

Successful Cluster and Collateral Searches

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Have you encountered stopping points or “brick walls” in your genealogy research? One method that has proven effective for genealogists and family historians is the use of cluster and collateral searches to help you break through those research barriers.

Collateral vs. Cluster Search

- **Collateral Search:** When you research the collateral lines connected to your direct line ancestors. Most times this would mean focusing on the relatives of someone who married into the family – the wife or husband’s parents, siblings etc. It also can mean distant cousins along your direct line. Also don’t forget those second and third marriages and step-children.
- **Cluster Search:** 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. And a network to which they would contribute to help build up the community.

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, in order 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.

Types of Networks

The concept of a network for our ancestors had many variations depending upon the time period, the location and the ethnic background. Many networks had these components all with their respective sets of records that were generated:

- Occupational
- Religious
- Education
- Business
- Fraternal and Civic Groups
- Women's Groups

Collateral Searching – The Indirect Approach

A basic definition of Collateral Searching: A search for those persons not directly-related to your ancestors, but who are considered part of the same family, usually through marriage. Example: take time to look at the siblings of a woman's husband or her husband's parents and who they married, as well as their children.

- Start out with a direct line ancestor.
- Spend time researching that person's spouse, including parents and siblings.
- Record as much information as possible, no matter how insignificant it may seem. Include occupation, address and other details.
- If needed, branch out with research on the siblings and other non-direct relatives.

Cluster Searching – It's All In Who They Knew

- Begin by understanding the history and the time period of the community where your ancestor settled.
- Use census records, newspapers and other records sets to note interactions.
- Record the information in your research log.
- Cemetery – plot map – who is nearby?

Record Sets for Cluster and Collateral Searching

For both cluster and collateral searches, records are often the same but used differently. Here are some record types to look for:

- Census Population Schedules
- Newspapers
- City and Business Directories
- Land and Property Records
- Vital Records
- Passenger Lists and Manifests
- Religious Records
- Publications
- Court Records
- Occupational Records
- Cemetery Records
- Church Registers
- Military Records
- Passenger Lists
- Tax Rolls

Research Tools

- **Genealogy Research Log** (<http://genealogyresearchlog.com>)
Free spreadsheet template on Google Docs that allows you to track all information you will find in cluster and collateral searches.
- **Spelling Substitution Tables for the US and Canada** (<https://abundantgenealogy.com/spelling-sub-table>)
Helpful when trying to decipher handwriting or understand if an enumerator or recorder of information misspelled/misunderstood information presented to them.

Piecing Together the Evidence

- So what do you do once you've collected a substantial amount of information from your cluster and collateral searches?
- Do you analyze as you research or do you stop and process the information?
- The choice is yours—and here are some methods and tools for analyzing the data and connecting the dots.

Using Spreadsheets and Databases

- **Microsoft Excel** (<http://excel.microsoft.com>)
The standard among spreadsheets, Excel is not just for tracking financial data—it can be used to track research.
- **Google Drive** (<http://drive.google.com>)
Use the spreadsheet program to create your own research tracking database. Also, don't forget the Forms option which allows you to create input forms.

Timelines

- **Timetoast** (<http://www.timetoast.com>)
A free, easy-to-use method of documenting information along a timeline. Also allows you to share the timeline with other researchers and also incorporate it into documents or websites.

Mapping

- **Google Maps** (<http://maps.google.com>)
Have you thought of using Google Maps to map your genealogy research data? Use the My Places feature and insert “pins” at locations that appear in your research including places of worship, residences, etc.
- **What Was There** (<http://www.whatwasthere.com>)
Requires a photo in order to create a pin. Consider using census sheets and images of other documents if you don't have a photo of the actual location.

Wikis

- **WikiSpaces** (<http://www.wikispaces.com>)
Free program that lets you create a site similar to Wikipedia but for your own use.
- **Referata** (<http://www.referata.com>)
Allows you to create a “semantic” wiki online for free. Semantic wikis are better at extracting related data but are a bit more complicated to set up and use.

Education and Articles

- **Elizabeth Shown Mills – Historic Pathways**
(<http://historicpathways.com/articles.html>)
Articles dealing with collateral and cluster searching with great case study examples of the methodology employed and detailed results.
- **Dr. Tom Jones, CG, CGL, FASG, FUGA – Inferential Genealogy**
(<https://abundantgenealogy.com/inferential-genealogy>)
A handout from FamilySearch that explains “how family historians can accurately deduce ancestors’ identities and many aspects of their lives by digging below ‘surface information’ in genealogical records and combining information from several sources. Useful in many situations, inferential methodology is especially helpful where records do not state relationships.”

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 on if you enter them right away.
- **Spelling counts! But 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 an effective collateral or cluster search.
- **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.
- **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.