



## *Why Organization Matters*

Without an intentional organizational system, family history researchers risk duplicated effort, lost evidence, weak conclusions, and long-term preservation challenges.

Organization is a process—not a one-time task. It develops through small, consistent actions.

---

## *Two Areas of Focus*

### **Physical Environment**

Your workspace supports accurate and efficient research. Make it work for you!

- Quiet, well-lit, and comfortable
- Uncluttered work surface
- Reliable internet connectivity
- Accessible reference materials
- Dual monitors when possible

### **Research Processes**

A consistent workflow supports accuracy, analysis, and sound conclusions.

- What systems do you already have in place?
- 

- Where does your process need help?
- 



## *The Genealogical Proof Standard (GPS)*

Organization underpins every element of the GPS:

1. Reasonably exhaustive research
2. Complete and accurate source citations
3. Thorough analysis and correlation
4. Resolution of conflicting evidence
5. Soundly reasoned, written conclusions

All conclusions remain subject to reevaluation as new evidence is discovered.

---

## *A Practical Research Workflow*

### **1. Set Clear Goals**

- Work in small, specific steps
- Capture goals in a spreadsheet or research software
- Avoid vague objectives

#### **Examples:**

Who was the father of Hector McLean born in Edinburgh, Scotland 31 October 1833 to Agnes Hunter and an unnamed McLean? His baptism was recorded 31 December 1833 in the South Leith parish church.

Who murdered Ben Merritt of Sawyer, Fillmore, Nebraska at Griswold, Cass, Iowa 3 November 1894? Sub-goal - Why was Ben Merritt in Griswold, Iowa the day before the general election?

### **2. Identify Resources**

- Identify record types and repositories most likely to answer the research question
- Use tools such as the FamilySearch Research Wiki
- Capture targets on a to-do list

### **3. Track Progress**

Tracking documents what you searched, where, and with what result—including negative searches. Set timelines and check your progress periodically.

#### **Common tools:**

- Spreadsheets
- Research logs
- Task management apps

#### **Typical fields:**

Goal | Resources | Location | Results | Document Analysis | Citation | Notes

#### **My Primary Tracking Method:**

---

---



#### 4. Analyze as You Go

- What type of evidence is present?
- Do facts agree or conflict?
- Can a conclusion be drawn?
- Is further research required?

#### 5. Log Results

Document research consistently:

- Record findings and non-findings
- Create full source citations
- Write research notes

#### 6. Write Conclusions

Conclusion statements should include:

- The answer to your research question
- The process of selecting, analyzing and evaluating sources, information and evidence that led you to your conclusion
- Enter conclusion in your permanent file

---

### *Tools & Trackers*

No single tool fits every researcher. The best tool is one you will maintain consistently.

#### **Common options:**

- Evernote ~ OneNote ~ Google Keep
- Microsoft Word
- Google Sheets or Excel
- Trello
- Evidentia
- Online trees (Ancestry, FamilySearch, MyHeritage)
- Desktop software (RootsMagic, Legacy Family Tree, Family Tree Maker)

#### **Tools I Currently Use:**

---

---

#### **One Tool I Will Commit to Using Consistently:**

---



## *Filing Systems*

### **Digital Filing**

- Create a logical folder structure (surname, location, record type)
- Use consistent file-naming conventions
- Mirror physical and digital systems when possible
- Maintain a regular backup routine

### **My Digital Filing Structure:**

---

---

### **Physical Filing**

- Use binders or file folders
- Label clearly (names, dates, places)
- Decide whether to file by family, record type, or locality
- Store originals in archival-quality sleeves or boxes

### **My Physical Filing Choice:**

Binders  File Folders  Combination

### **Primary Filing Method:**

---

---

## *Digitization & Scanning*

- Scan documents and photos at appropriate resolution (often 600 dpi)
  - Name files immediately
  - Avoid default filenames
  - Schedule regular scanning sessions
- 

## *Email & Correspondence*

Email often contains valuable research information.

- Save important messages as they come in
- Extract data into logs or notes
- Cite correspondence appropriately

## *Backup & Preservation*

Follow the **3–2–1 Backup Rule**:

- 3 copies of your data
- 2 different media types
- 1 offsite copy



Use a combination of external hard drives and cloud storage. Backups must be regular and verified.

**My Backup Plan:**

Primary copy: \_\_\_\_\_

Secondary copy: \_\_\_\_\_

Offsite / Cloud copy: \_\_\_\_\_

**Backup Frequency:**

Daily  Weekly  Monthly

---

*Building Your System*

- Be intentional
  - Start small: one person, one folder, one box
  - Adapt the system to how you think and work
  - If it does not make sense to you, you will not use it
- 

*Steps to Get Started*

- Take an inventory of both digital and physical assets
- Put your organizing goals in writing
- Set priorities based on time, budget, and urgency
- Create a simple timeline
- Develop a “Guide” to explain how your filing system works for future access

**My Top Three Organizing Priorities:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Action I Will Take This Week:**

---

---

*Key Takeaways*

- Consistency matters more than perfection
- Simple systems are sustainable
- Organization supports sound conclusions and preservation
- Progress happens over time
- Be kind to yourself if it doesn't go the way you think it should!



---

## Learn More About Getting Organized

- 5 Filing Systems - <https://www.familyhistoryfanatics.com/5-systems-for-organizing-genealogy-paper-files>
- Board for Certification of Genealogists, [Genealogy Standards](#)
- Cyndi's List - <https://cyndislist.com/organizing/>
- [Downsizing Your Family History](#) - <https://www.amyjohnsoncrow.com/downsizing-and-family-history/>
- [FamilySearch.org Research Wiki](#) – Organizing Your Files
- [“How to Use Evernote for Genealogy”](#) by Kerry Scott
- [“Organize Your Genealogy: Strategies and Solutions for Every Researcher”](#) by Drew Smith
- The Organized Genealogist Facebook Group
- YouTube Videos – on file structures, organizing both digital and paper files
- [Legacy Family Tree Webinars](#) – 28 videos on organization

---

## Notes

**All links active as of 1 February 2026**

*Presenter is not affiliated with any of the businesses or organizations discussed in this presentation. Providing these links does not imply endorsement of any of the above products or services. It is simply a starting place for you to explore resources concerning this important topic.*

