

Genealogy Goals for the New Year

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With the coming of a new year, many of us reflect on the past year. What did you set out to accomplish with your genealogy research? Did you succeed? Did you come up short? Too often we wallow in our regrets and focus only on our failures. This coming year, why not set reasonable goals to advance and expand your family history research? Learn how to start and complete tasks in these key areas of genealogy research: organization, workflow, information, methodology, education, and legacy.

Setting Reasonable Genealogy Goals

It is an annual tradition, isn't it? Each January 1st we set these lofty goals to change bad habits or to find success and then that train falls off the rails. The same happens with genealogy goals, and why? Because we plan big and think we can only act big. A big goal is made up of tiny goals, small achievements, and little steps.

Instead of saying "I want to finally produce that family history book based on my years of genealogy research," why not do this: "I want to create a small book based on the life of my grandfather." You can include your research data, family photos, stories, and more. Then once completed, you will have a new skill set under your belt and you can move on to either another small book or a larger project.

Think modular like a child's set of building blocks. Each one connects to the other ... string a few small family history books together and guess what? You get that big family hisstory book that you always wanted!

Survey: What Works and What Doesn't Work?

If I were to ask you: "What were your genealogy successes in the past year?", could you tell me without looking at your files or genealogy database? What did you set out to do?

I bet that off the top of your head you can think of a few things, but you probably have left quite a bit out, right? Here's a tip: your best genealogy goal for the new year should be **TRACKING YOUR GENEALOGY PROJECTS** and **RESEARCH!**

So here I am giving you more work already, but I speak from experience. As a project manager in my former corporate job and from over forty years of doing genealogy. How do you know where you are going if you don't know where you've been?

Use a tracking tool that works for you! Check the **Resource List** below and consider free online programs such as **Trello** or **Evernote** or old-standby programs such as **Excel** or **Google Sheets**.

Focus Areas

So once you have done a thorough review of your past year's genealogy successes and failures, what you were able to finish, partially complete, or just couldn't start? Most likely they can be categorized in one or more of these focus areas below. For each focus area, review suggested resources and set new goals for the coming year!

Organization

- **Clean your workspace.** This means a thorough organizing of your genealogy cave. Review items, file papers, organize. Scan and digitize what you can. Discard what you don't need. A clean workspace means less time searching for "stuff" and more time searching for ancestors.
- **Paper vs paperless.** I am almost totally PAPERLESS when it comes to my genealogy research. The only physical items I keep are old letters, diaries, bibles, photos, and maybe vital record certificates I have ordered. Everything else is digital. Consider scanning those items that take up too much space.
- **Organization system.** What are the best ways for you to access what you need when you need it? Binders? Folders? Consider an organization system that is not too difficult to set up and is easy to use and maintain. Remember, if you go paperless you won't need many of these items.
- **Clean your digital workspace.** It is easy to get buried in your digital workspace too. Is your computer screen filled with shortcut icons? Are your genealogy record downloads renamed and organized in folders? Again, time spent trying to "find" stuff on your computer means less time for research.

Workflow

- **What's your process?** If you told me step-by-step how you research a new person for your genealogy, what are the steps? Do you have processes for research, data entry, filing, downloading, scanning? Think of a "recipe" and write down the steps. See if you can make improvements to be more productive.
- **Shortcuts and templates.** Over time you realize you might be doing the same task over and over when researching. Can you create shortcuts or templates that can help speed up a process?
- **Create a genealogy research toolbox.** I have a habit of finding a neat online website or tool for my genealogy, then I forget to add it to favorites or bookmarks. Create an online "toolbox" where you can quickly add resources and have them available when needed. It can be as basic as just organizing your bookmarks or creating a spreadsheet.

Information

- **How do you capture information?** The amount of information available online for genealogy research is astounding and grows exponentially each year. How do you find, access, consume, and save new information? Just like the workflow focus area above, write down the process. Where is there room for improvement? Consider automating how you get alerted to new information, save items for later review, and then adding information to a to-do list.

Methodology

- **Do you use the GPS?** If you don't use the **Genealogical Proof Standard (GPS)** as set forth by the Board for the Certification of Genealogists® (BCG), it is time to get serious about your genealogy research. The GPS is easy to understand and deploy. In doing so you'll be rewarded with more research success.
- **Do you cite your sources?** Many think citing sources for records and artifacts is only for professional genealogy research. Not true. With practice you can create a basic source citation for any evidence in less than one minute.

Education

- **Just in time training.** Simialr to a genealogy research toolbox, create a list of "go to" genealogy education resources to get up to speed on a new record set or concept. Use a format that works for you ... a wiki, a PDF, a print book. Again, organize your education tools and keep them handy.
- **How do you learn new concepts?** We all learn differently. I'm a visual learner with a short attention span. I prefer an online knowledgebase and short videos. Find out what works for you and add to your list of educational resources.
- **Continuing education.** Also be in a mode of learning and always be curious. Set aside an hour or two each month to just explore and find new information related to your research.

Legacy

- **How's your digital footprint?** Many Baby Boomers like me don't realize that we've left a huge "digital footprint." We've created online family trees, set up social media accounts, etc. What will happen to these accounts once you pass on? Put together a plan to make sure your digital legacy is preserved as well.
- **Artifact and heirloom preservation.** Right now, if your home were lost to fire, flood or some other disaster, would you be able to save your precious family heirlooms? Consider a project to digitize and scan photos, slides, negatives etc. and convert home movies to digital. Label each item and discuss with family members who will inherit these items once you've gone.
- **Future proofing and successorship.** Using both topics above, put together an action plan to make sure your years of genealogy research is not wasted. Make sure you backup all your digital data. Secure your photos and heirlooms. Leaving a legacy with your genealogy work depends upon your actions today!

The Next Step?

The next step in setting solid genealogy goals for the coming year is all in your hands. With the information above and the resources below, you have everything you need to get started. Be brave, be actionable, and be responsible when it comes to your genealogy research and leaving a legacy. Your family and descendants will thank you.

Resource List

- **Donating Your Personal or Family Records to a Repository**
<https://www2.archivists.org/publications/brochures/donating-familyrecs>
- **Evernote**
<https://www.evernote.com>
- **Evidence Explained**
<https://www.evidenceexplained.com/>
- **FamilySearch Wiki**
https://www.familysearch.org/wiki/en/Main_Page
- **Genealogical Proof Standard**
<https://bcgcertification.org/ethics-standards/>
- **Genealogy Research Log – Excel**
<https://genealogybargains.s3.amazonaws.com/TEMPLATE+Genealogy+Research+Log.xlsx>
- **Google Alerts**
<https://www.google.com/alerts>
- **Google Drive – Google Sheets**
<https://www.google.com/drive/>
- **Google Workspace**
<https://referworkspace.app.goo.gl/oCax>
- **How to arrange for your digital legacy**
<https://www.theverge.com/22812264/digital-legacy-death-estate-google-apple-how-to>
- **Microsoft Office 365 Personal**
<https://genealogybargains.com/ms365personal>
- **MyHeritage Knowledgebase**
<https://education.myheritage.com/>
- **Organize Your Family History**
<https://organizyourfamilyhistory.com/>
- **The Organized Genealogist**
<https://www.facebook.com/groups/363709160397822>
- **Trello**
<https://trello.com/hidefgen/recommend>
- **What's In Your Genealogy Research Toolbox?**
<https://www.youtube.com/watch?v=OUoTtSVrPBs>