

Genealogy Do-Over – Step 9

Topics: 1) Conducting Cluster Research and 2) Organizing Research Materials – Documents and Photos

Conducting Cluster Research

In Step Eight we covered Collateral Research, which focused on siblings, in-laws and others considered to be within the same extended family. Cluster Research is different and is a large portion of the F.A.N. Club concept as put forth by Elizabeth Shown Mills (see [QuickLesson 11: Identity Problems & the FAN Principle](#) at the Evidence Explained website for an excellent overview of the concept).

Here is the definition of Cluster Research that I use for my own research: When you research the friends, associates, and neighbors (aka F.A.N. club) who were part of the community of your direct line ancestors. Most times this means focusing on the geographical area where your ancestors lived or the locales from and to which they migrated.

Your Ancestors Had a Network

The saying “No man is an island,” holds true when it comes to the daily lives of our ancestors and probably more so than daily life in the 21st century.

Understand that when a person or a family arrived in a new country, city, or town it was likely that they already knew someone there. This may have been a relative or a friend of a relative. They may have been connected to the same hometown or same ethnic group in the Old Country. Our ancestors didn't just pick up and leave on a whim to settle down in a place that was unfamiliar.

When arriving in a strange place it was comforting to have some connection, something that was familiar be it language, religious belief, or occupation. This made the transition easier and helped the person build a network upon which they could rely when needed.

Finally, if someone strange did arrive in a small town or even a city neighborhood, it was likely the townsfolk or neighbors wanted to know the following:

- Who were they?
- Where did they come from?
- Why were they here?
- What do they intend to do here?
- What are they bringing with them?
- What are they leaving behind?

In many places, for a town to survive, it was vital to find out this information and determine if this new person or family was a good fit.

Best Practices for Cluster and Collateral Searching

- **Always use a research log.** Make sure you enter your finds in a research log, no matter how insignificant they may seem at the time. Remember, you are looking for data that will indirectly provide clues to your direct lines.
- **Formulate theories . . . and write them down!** How often have you contemplated certain theories about your research, only to forget them later? Make sure there is a “Possible theories” or “Notes” section in your research log. You’ll find it easier to recall those ideas later if you enter them right away.
- **Spelling counts!** However, not in the way you expect it to . . . Make sure you are employing spelling variations when conducting each search. Surnames changed over time.
- **Stop relying on records that are indexed.** The indexing process is not perfect and if you rely solely on your ability to find information through a search, you can’t conduct effective collateral or cluster searches.
- **Try swapping given and middle names.** For many different reasons, individuals may have used different names at different times in their life. Search based on both given and middle names and search using different orders.
- **Search by address.** You might be surprised at who lived at a particular address before or after your ancestor was there.
- **Leave no stone unturned.** Be dedicated in your search efforts to perform a “reasonably exhaustive search.” If you don’t, you’re only shortchanging yourself.
- **Search without boundaries.** Make sure you are searching over that county or state line if an ancestor lived in an area close to a border.

Easy-peasy, right? Again, it takes practice and over time you’ll remember all the little tricks of performing effective cluster searches.

Organizing Research Materials – Documents and Photos

Since we’re on the “down slope” of The Genealogy Do-Over, it is likely that you’ve accumulated physical items in your research such as documents, vital record certificates, photos, etc.

While next month we will focus on how to keep digital items organized, let’s talk about using folders, binders, filing cabinets and the like. First, I need to admit that I have a strong bias towards digital . . . to the point where I’d rather have a PDF or scan an item than have a paper version. Nevertheless, there are some items that are irreplaceable in their original form so organize we must!

Best Practices for Organizing Genealogy Items

Here are some guidelines I follow when organizing my paper materials:

- **Think preservation as well as access.** I try to focus on not just organizing items and making them easier to find, but also ensuring that they will endure. That means using sound archival practices such as the proper materials to store photos, negatives and other items. Check out the resources here at Abundant Genealogy in the bi-weekly column **The Archive Lady** (<https://genealogybargains.com/tag/the-archive-lady/>) by Melissa Barker. Melissa offers great advice on the ins and outs of archiving and preserving items.
- **Select a system that works for you.** Don't employ an organization method that you won't stick with especially when it comes to maintenance. Review the various methods that other genealogists use and pick one that's right for your research habits OR select elements from several methods and create your own.
- **Schedule maintenance time.** Use a calendar (paper or online) and block out one or two hours a month to do nothing but tidy up your genealogy materials.
- **Do I really need that item?** A huge part of organizing for me is "curating" which means being selective in what to keep and what to discard. For old genealogy magazines, I just don't have the space anymore to store them. And it is easier for me to search my computer for that article I need than to leaf through magazine issues. So, I've scanned the articles that I want to keep and toss the original. Better yet, when I subscribe to a magazine, I opt for the digital version. For books, I can scan them and then donate them to my local genealogy or library.

Resources

Here are some resources that I recommend when anyone tells me they need to get their "genealogy cave" organized!

- **The Organized Genealogist** is a group of over 40k genealogists on Facebook discussing ways to organize their genealogy materials. Lots of collaboration and discussion as well as people generously sharing their tips and resources. (<https://www.facebook.com/groups/363709160397822>)
- **Organize Your Family History** is run by blogger Janine Adams and uses the byline "Stay focused and happy while exploring your roots." This site is filled with helpful information from a professional organizer who happens to also be an amateur genealogist. (<http://organizeyourfamilyhistory.com/>)
- **Cyndi's List – Organizing** offers links on every conceivable sub-topic related to organizing your genealogy materials: bookmarks, supplies, gadgets, etc. (<http://www.cyndislist.com/organizing/>)

Ready to get organized? I realize that you can't simply organize all your genealogy material in a day, but with the knowledge and resources above, here's what you can do: create projects and tasks for your To Do List and tackle them little by little.

Step 9 To Do List – Full Do-Over Participants

- **Conducting Cluster Research:** Like me, you may not be ready for cluster research. However, if you do reach a stopping point, make sure you have the cluster research knowledge and materials handy to work through your ancestor's F.A.N. club connections!
- **Organizing Research Materials – Documents and Photos:** Think of getting organized as an investment: why would you spend years doing research if at some point you couldn't locate what you've discovered? Set aside those crucial one to two hours a month and commit to a plan to get organized.

Step 9 To Do List – Review or “Go-Over” Participants

- **Conducting Cluster Research:** It is very likely that you have some dead ends, roadblocks or whatever you want to call them in your past research. Try taking one person for whom you can find no real information and identify their F.A.N. club connections. Use clues from records such as census sheets to find their occupation, their native country, their native language etc. Start slow and small
- **Organizing Research Materials – Documents and Photos:** Organizing what you have can be a HUGE undertaking. Review the resources above and don't forget that there are professional organizers who can help!

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