

From **MOUNTAINS** *to* **MEGABYTES** —**ORGANIZING** *and* **ARCHIVING** *your* **STUFF**



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**Note: a previous recording of this presentation (audio with slides)
can be viewed here: <https://youtu.be/5cuPmUpemO4>**

INTRODUCTION

Being a “family historian” can be a blessing—and a curse. Has your dining room table been permanently highjacked? Do you have boxes of family history STUFF: old genealogy charts in binders, letters, photos, memorabilia, maybe even great-Grandma’s wedding dress, stacked in your basement? Have your family members given you more boxes of stuff because they know you may be the only one in the family who is interested and/or knows what to do with it? Are you afraid that if something happens to you, the next generation will chuck it in the trash?! The overwhelming weight of this responsibility can cause real stress in the lives of those who care about preserving history. It is an increasing problem as the baby boomer generation ages.

Our purpose is to help you reduce the stress and reclaim your dining room table. We will show you how to create a plan and implement strategies for culling, organizing, and digitizing your stuff.

THE END GOAL - THREE STEPS TO CREATING A USEABLE ARCHIVE

- **TOSS AND SORT:** Decide what stays and what goes (and where it goes).
- **ORGANIZE AND PRESERVE:** Preserve what’s worth preserving.
- **DIGITIZE AND SHARE:** Create a useable, shareable digital archive.

REGAINING CONTROL, STEP BY STEP

● **PREPARE TO CLIMB THE MOUNTAIN**

First things first. Whether your mountain is Everest or Ensign Peak, you’ll need to prepare yourself.

- Commit.** Decide how much time you can spend on this process. 15 minutes a day? One weekend a month? Whatever it is, stick to it. The momentum will motivate you.
- Plan of action.** What do you want to accomplish? By when? How much can you do yourself? Weigh your time vs. your budget; can you afford professional help?
- Realistic expectations.** Don’t expect to start Saturday at 8 AM and be done by lunchtime. On the other hand, it may take less time than you think!
- Gather empty boxes.** You’ll need some temporary sorting containers, they don’t need to be archival quality at this point.
- Feel, but don’t dwell.** Expect that this process may trigger some emotions for you. Acknowledge the feelings and move on.

1 STAGE ONE: TOSS AND LOOSELY SORT

This “quick sort” stage will change your life! It’s a way to **quickly and imperfectly** organize your mountains into a system that sets the stage for future sorting and archiving. (To see Tom and I in action doing our own “quick sort,” [view this presentation from RootsTech US 2019](#). We culled 13 random boxes of family history into 8 labeled and sorted boxes in **just four hours**.)

There are some **ground rules** that will help you as you complete this first pass:

- a. Work fast and instinctively. Don’t think too deeply about each item. Don’t stop to reminisce too much (or worse, research). There will be time for that later.
- b. Don’t make any big decisions now. **If in doubt, DON’T throw it out!**
- c. Use very loose sorting categories. You can subdivide later.
- d. Get out only one box (or bag or pile) at a time, and set a timer.

Preparation process for a stage one sorting session:

- a. **Decide what your loose categories will be.** This will depend on the nature of your material. If you have a broad variety of stuff to go through, you may want to start by dividing stuff into generations, such as 1) your own personal history items, 2) things that pertain to your parents’ lives, 3) things that pertain to ancestors. (Then later, on a second pass, you can divide your personal history items into Childhood, High School, College, etc.) Label your empty sort boxes accordingly.
- b. In addition to your category boxes, label **three additional boxes**:
 1. Needs Identification (things that need research to be able to classify)
 2. Can’t Decide Right Now
 3. Donate (things to give to other relatives, or a museum/genealogy organizations)
- c. Grab a large trash or recycling can and place it near you.

Ready to dive in? Choose one box of stuff and bring it into your work area. For each item you pull out of the box, ask yourself the following questions.

- a. Do I know what this is? (If not, chuck it. But if you think it might be important, put it in the Needs Identification box.)
- b. Do I care about this anymore? Who else will care about it?
- c. Would I want to include this in a book someday?
- d. Is it a duplicate? Is the information already posted online? (If so, let it go.)
- e. Is it large and bulky? (Consider photographing it and let the original go. Take framed photos and documents out of the frames and donate the frames.)
- f. Is it obvious trash? You may be surprised at how much junk is mixed in with treasures.

Put the item in the appropriate sort box or trash, and pick up the next. Repeat until you finish the box. Pick the next box (or file drawer, pile or bag) and follow the same process.

2 STAGE TWO: ORGANIZE AND CONTAINERIZE

- a. It may take more than one “toss and sort” pass through each box. If your “Can’t Decide” pile is unwieldy, go through it again and see if you can cull more. If you have more than one boxful in a category, you might want to subdivide. But keep it loose and uncomplicated.
- b. Now that you know how much stuff you really have in each category, find or purchase permanent storage boxes or binders to fit. Make sure they are acid free & archival. Label the boxes and binders.

- c. Now you are ready to digitize what's left, or to hand it over to a professional to digitize. Even if you never make it to stage 3, you'll at least have an organized, labeled collection to pass on!
- d. If and when you receive new items to add to your collection, sort them right away and add them to your labeled boxes. Don't give new random piles a chance to grow!

3 STAGE THREE: DIGITIZE AND SHARE

Properly digitizing your material is crucial to making sure it will survive you. You may even want to get professional help for this part of the process. We've covered this topic extensively in this blog post: <https://tinyurl.com/ybsla7ht>

Here are some general rules of thumb for scanning originals:

- a. Photographs, letters, and documents should be scanned at 300-600 ppi (or more if the prints are very small). Slides should be scanned at 3600 ppi. Tiff (.tif) is best, or Jpeg (.jpg) at the highest quality (lowest compression) setting. Don't use the autoscanner setting on your scanner, and don't scan as PDFs.
- b. Archive/store your camera or phone photos at their original resolution when downloading or uploading from your device.
- c. Add metadata to photos to identify them. (See more here: <https://tinyurl.com/yb3spbtg>)

OPTIONS FOR SHARING YOUR DIGITAL ARCHIVE

- Create an archive index (book or digital) with attached media storage and give to family.
- Donate copies of your archive to genealogical or historical organizations that might be interested.
- Upload your images and documents on genealogy websites such as Ancestry.com and FamilySearch Memories. This is the best way to share your treasures with a wider audience—and to make sure that they will be available for future generations. (Note: FamilySearch Memories can accept .tiff, .jpeg, and .png files up to 15 MB each. Ancestry.com, Facebook, and Instagram will compress and/or downsize your images upon upload.)
- Upload your archive material to cloud storage. Share your cloud files with trusted friends & family.

WHAT DO I DO WITH THE ORIGINALS AFTER I'VE DIGITIZED THEM?

- Different people have different comfort levels and life situations. Some (like me) are family history "minimalists" —once it's properly digitized, backed up, and shared, I am comfortable with letting all but the most precious items go. Others are horrified by the thought of parting with any piece of paper that might be important, even after digitizing. Pay attention to your feelings and your available storage space, and make decisions that feel comfortable to you.
- If you have items that you can't keep but might have value to someone else (either an individual or an organization, such as a historical society, university, or genealogical museum), by all means pass them along. Make inquiries before chucking things in the trash! If nobody you know is interested in the items, especially old photos or yearbooks, consider putting them up for sale (or giveaway) on sites like ebay or craigslist. Many people scour these sites daily to try to find photos of their ancestors. You could make someone's day!