

- a. ACTION ITEM 6.1 – WEED
 - duplicates
 - low-quality photos
 - photocopies (unless a hard to find item)
 - most originals of scanned items (be judicious)
 - and anything beyond saving.
- b. ACTION ITEM 6.2 – DONATE
 - Evaluate potential donation items from the weeded pile.
 - Search for likely people or organizations to receive the items.
- c. ACTION ITEM 6.3 – DISCARD
 - Discard the remainder of the weeded pile.

7. Permanent Storage. Guarantee survival through sharing.

- a. ACTION ITEM 7.1 – House your RETAINED Collection in permanent storage – preferably archival.
- b. ACTION ITEM 7.2 – Generously share your treasure in creative ways wherever possible.