

Genealogy Do-Over – Step 8

Topics: 1) Conducting Collateral Research and 2) Reviewing Offline Education Options

Conducting Collateral Research

Many people confuse collateral research with cluster research, or they tend to lump them together. For me, collateral research involves the collateral lines connected to your direct line ancestors. Most times this would mean focusing on the relatives of someone who married into the family – the wife or husband’s parents, siblings etc. It also can mean distant cousins along your direct line. Also, don’t forget those second and third marriages and step-children.

My definition of Collateral Research: A search for those who are not direct line ancestors, but who are considered part of the same family. These include siblings, half-siblings, in-laws and others through marriage. Example: take time to look at the siblings of a woman’s husband or her husband’s parents and who they married, as well as their children.

1. Start out with a direct line ancestor.
2. Spend time researching that person’s spouse, including parents and siblings.
3. Record as much information as possible, no matter how insignificant it may seem. Include occupation, address, and other details.
4. If needed, branch out with research on the siblings and other non-direct relatives.

Reviewing Offline Education Options

You have likely heard the term “not everything can be found online” when it comes to records and genealogy research. The same holds true for genealogy education. There are several large genealogy conferences as well as week-long intensives better known as “institutes” offering a chance to learn from nationally known educators and genealogists.

UPDATE: During the COVID-19 pandemic, many in-person genealogy conferences and institutes have moved to a virtual, online platform. For 2022, some of these events, including RootsTech, will continue as online events. And some will transition back to “in-person” events. And some will provide a “hybrid” experience with both in-person and online options available.

Over the past five years, several new institutes have popped up and I believe this will continue over the next few years in the genealogy field. Genealogists realize the value of working in a collaborative environment with other researchers and being able to network with others in person. There are some aspects of the institute concept that just can’t be replicated online!

Review the list of large genealogy conferences and institutes in the United States and make plans to attend one or more. Visit **Conference Keeper** at <https://conferencekeeper.org/> for the latest, up-to-date information on virtual and in-person genealogy education opportunities.

Step 8 To Do List – Full Do-Over Participants

- **Conducting Collateral Research:** While some researchers prefer to work on an entire family as a “group,” meaning parents and children, others “loop back” once they’ve work on all the parents and grandparents. No matter which approach you take, remember to utilize the research and evidence evaluation skills you’ve acquired over the previous steps of The Genealogy Do-Over.
- **Reviewing Offline Education Options:** Review the list of available conference and institutes at Conference Keeper. Also, consider local genealogy conferences and attending local genealogy society meetings.

Step 8 To Do List – Review or “Go-Over” Participants

- **Conducting Collateral Research:** Those doing a “go-over” will want to review the children for each set of parents and look for missing children, other spouses, and verify all information such as birth dates, locations, marriages, etc.
- **Reviewing Offline Education Options:** Review the list of available conference and institutes. Also, consider local genealogy conferences and attending local genealogy society meetings.