The Genealogy Do-Over™:
A Year of Learning from Mistakes

Thomas MacEntee, of High-Definition Genealogy
http://hidefgen.com   hidefgen@gmail.com

In late December 2014, after almost a year of planning, I decided to toss out more than 20 years of genealogical research and start over. That's right . . . I hit the reset button. I decided to go "all in" and allow myself to have a Genealogy Do-Over.

The Seven Deadly Sins of a Sloppy Genealogist – A Learning Opportunity

In case you think I developed this hair-brained scheme on a whim, you should know that I did a "dry run" over the course of several months. I started by reviewing my current research and closely looking at

- Not developing a plan for finding ancestors
- Not following standards
- Not tracking my research and what records I already used
- Not citing sources and noting where I found information
- Not discriminating between good records and unreliable records
- Not keeping my paper and digital files organized
- Not sharing my research responsibly with others

Confessing My Sins and Committing to a Better Way

Here is the short summary of the **Genealogy Do-Over**: I plan to set aside everything related to my genealogy research including notebooks, papers, and even digitized files and my genealogy database files and START OVER.

Since I started my initial research, much has changed in the areas of genealogy research methodology and education. I now realize the need to collect facts and track them properly, including the use of source citations. I now understand the process of analyzing evidence and proving facts to reach a conclusion. In essence, I know a lot more about the "process" of genealogical research and I want to put it to use.

This is not to say that I haven't been following proven guidelines when it comes to finding family history. For my research clients (mostly pro bono), I actually employed all the methods that I advocate and advocated by many in the genealogy community. However, currently when it came to my own research, I'm was not walking the walk, I was just talking the talk.

And it isn't always easy to "walk backwards" and review each and every bit of information gathered over the years. Now, I want to do more than re-walk a trodden path: I want to head out from the same starting point, but see where the journey takes me this time. I'll have better tools, better knowledge and be better equipped for each twist and turn. I encourage you to join me on this journey.

The **Genealogy Do-Over** journey is constructed of 12 mileposts or journey markers which I've laid out over 12 months. You can choose to pace yourself differently, such as over 12 two-week periods or 12 weeks. You can even decide to drop some of the less important tasks and add your own. Do whatever it takes to ensure that you are on firm footing to finding your ancestors.

A short synopsis of my planned route (see **Genealogy Do-Over Topics** below for more details):

- Take inventory, box up most physical items and set everything aside.
- Move all digital files into a HOLD folder.
- Gather tools to research.
- Set research goals.
- Start with my own knowledge and write it down.
- Start tracking research.
- Interview family members.

And then week by week, continue research and add more and more skills and areas of focus including citing sources, tracking searches, building a research toolbox, creating an educational plan, researching offline as well as online, and more.

By the end of the 12 months – or 12 journey markers – I hope to have covered what I see as a firm foundation in genealogy and family history research. I realize that some focus areas may differ; anyone along for the journey has the freedom to add or remove content. This program has to work <u>for</u> you and not something that you dread each week or that you find you are working <u>against</u>.

The Seven Successful Virtues of a Reborn Genealogist

As I developed the Genealogy Do-Over, specific areas of skillbuilding became evident:

Creating a Genealogy Plan

Whether it is on paper, in a digital document or even using your favorite genealogy software, create a road map for your search. Before I started using a To Do List, here is how I would search: Hop on Ancestry or another genealogy site, go from record to record or follow some "shaky thing" and the next thing I knew . . . three hours had gone by with no results.

Having a research plan not only keeps you focused, but also can act as a "catch basin" for new search ideas when they pop into your head. No more wild goose chases!

Embracing the Genealogical Proof Standard

The Board or Certification of Genealogists® has developed the Genealogical Proof Standard as a set of guidelines for sound genealogy research. I plan to study the elements below and employ them whenever possible in my new research:

- Reasonably exhaustive search
- Complete and accurate citation of sources
- Analysis and correlation of the collected information
- Resolution of conflicting evidence
- Soundly reasoned, coherently written conclusion

Using a Genealogy Research Log

Tracking my research will be important especially if I want to make the most of my offline visits to repositories or use of online resources. Each fact or relationship I want to prove will be logged in a spreadsheet. I should be able to tell which resources I've already used and easily return to my research even after several weeks or months.

Citing Your Sources – It's Not as Scary as You Think

When I first learned about source citations, I didn't believe they were necessary. I thought they were a waste of time. Since I was only doing "hobby genealogy," why would I need to prove where and when I found information?

Over time, I realized why it is important to cite sources:

- **Establish Proof**. Cited material gives credibility to a fact or relationship while proving a connection.
- **Determine Reliability of Evidence**. Some sources are more reliable and make a stronger proof. Compare points of evidence based on their source.
- **Track Records and Resources**. Easily go back and locate records and their repository. This is effective when the original record or a copy is lost.
- **Expand Research**. When encountering a difficult area of research, look for sources that were successful in making a proof and check them again for further information.
- **Discover Conflicts**. Locate contradictions in existing research or when new evidence is found.
- **Understand the Research Process**. When using another researcher's work, sources can give a glimpse at how that research was developed.
- **Placeholders**. Pick up a research project where you left off by looking at source citations.

Learning the correct way to cite sources was not difficult and there are plenty of resources and even templates in genealogy software programs to speed up the process.

Analyzing Data Before Using Data

Another research mistake resulting in unstable trees filled with questionable and unproven branches: my refusal to really look at the data I was gathering. I didn't discriminate when it came to my finds: If a name was in a book without sources, it went into my family tree. If an ancestor was on someone else's online tree, it went into my family tree. I was a genealogy data hoarder.

My plan now is to look at each document and each bit of information and determine whether or not it proves or disproves each research question.

I will be using the *Skillbuilding: Guidelines for Evaluating Genealogical Resources* by Linda Geiger as a means of analyzing research data.

- **Source Type**: A source is **Original** if it is the first written statement, photograph, or recording of an event. Subsequent copies are **Derivative** and may be reproduced by hand, machine, camera or scanner; they may be reproduced on paper, in microform, as photographs or digital images, or in any other medium that records the image whether transcribed by hand or technology.

- **Clarity**: Use **Clear** if the information can easily be read. Use **Marginal** if information is not clear, is partially obscured and researcher must "guess" at words or letters.

- **Information Type**: Use **Primary** if a piece of information is recorded by a knowledgeable eyewitness or participant in that event, or by an official whose duties require him or her to make an accurate record of the event when it occurs. Use **Secondary** if information is supplied by someone who was not at the event and may include errors caused by memory loss or influenced by other parties who may have a bias or be under emotional stress.

- **Evidence Type**: **Direct** evidence is any fact that is explicitly stated. **Indirect** evidence is inferred from one or more pieces of evidence within the record.

Capturing and Organizing Content

Not only were my paper files and binders extremely disorganized, but I had no file naming convention for digital files. I had been spending untold hours just looking for my own resources! And I could have spent that time trying to find my ancestors!

So now I plan on spending some serious time organzing <u>before</u> I even start researching!

Sharing Your Family History Finds

And finally, my practice of sharing what I found needed some work too. When I started out, I was too possesive of my research and only shared in exchange for something in return. While my views have changed greatly over the past few years, now with the new research not only will I act as a steward or caretaker for my family history, I also need to "future proof" my years of research so that it lives on after I'm gone.

Staying the Course and Moving Forward

I'll admit that a Genealogy Do-Over is a huge undertaking. It is a big step and not for everyone. I've structured this educational journey in such a way that any genealogist, whether a beginner or a veteran, can imrpove their research habits.

Consider using the resources below simply to learn more about the Genealogy Do-Over. Join some of the groups and take part in discussions or perhaps even share resources. Ask questions and look for answers. With more knowledge comes the power to improve your genealogy research and to learn more about your ancestors.

Genealogy Do-Over Topics

Genealogy Do-Over – Month 1

- Setting Previous Research Aside
- Preparing to Research

Genealogy Do-Over – Month 2

- Establishing Base Practices and Guidelines
- Setting Research Goals

Genealogy Do-Over – Month 3

- Conducting Self Interview
- Conducting Family Interviews

Genealogy Do-Over – Month 4

- Tracking Research
- Conducting Research

Genealogy Do-Over – Month 5

- Citing Sources
- Building a Research Toolbox

Genealogy Do-Over – Month 6

- Evaluating Evidence
- Reviewing Online Education Options

Genealogy Do-Over – Month 7

- Reviewing Genealogy Database Software
- Digitizing Photos and Documents

Genealogy Do-Over – Month 8

- Conducting Collateral Research
- Reviewing Offline Education Options

Genealogy Do-Over – Month 9

- Conducting Cluster Research
- Organizing Research Materials – Documents and Photos

Genealogy Do-Over – Month 10

- Reviewing DNA Testing Options
- Organizing Research Materials – Digital

Genealogy Do-Over – Month 11

- Reviewing Social Media Options
- Building a Research Network
- Reviewing Research Travel Options

Genealogy Do-Over – Month 12

- Sharing research
- Securing research data

Resource List

- **Genealogy Do-Over: Schedule of Topics**
  http://www.geneabloggers.com/the-genealogy-do-over-2016-topics/

- **Genealogy Do-Over - Facebook Group**
  https://www.facebook.com/groups/genealogydoover/

- **Genealogy Do-Over – Latest Articles at GeneaBloggers**
  http://www.genealogydo-over.com

- **Genealogy Do-Over – Resource List**
  http://www.bagtheweb.com/u/genealogydo-over

- **Genealogy Do-Over – Pinterest Resource Board**
  http://www.pinterest.com/geneabloggers/genealogy-do-overtm/

- **Evidence Explained**
  https://www.evidenceexplained.com/

- **The Genealogical Proof Standard**
  http://www.bcgcertification.org/resources/standard.html

Genealogy Research Log Templates

- **Excel Version – Genealogy Research Log**
  http://www.geneabloggers.com/genreslog

Articles & Books

- ***Skillbuilding: Guidelines for Evaluating Genealogical Resources***
  http://www.bcgcertification.org/skillbuilders/skbld085.html

- ***Genealogy Standards: 50th Anniversary Edition***
  http://www.geneabloggers.com/genstandardslegacy

- ***Mastering Genealogical Proof***
  http://www.geneabloggers.com/mastergenprooflegacy

- ***Evidence Explained: Citing History Sources from Artifacts to Cyberspace***
  http://www.geneabloggers.com/eelegacy