



Jigsaw Genealogy:

Keepers, S.T.U.F.F. & Ben Franklin

Presented by Kim Alberg

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The Four Corner Pieces

1. Establishing the FRAME – What exactly needs organizing?
2. Looking at the BIG PICTURE – What are our KEEPERS and what is just S.T.U.F.F.?
3. Working the DETAILS – What other organizational elements need addressing?
4. Troubleshooting the CHALLENGES – What issues should we anticipate?

Part 1. FRAME: Things to Organize

- Biographical data (names, dates, places, relationships), forms
- Support documents, records
- Photos, correspondences, knickknacks/heirlooms
- Resources (both print & electronic), professional contacts
- Client files, business documents
- Thoughts & plans for future research
- Storage devices, flash drives, binders
- *“For every minute spent in organizing, an hour is earned.” Benjamin Franklin*

Part 2. THE BIG PICTURE – Sorting the Keepers from the S.T.U.F.F.

- Keepers – evidence/support documents, items kept for convenience or for intrinsic/sentimental value
- S.T.U.F.F. – Sitting There Unused, Forgotten Forever (or For now)
- Sort the Keepers from the S.T.U.F.F. by answering these questions:
 - Does the item fit any of the three (underlined) “Keeper” criteria above?
 - If the item is a duplicate of one found in another file, could it be cross-referenced or noted on a research log and then discarded?
 - Would this S.T.U.F.F. item be a Keeper if processed/organized differently?
 - If I PURGE this item, will I regret the decision later? What’s the potential loss?
- Examples: *Family Tree Magazine* – “Family History Stuff: Keep or Toss Checklist”.
<https://familytreemagazine.com/wp-content/uploads/2021/09/family-history-papers-keep-or-toss-checklist.pdf>
- *“Clutter is nothing more than postponed decisions.” Barbara Hemphill*

Part 3. DETAIL PIECES – Other Organizational Elements and Tips to Consider

- END GOAL: Find “It” Fast!
- First things first – Decide between hardcopy (paper) files, digital storage, or a combination of the two

	PRO	CON
Hardcopy	Easier to view multiple items simultaneously, comfortable (?)	Requires more physical space
Digital	Computer searchable/findable, can be enlarged for viewing	Requires access to a device
Both	(see above)	Now you have 2 places to look for something

- Folders. Typical organizational systems include:
 - Research folders – records & documents, forms, research notes, photos, correspondence, etc.
 - If filing by ancestral surname, choose between folders for individuals and/or couples
 - Example: Ahnentafel System – folders align with numbers on ancestor/pedigree chart
 - Page 1 in folder = Ancestor Chart, used as a table of contents/guide to the (Ahnentafel) labelling system used to sequence items within the folder
 - Surnames included in folder listed on OUTSIDE of folder
 - Originals: make “mark-up” copies of original documents, photos, and correspondence, annotating/highlighting the copies for quick review of key facts; preserve the originals in acid-free top-loaders
 - Consider creating a log of these originals that notes how you got them
 - Reference materials – info on locations, “how-to” topics
 - Professional contacts – client/business files, correspondence with professional genealogists
 - Other – Perhaps a “To Be Filed Soon” file? 😊
 - Digital folders – Mirror hardcopy folder organizational system if possible
 - Make choices that are logical (to you) and that you can consistently follow!
- Naming Digital (Computer) Files. File names should:
 - Identify their contents (*before* you open them), and
 - Auto-sort the way YOU want to use them
 - Example - PATT – Alexander Patterson 1865 probate – FHL 915208.503 (film.img)
- Heirlooms. Care for the family treasures entrusted to you by...
 - Cataloging/documenting each item along with its description, approximate date/age, its original owner, how it came to you, and other known details
 - Safely storing/displaying items away from MALT (Moisture, Acid, Light, Temperature) extremes
 - Avoiding overhandling and mishandling (tape, ink, goo)
 - and by SHARING THEIR STORIES with the next generation!!!
- Forms. Forms are key to documenting what you have ... and identifying what you still need to find!
 - Research forms – use to record what you’ve found
 - Examples: research log, research checklist, newspaper_clipping form
 - Organizational forms – use to record what you’ve got and where it can be found
 - Examples: ancestor chart, family unit chart, table of contents
 - Inventories (logs) for correspondence, heirlooms, contents on flash drives, purchased books and AV resources, etc.
 - Notes to Self: wish lists, “Next session, I need to...”
 - Start with MGC fillables: <https://www.mymcpl.org/genealogy/research/family-history-forms>
- “Organization is what you do before you do something, so that when you do it, it is not all mixed up.”
A.A. Milne

Part 4. CHALLENGES – Issues to Anticipate ... and Resolve

- Keeping It All Safe
 - Peter Krogh’s “3-2-1” System - *DAM (Digital Asset Management) Book for Photographers*, 2005
 - 3 copies of each digital file – records, docs, mail/emails, photos, AV files+
 - 2 different storage media (internal hard drive + external hard drive, cloud storage, etc.) – to protect against different types of hazards
 - 1 copy stored offsite – protect from natural disaster, accident, theft?
 - Back up often (monthly+) AND after you upload large amounts of data.
 - Family Tree Magazine – “Five Steps for Backing Up Your Genealogy Files” - <https://www.familytreemagazine.com/preservation/file-back-up-plan/>

- (From article) Free cloud storage often offers limited space, and some cloud storage options are incompatible with some file types.
- Do your homework; select backups that work with YOUR needs.
- Genie-to-go – Tools for Taking Your Genealogy on the Road
 - Cloud storage – Dropbox, OneDrive, iCloud, Google Drive, et al. – good for file sharing and accessing files placed there for remote access
 - MCPL's free Wi-Fi To Go and Chromebook To Go services – <https://www.mymcpl.org/services>
 - Create a list of repositories – federal/state/local libraries, archives, genealogical and historical societies – along your route with their addresses, hours, rules, fees, equipment, and the holdings of interest to your research. (Note: Watch for required reservations!)
- Other Things to “Puzzle” Out – What’s your plan for organizing *these* challenging items?
 - Women’s records. File by maiden name? File with spouse? File in two places? 😬
 - Collateral relatives. File with their parents? Create a separate file for each?
 - Inherited research. (See Sept 2024 *Family Tree Magazine* for great ideas on this.)
 - Spec files. File with *known* ancestors in surname files or give these “maybes” their own space until you have proven the connection(s) to your family?
 - “Not mine” files. While not exactly S.T.U.F.F., you probably don’t want to dedicate a lot of computer or office space to large quantities of files for individuals/families you have conclusively determined to be “not related”. Try to find the balance, retaining only what’s needed to avoid duplicating dead-end research down the road.
- “A good system shortens the road to the goal.” Dr. Orison Swett Marden



Parting Gifts – Onsite and Online Resources on Organizing One’s Genealogy

- Onsite – at the Midwest Genealogy Center (scan code for resources & descriptions) →
- Online – Sites selected for breadth of coverage and links to still more related content:
 - *Family Tree Magazine’s* “41 Secrets to Organizing Your Genealogy” – free pdf featuring top tips from organizing experts along with their personal recommendations for online bonus sites. <https://familytreemagazine.com/freebie/41-secrets-organize-genealogy/>
 - *Family Tree Magazine’s* “Your 2026 Genealogy Research Plan” – This daily plan is peppered with organization and motivational tips to keep the ball rolling! <https://familytreemagazine.com>
 - *FamilySearch.org* “Organizing Your Files” Wiki – More tips plus links to other related sites. https://www.familysearch.org/en/wiki/Organizing_Your_Files
 - *Cyndi’s List* – Links to specific facets of organization. <https://www.cyndislist.com/organizing>
 - Amy Johnson Crow’s website – see especially her *Generations Café* interviews with Janine Adams (www.amyjohnsoncrow.com/organizing-genealogy-files/) and Drew Smith (www.amyjohnsoncrow.com/organize-digital-files)

Time to make a plan and get started on this great Jigsaw Journey!

Assess your needs – Sort out the S.T.U.F.F. – Address the remaining tasks – Put a date on your calendar!



~ Leaving the pieces well-sorted for the next generation ~

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