

Organizing for Genealogy

A Practical Framework for Getting Your Research Year Off to a Great Start

How to Use This Handout

This handout is designed to support reflection after the presentation. You do not need to absorb or apply everything at once. Use it as a reference you can return to as questions arise in your research. You may find that different sections become relevant at different times; that is expected.

Why Organization Matters in Genealogy

Genealogy is long-term, cumulative work. Records, documents, notes, and ideas accumulate over time, often faster than they can be processed. Because of this, organization is not a one-time task or a final, fixed system. It is an ongoing part of the research process, evolving and adapting with your needs as a researcher.

When organization does not support your work, it can become a source of frustration or overwhelm. When it does support your work, it helps preserve your thinking, reduces friction, and makes it easier to return to your research after time away.

Organization as Infrastructure

Organization is best understood as infrastructure. Like bridges or roads, it supports thinking and movement of information. A well-designed system helps you find what you need, pick up where you left off, and continue working without having to recreate effort.

The goal of organization is not neatness or perfection. The goal is to support your thinking and decision-making over time.

The Organizing Process Loop

Think → Plan → Prioritize → Act → Results → Evaluate → Repeat

This process loop (see fig. 1) provides a flexible framework for both research and organization. It applies to:

- defining research questions,
- making organizing decisions,
- and shaping workflow.

The loop is cyclical, not linear. You return to it repeatedly as your research evolves, your life changes, or new information comes to light. There is no expectation that you move through it once and finish.

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The Organizing Process Loop

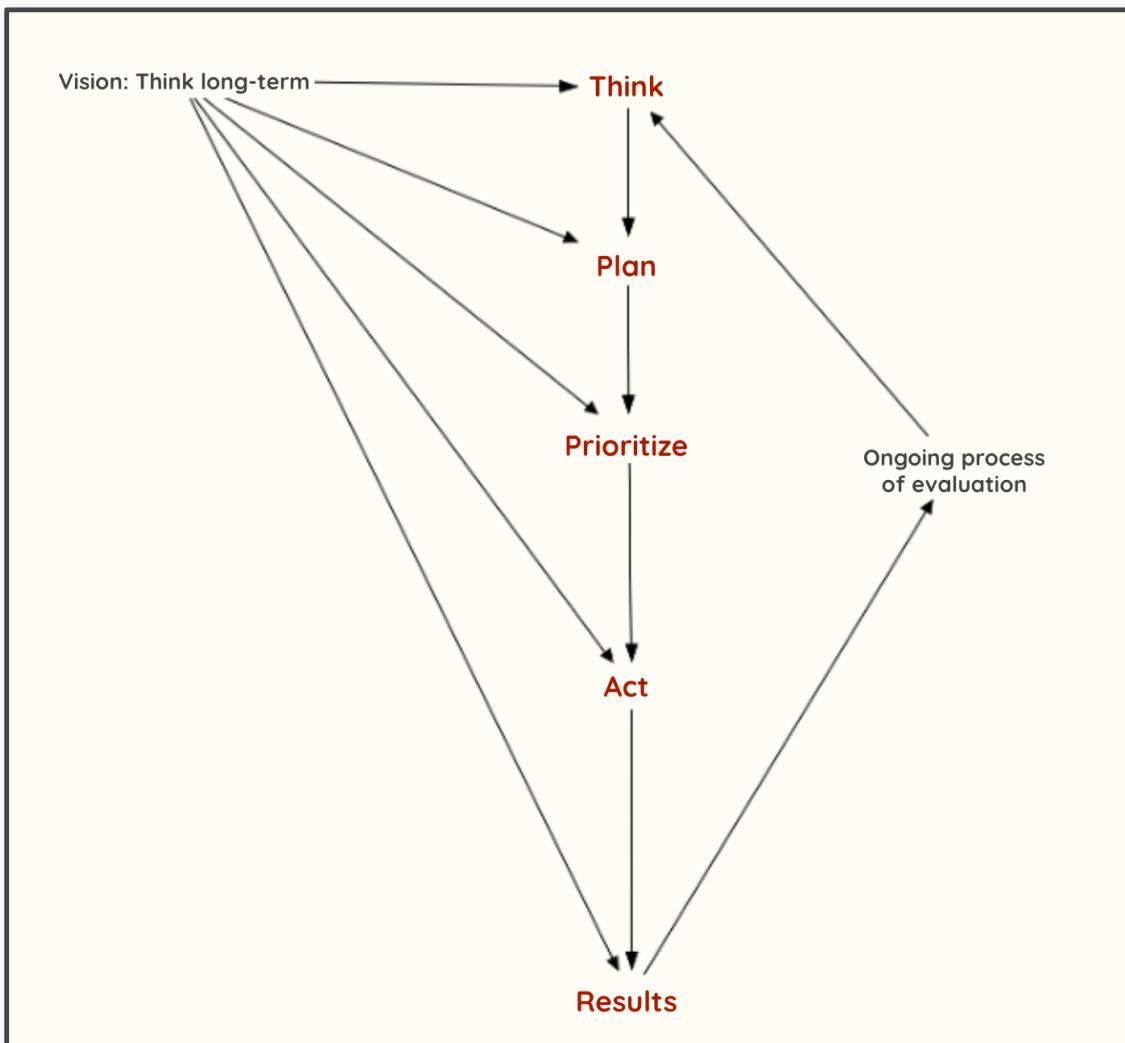


Fig. 1.

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ORGANIZING YOURSELF (THINK)

Organizing Begins with You

An organizing system is shaped by how you think, work, and live. When a system fails, it is usually because of a mismatch between the system and the person using it rather than because of lack of effort.

Before choosing tools or structures, it is worth reflecting on your own habits, preferences, and constraints. A system that aligns with your reality is far more likely to last.

Self-Management vs Time Management

Time is fixed. Energy, focus, and attention are not. Sustainable research depends more on managing yourself than managing time.

When you organize with self-management in mind, you are better able to make choices that support consistent, meaningful work.

There is No Right System, Only Whether a System is Right for You

There is no “correct” way to organize genealogical research. Different people think and work differently, and systems that work well for one person may not work for another.

You can learn from others, but to create a successful system, borrow ideas that you think would work for you and then adapt them to fit your system. Flexibility and fit matter more than following someone else’s model exactly.

Habits Support Systems

Systems rely on small, repeatable actions. If a system requires constant effort or attention, it will be difficult to sustain over time.

Consistency matters more than perfection. Simple routines that fit naturally into your life are more effective than complex systems that require ideal conditions to function.

Reflection

- What helps you return to your research after time away?
- Where does your current system support you, and where does it add friction?

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ORGANIZING YOUR SYSTEM & WORKFLOW (*PLAN* → *ACT*)

The Nature of an Organizing System

An organizing system helps you store information, retrieve it when needed, and return to your work easily after time away. It supports thinking and the research process.

A system is not about aesthetics, nor is it a permanent solution. It is functional and changes as your research and circumstances change.

Designing a System for Retrieval and Returnability

When evaluating your system, consider these core questions:

- Can you find what you need when you need it?
- Can you stop and restart your work easily, picking up where you last left off?

Returnability is especially important in genealogy, where research is often interrupted by life events, responsibilities, or long gaps between sessions.

Workflow: How Work Gets Done

A system holds information; workflow moves it. Workflow is where your intention becomes action.

Understanding how you move from thinking to doing helps you design systems that support your work.

Research Sessions as Containers

Research sessions benefit from having a beginning, middle, and end. Containment helps prevent overwhelm and fatigue and makes it easier to return to your research later, regardless of how much time has passed.

Clear stopping points protect energy and help preserve clarity, even when research questions remain open.

Capturing Results

You cannot hold genealogy in your head. Notes, logs, summaries, and other records preserve your thinking over time.

Capturing results supports analysis, prevents duplication of effort, and builds confidence in your research process.

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VISION, PARAMETERS & SUSTAINABILITY

Why You Research (*VISION*)

Vision is clarity about why this work matters to you. It does not need to be formal or fixed. It is part of the “Think” stage of the process loop and informs how you approach research and organization.

When you are clear about why you research, it becomes easier to make decisions about what to focus on and what to set aside.

Big Focus and Small Goals

Your big focus grows out of your vision. It helps you decide what matters most in your research right now.

Small goals support that focus by directing and containing your work. Together, focus and goals reduce overwhelm by narrowing choices rather than expanding them.

Parameters as Protective Boundaries

Parameters help you decide what you will and will not spend time on, both in your research and in your life. They are not about limiting your research. Clear parameters protect your research by protecting your time and energy. They help prevent research from spilling over in ways that lead to frustration or burnout. Parameters keep the research enjoyable and sustainable.

Evaluation and Returning to the Loop

Evaluation is an act of curiosity rather than one of judgment. It is an opportunity for you to notice what is working, what is not, and what you may need to change.

As life and your circumstances change, returning to the process loop allows you to realign your system, workflow, and goals with your vision.

Start small. Adjust often. Trust yourself.

This framework is designed to help you make organizing decisions that support both your research and your life. Tools can support the work; clarity helps you choose them wisely.

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ORGANIZING YOURSELF

IDENTITY LENSES & GENEALOGICAL RESEARCH — QUICK GUIDE

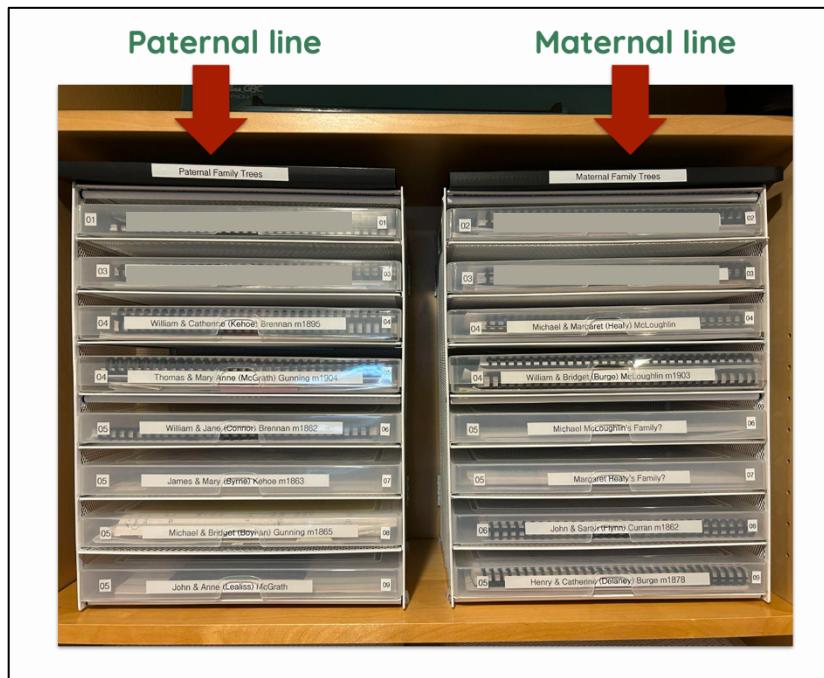
Use this quick scan to notice patterns in how you approach genealogical research. These lenses describe tendencies, not fixed traits. You may identify with more than one.

Lens Pair	You May Lean This Way If You...	Common Genealogy Behaviors
Opener / Finisher	Enjoy starting ideas OR enjoy closing loops	Start many questions vs. finish analyses and citations
Familiarity / Novelty	Prefer trusted methods OR new tools	Reuse known repositories vs. explore new databases
Promotion / Prevention	Chase discovery OR guard against error	Speculate freely vs. document carefully
Small Steps / Big Steps	Prefer incremental work OR immersion	Short research sessions vs. long research sessions
Effectiveness / Efficiency	Value accuracy OR speed	Deep analysis vs. streamlined workflows
Lark / Owl / Hummingbird	Have predictable or variable energy	Morning vs. evening research vs. flexible timing
Marathon / Sprinter (vs. Procrastinator)	Work steadily OR in bursts	Consistent logs vs. deadline-driven surges
Simplicity / Abundance	Prefer minimal OR visible resources	Clear desks vs. many materials at hand
Filer / Piler	Organize by layered structure OR by grouped paper	Folders & files vs. visual stacks
Underbuyer / Overbuyer	Hesitate to buy OR buy to solve	Delay tools vs. accumulate subscriptions
Competitor / Cooperator	Motivated by benchmarks OR community	Solo goals vs. study groups
Introvert / Extrovert / Ambivert	Recharge alone, with others, or both	Solo research vs. discussion-based work

The goal is not to change who you are, but to design an organization system that works with your natural tendencies.

ORGANIZING YOUR SYSTEM

PAPER SYSTEM – PILING (Paper Piles)



Piles are often working papers in progress, not clutter waiting to be filed and disciplined. When designed intentionally, piling can be a practical and effective organizing structure. It is an entirely valid way to organize your genealogical work.

Pros of Piling:

- Quicker and easier accessibility
- Visual cue for tasks and documents that need attention
- Almost immediate access to frequently used items
- Flexible organization for prioritizing - easy to place a document anywhere in the pile assigning it a priority rating by its location in the pile
- Easier to purge documents from piles versus files

Cons of Piling:

- Can lead to clutter
- Difficulty finding documents if not managed carefully
- Subject to others “tidying” your system
- Negative judgments: unprofessional/disorganized

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ORGANIZING YOUR WORKFLOW

THE RESEARCH ROUTINE

