



Genealogy Institutes: A Deep Dive Into Dynamic Education

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Are you ready to attend a genealogy institute? Do you want to expand your genealogical knowledge? Are you committed to a rewarding deep dive in a specific research topic? How do you choose the right course for you? We will talk about all of this and the benefits of a truly helpful interactive venue for learning. Continuing education is a must for everyone researching their family tree. Directed in-depth education on unique subject matter at an institute can help you do more than just locate records. Learn what you need to get the most out of the repositories and sources we use to trace our ancestors.

Genealogical Education

You have many options for genealogical education. From different levels of experience to different topics of research, educational opportunities abound, particularly online.

- Books
- Periodicals (magazines, journals, etc.)
- Blogs
- Wikis
- Podcasts
- Videos (TV, YouTube, etc.)
- Webinars
- Seminars
- Workshops
- Study Groups
- Conferences
- Online courses
- Institutes

What is a Genealogical Institute?

- Commonly a week-long in-depth course on a specific topic for genealogical research.
- Focused education on specific localities, record types, methodology, or niche topics.
- Led by a qualified course coordinator and additional expert lecturers.
- Virtual or in-person. Small classroom sizes to allow for interactive learning.
- Traditionally institutes have met once a year when in-person, but they are now evolving in the online environment with some having multiple sessions throughout the year.
- IGHR – The Institute of Genealogy and Historical Research, ighr.gagensociety.org
- Gen-Fed - Genealogical Institute on Federal Records, gen-fed.org
- GRIP - Genealogical Research Institute of Pittsburgh, grip.ngsgenealogy.org
- MAAGI - Midwestern African American Genealogy Institute, maagiinstitute.org
- SLIG – Salt Lake Institute of Genealogy, slig.ugagenealogy.org
- TIGR - Texas Institute of Genealogical Research, txsgs.org

Are You Ready for an Institute?

- Have you been researching for a while and now find yourself with a lot more questions about how to do this or how to find that?
- Do you consider yourself beyond the point of being a beginner, but you aren't sure if you could be considered an intermediate researcher or not?
- Do you have brick walls in your research?
- Are you continually spinning your wheels and repeating steps in your research?
- Have you already spent a lot of time attending webinars and seminars?
- Are you ready to learn about other routes and new avenues to follow in your research?
- Are you ready to move away from your "usual" two websites directly into in-depth research planning in records repositories and applying productive new methods and techniques?

Picking the Institute Course

- Read the website content for information about an institute (FAQs, About, History, etc.)
- Look for the course catalog and read the descriptions for all upcoming courses.
- Determine if there are any prerequisites before you take a certain course.
- Look for required reading and suggested reading lists for each course.
- Do the topics fit your ancestors and your areas of research, including time periods, locations, ethnicities, religions, occupations, etc.?
- Do the topics fit your own personal educational needs and goals?
- Does the institute offer a series of courses that you could invest in for the next few years?
- Does the institute offer a course that will complement other educational opportunities you have planned to pursue?

About The Instructors

- Read the instructor bios to understand their background, personal strengths, and expertise.
- Visit the instructors' websites or blogs to learn more about/from them ahead of time.
- Look for other webinars available by the instructors to watch ahead of time.

Social Media

- Institutes all have a presence on social media. Look for them in your favorite spots.
- Facebook pages will be the official representation for the institute with announcements made about upcoming courses, dates, registration information, deadlines, and more.
- Facebook groups are available for many institute attendees. This is a great place to talk to fellow genealogists about the courses, what they like and don't like, and how best to prepare for attending an institute. Many genealogists become lifelong friends and these institute groups are used to keep in touch and to plan for getting together, rooming together, or sharing transportation options to in person venues.

Registration

- Put the institute registration date on your calendar and set a reminder.
- If there is more than one course you are interested in, choose a Plan A and Plan B, because sometimes courses fill up quickly.

- Read the registration instructions on the institute website ahead of time so you are ready when the day comes. If the website requires you to have an account to register, to save you time determine if you can do that prior to registration day.
- On the day of registration, set an alarm to be there when it opens. Have your payment method ready to go as well.

Personal Accommodations & Accessibility

Virtual Institutes

- See “Preparing Yourself & Your Household Ahead of Time” below.
- If you have hearing or vision issues, you are likely already well acquainted with hardware and software used to enhance your online experience. The meeting software most often used for virtual events is Zoom Meetings. Bookmark and review these FAQ pages ahead of time.
 - Changing settings in the Zoom desktop client or mobile app, https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0060612
 - Adjusting the size of chats and captions, https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0058202
- When in question, always contact the institute coordinators ahead of time with questions.

In Person Venues

- Review all information on the website well in advance about places to stay so that you meet reservation deadlines for rooms, transportation, and meal accommodations.
- Check ahead of time to make sure the venue will allow you to bring in food or beverages from outside. Most often this will be fine, but some libraries may not allow this.
- Bring a bottle of water (or two), because not all venues will have water or beverages available.
- Look at the institute and venue websites for information regarding special dietary requirements.
- If necessary for your dietary needs, bring a snack for mid-morning or afternoon.
- Do you need mints, cough drops, or throat lozenges?
- Should you bring tissues?
- When in person, there is not always an available electrical outlet. Some facilities will not allow you to plug in your electronic devices because of fire department rules and regulations, especially if it means stringing a cord across a walkway or aisle. Plan ahead.
- If you have hearing or vision issues, be sure to show up early so that you can get seats close to the front of the room. Alert the speaker to let them know what you need.
- When in question, always contact the institute coordinators ahead of time to be sure all your needs can be accommodated.

Your Computers and Electronic Devices

Necessary Equipment, Hardware, and Software

Devices

- The recommendation for the best option would be to use a computer or laptop. It is easier to see things, to read things, and to do multiple things at once, like take notes and view online items while also viewing the lecture.
- Or a large iPad/tablet with a good-sized screen and/or an attached monitor.
- Second monitors should certainly be on everyone’s wish list.

- Phones are not recommended. The smaller the screen the harder it is to both watch the lecture while also taking notes and more.

Internet

- A hard-wired ethernet connection directly to your modem or router is a good choice for best service, particularly if you already know that Wi-Fi doesn't work well in your location.
- Wi-Fi will work for most people accessing the online classroom. It all depends on your location, your internet accessibility, and the speed of your Internet connection and your electronic devices including the modem and router you use.
- Have a backup plan in place in case you lose your internet connection. Go to a library? Go to a friend's house? Learn how to use your cell phone or tablet as a possible hotspot for your computer in place of your modem. If you plan on using your mobile device to access the class, be aware that some of the options may not be available in the Zoom app that are normally available on the computer version.

Webcams

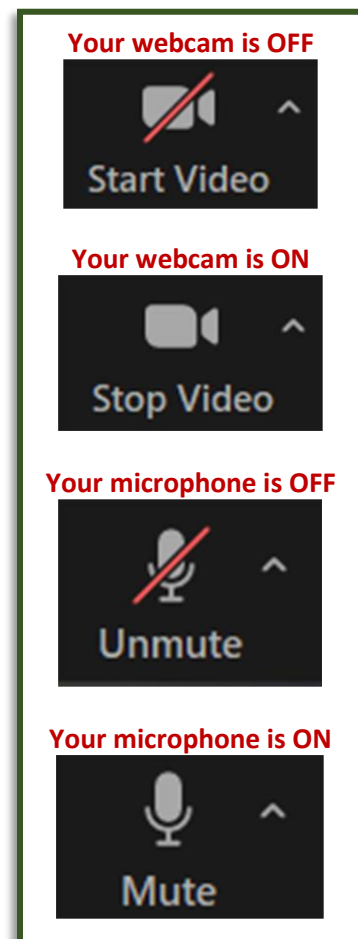
- Webcams are nice, but they are not necessary for the attendee.
- You can still see the instructor and the lectures even if you have no webcam at your end.
- Webcams generally come built-in for all laptops.
- For desktop computers webcams are usually a separate piece of equipment that is mounted on top of your monitor.

Microphones

- A microphone is necessary if you want to be able to verbally ask a question (text chat questions are available too).
- Microphones are built-in to laptops but are generally separate on desktops.
- They are generally built-in to most webcams for desktops.
- Microphones are often part of a headset or headphones.
- Microphones are not always part of earbuds.
- Depending on your devices you may have more than one microphone to choose from.
- Test your microphones ahead of time to get the right settings for you and your environment. Ask a friend to meet you online to test things out.

Speakers or Headphones

- Good speakers or headphones ARE necessary to be able to hear the speaker.
- The recommendation is to use headphones. It keeps the instructor's voice right in your ear, so you are less likely to be distracted by other household noises.
- Familiarize yourself with the settings on your computer to raise or lower the volume of your speakers or headphones.



- Familiarize yourself with the official name and model for the speakers and headphones you plan to use during the lectures. This helps with locating them on settings menus within Zoom.

Electronics Etiquette

- Remember: when you are in a virtual classroom you are IN a classroom with other people.
- Turn off or mute noisemakers in your location (e.g. timers, alarms, Alexa, etc.).
- Turn off your phones or set them to vibrate.
- Put away the phone during lectures to avoid distracting yourself and others around you.
- Don't answer the phone during the lecture without first leaving the classroom or muting your microphone in an online classroom.
- Familiarize yourself with the features in Zoom or other software programs to know how to quickly mute your microphone or camera.
- Mute your microphone during the lecture. This ensures that everyone can hear the instructor and they don't hear any accidental background noises.
- Mute your microphone if you need to speak to others or if/when you have sudden noises or disruptions at your location.
- Stop the video on your camera if you move around a lot or if you have other devices (e.g. fans, ceiling fans, television screens, etc.) or people moving in the background at your location.
- After a break or lunchtime, when you return to your computer, doublecheck your settings to be aware of any muted/not-muted microphones and cameras.

Preparing Yourself & Your Household Ahead of Time

- Sleep well the night before.
- Be sure to have breakfast.
- Get your snacks, lunch, and beverages ready ahead of time.
- Plan a week in advance for your snacks and meals during institute week. You will be in class all day, so having quick and easy menus ready to go will help you focus on the education.
- Many students make meals ahead and freeze them. Some plan and prepare slow-cooker meals. Or gather up your favorite take-out menus!
- Be sure to get up and walk around between sessions.
- Remember to plug in your laptop or mobile devices so they are fully charged each day.
- Choose a quiet and comfortable place to view and participate in the course.
- During the day, mute your phone and other noisemakers in the background.
- Consider putting a sign on your front door or office door asking people not to knock or ring doorbells because you are participating in a live class.
- Remind your housemates you will be on a **LIVE** Zoom meeting with a webcam and microphone.
- Ask your housemates not to use a lot of bandwidth on your Internet connection during the day so that your classroom video is clear and without interruption.
- Login early the first day to be sure you get your microphone and webcam all set the way you want them. The Zoom helpers will be available to help you with any questions before class.

In Person

- Bring a sweater or jacket in case the room is cold. Dressing in layers helps.
- Make yourself a list of the things you need to bring with you.
- For tips ask other institute students on social media channels.

Course Materials

- Download and/or print the syllabus/handouts before the first day of class.
- Download and read all other relevant materials for your class *before the first day*.
- Create a folder on your browser's Bookmark Toolbar for your course. This gives you quick and easy access to everything you need for the week.
- Bookmark your Zoom link(s) for class and other events.
- Bookmark your other institute items: the cloud-sharing folder, the schedule, etc.
- Put a copy of the daily schedule on your desktop (your computer or your physical desk) to glance at throughout the day/week.
- Add the schedule to your personal calendar (digital or paper).
- For taking notes during the lectures have a notepad at hand or open a software program on a second monitor or device (e.g. Word, Evernote, OneNote, etc.). See "Notetaking" below.

Instructor Intellectual Property

- Respect the intellectual property of the instructors. Many of them spend hundreds of hours amassing the knowledge and the materials they use to teach the courses. The lectures and all lecture materials they create are under copyright protection.
- Do not record the lectures.
- Do not take photos or screenshots of the speaker's materials without permission.
- Do not share the handouts or syllabus with others.
- Do not share the links to any of the course materials with others.

Notetaking

- Use whatever notetaking approach works best for you and your brain.
- Use a tablet and pen or pencil.
- Use a small laptop or tablet for electronic notetaking.
- Use color-coding with fancy pens and different font colors.
- If you have more than one monitor or device you can watch on one screen while taking notes on the other screen.
- Download the syllabus and handouts before the first day of class. Determine if you want to use the electronic version or print it and use a paper version.
- If you print a copy of the syllabus and put it into a 3-ring binder you can easily add pages for your notes or additional handouts into the same notebook.
- Read the syllabus or handouts before each lecture. At least skim them to get an overview.
- If space is available, take notes directly on the syllabus/handout next to the corresponding points. Use the blank space on the backs of the pages, if available.
- Use post-it notes and highlighters to mark special points in the material.
- In Zoom meetings be sure to save a copy of the Chat each day. It is a text file that can be saved with your electronic notes or printed and put into your physical notebook.

Software

- Evernote, <https://evernote.com>
- OneNote, <https://www.onenote.com>
- Google Keep, <https://www.google.com/keep/>
- Simplenote, <https://simplenote.com>
- Bear (Mac and iOS), <http://www.bear-writer.com>
- Trello, <https://trello.com>
- To Do List apps
- Calendar apps

How To Take Notes

- The Best Techniques for Taking Notes
<https://lifelacker.com/back-to-basics-perfect-your-note-taking-techniques-484879924>
- What's the best, most effective way to take notes?
<http://theconversation.com/whats-the-best-most-effective-way-to-take-notes-41961>
- Effective Note-Taking in Class
<https://learningcenter.unc.edu/tips-and-tools/effective-note-taking-in-class/>
- Effective Listening and Notetaking
<https://www.jmu.edu/first-gen/valleyscholars/files/listennotes.pdf>

Asking Questions

- Plan ahead if you want to ask the instructor(s) for specific research advice. Write out the question and what you already know so that they can give you a productive and complete answer. Keep in mind that you might get the answer to your question during class time.
- Make sure ahead of time that the instructor's expertise will likely cover the question(s) you have for them.
- During the lectures, make a note or write down the questions that come up so that you can ask them at the end. It's generally better than interrupting the flow of the lecture.
- On Zoom, use the Chat feature to ask your questions.
- Keep your questions on topic and appropriate for the lecture, the point being made, or the expertise of the speaker.
- Be sure not to dominate the instructor's time with extra comments or questions except when appropriate—during Q&A, at the end of the lecture, etc.

Surveys: Constructive, Meaningful, and Useful Criticism

- Complete the available course surveys each day/week. Feedback is important to help facilitators continue to improve things from year to year.
- Comment on things that the hosts can control. They often cannot control things specific to an in-person venue like temperature or quality of the seats, sound system quality, etc. They can try, but sometimes it is out of their hands.
- Remember that not everyone will want the same atmosphere or temperature or food options.
- If your complaint is about the in-person facility – the parking lot, the layout of the room, etc. – remember that a lot of that is out of the control of the hosts. Provide constructive criticism that they can pass along or report the issue directly to the people in charge of the venue.

Manage Your Expectations

- Not everything you hope to learn will be included in each lecture. Remember that there is only one lecture slot for a speaker to include as much as they can on one topic, so not everything you need will be included.
- You will absorb so much more information than you realize. Things you learn today will pop back up later in your research journey.
- Relax and enjoy the time learning with your fellow genealogists!

After the Institute

- Review the syllabus and your notes. More than once. Seasoned researchers often refer to their syllabi long after the institute is over.
- While it's still fresh in your head, practice a few of the things you learned. Applying is learning.
- Follow the instructors from your course on social media to determine if they will be speaking at other events that you can attend to reinforce what you learned at the institute.
- Continue to follow the events at institutes by following them on social media, joining their Facebook groups, and subscribing to their mailing lists and newsletters.

Why Attend an Institute? IGHR Students Tell Us Why

"I learned how to find records I didn't even know existed."

"Today's classes were very exciting and informative. It really opened my eyes to a whole new door of genealogy and promise."

"This course has reintroduced me to other paths of research."

"The course was very comprehensive. I thought I knew more than I actually did. I really learned a lot and will continue to consult my notes and the syllabus."

"This is an excellent course taught by knowledgeable instructors on topics that can be applied immediately to my research questions. I can't wait to use what I have learned."