



Some People Really Need to Get a Clue! Document Analyzation and Evaluation

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Mastering the art of analyzation and evaluation should be the goal of every genealogist. It is an essential and crucial skill. It's not too terribly difficult to learn, but it does require study and practice. Those who dedicate time and effort to this cause will find that they glean more clues from the records they search—subtle clues that novice genealogists tend to gloss over. None of the concepts presented in this class are new. They have been taught and advocated by professional genealogists for years. This class highlights several of those key concepts.

In this class we will review principles of analysis and evaluation and provide participants with practice opportunities. Along the way we will learn how to glean clues from common genealogical records. Included is expert research advice and references to illustrative articles.

KEY DEFINITIONS¹

Analysis: Refers to two processes: (a) recognizing the information and evidence items a source contains that are likely to answer a research question directly, indirectly, or negatively (b) considering the characteristics, purpose, and history of a source and its relevant information items in order to determine their likely accuracy

Authored Works: A written product that synthesizes information from many prior sources and presents the writer's own conclusions, interpretations, and thoughts

Derivative Record: A record created from a prior record by (1) transcribing the prior record or part of it by hand or keyboard or by using optical-character-recognition, speech-to-text, or other technology, (2) abstracting information from it, (3) translating it from one language to another, or (4) reproducing it with alterations

Direct Evidence: An information item that by itself answers a research question

Evidence: A research question's tentative answer, which may be right or wrong, complete or incomplete, or vague or specific; may be direct, indirect, or negative

Indirect Evidence: Two or more information items that answer a research question only when combined

Negative Evidence: A type of evidence arising from an absence of information in extant records where that information might be expected

Original Record: A written report of an action, observation, utterance, or other event, often but

¹ All definitions were originally published in Thomas W. Jones, *Mastering Genealogical Proof* (Arlington, Virginia: National Genealogical Society, 2013). Reproduced by permission of the author.

not always made at the time of the event or soon after and not based on a prior record

Primary Information: Information about an event provided by an eyewitness to the event

Record: An account, usually written, of an action, observation, utterance, or other event, typically intended to describe, document, memorialize, or note the action, observation, utterance, or other event; may be original or derivative

Secondary Information: Information reported by someone who obtained it from someone else; hearsay

Source: A container of information; includes all kinds of publications and unpublished artifacts, records, recordings, and written materials; may be used in a physical form or as a facsimile

PRINCIPLES OF ANALYSIS AND EVALUATION

Effective analysis and evaluation is achieved when we carefully study, appraise, and scrutinize the records we use. These skills are best developed by learning to ask a series of questions. It's the old who, what, when, where, how, and why approach. When we learn to ask the right questions and seek answers to those questions we begin to unlock a records hidden secrets.

We begin by first analyzing the *source*. Is the record legible? When was it created? Do we know who created it? Furthermore, is the source an original, derivative, or authored narrative? These are important questions we must seek to answer to better understand our sources.

Once we have evaluated the source we can proceed to analyze the *information* it contains. Again, we ask ourselves specific questions: Who provided or recorded the information? What, if any, relationship, association, or connection exists between the person named therein and the informant? What inferences can we make? Is the information primary, secondary, or undetermined? Are there any conflicts or inconsistencies? If so, can we resolve them?

Next we analyze the *evidence* contained within the information. Who is named in the record? Are there family, friends, neighbors, witnesses, clergy, or civil authorities mentioned? Might those individuals have created prior or later records worth considering? What about mention of organizations, institutions, or societies? Pay close attention to spelling variations, titles, positions, etc. What information items (events, relationships, ages, occupations, etc.) are listed or described? When did the event or interaction take place? Do you know where it occurred? Why was the record created? What underlying or triggering events caused the creation of the record but are not record within? Does the evidence provide answers to any of our research questions? Are there other records that might verify or corroborate the newfound evidence?

If we don't take time to carefully analyze and evaluate our documents we may misinterpret them. We may also miss out on important clues. Avoid the temptation to go too fast. Take time to analyze and evaluate! As you learn to ask the right questions and seek the answers to those questions you will begin to master the art of analyzation and evaluation.

EXPERT ADVICE

Beginning and intermediate genealogists can learn a lot from seasoned professionals. Whether by attending a class or workshop at a local or national conference, reading a book about a record type, region, or methodology, or dissecting an article about a complex genealogical problem; discovering how professional genealogists think and approach problems can be very insightful. If you really want to get a clue, then take time to learn from the best. Below is a sampling of advice and examples from respected and renowned genealogists that illustrate key research concepts.

Read Scholarly Articles

"Reading essays, case studies, family histories, research reports, and other articles in such scholarly periodicals as the National Genealogical Society Quarterly; the New England Historical and Genealogical Register; The American Genealogist (TAG); and the once-private The Genealogist (TG), ...exposes us to quality work and new insights." – Claire Mire Bettag

Further Reading:

Bettag, Claire Mire. "Educational Preparation," in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians*, ed., Elizabeth Shown Mills (Baltimore: Genealogical Publishing Co., 2001), 18–42.

Don't Forget the Fan Club

"To prove identity, origin, and parentage, study individuals in the context of their FAN Club: Family, Associates, and Neighbors." – Elizabeth Shown Mills

Further Reading:

Litchman, William M. "Using Cluster Methodology to Backtrack an Ancestor: The Case of John Bradberry." *National Genealogical Society Quarterly* 95 (June 2007): 103-16.

Mills, Elizabeth Shown. *The Historical Biographer's Guide to Cluster Research (the FAN Principle)*. Baltimore, Maryland: Genealogical Pub. Co., c2012.

Wilcox, Shirley Langdon. "Associations Re-establish Family Links: The Youngs' Serial Migration from Virginia through Kentucky and Missouri to California." *National Genealogical Society Quarterly* 103 (September 2015): 209–228.

Study Signatures

"It is not unusual to find two or more sets of same-name families appearing in the records of a specific area. It sometimes seems impossible to sort out which child belongs to which family. It can be difficult to determine which same-name groom of the several candidates married which bride. In such cases, the solution may lie in signatures or marks affixed to the original documents, by which testators, witnesses, and other parties leave direct evidence of their own identity and, often, indirect evidence of a myriad of other matters." – Ronald A. Hill

Further Reading:

Hatcher, Patricia Law. "How Did Your Ancestor Sign Their Names?" *Ancestry* 22 (January/February 2004): 28–33.

Hill, Ronald A. "Identification through Signatures: Using Complex Direct Evidence to Sort Colwills of Cornwall." *National Genealogical Society Quarterly* 87 (September 1999): 185-198.

Understand the Law

"To understand our ancestors' lives - why they did what they did, we need to understand the law that governed their lives in so many ways....knowing the law our ancestors lived by helps us make sense of the records they left and find clues to more and different records." – Judy G. Russell

Further Reading:

Fleming, Ann Carter. "Genealogical Applications of American Statute Law." *National Genealogical Society Quarterly* 95 (September 2007): 197–210.

Freilich, Kay Haviland and William B. Freilich. *Genealogy and the Law: A Guide to Legal Sources for the Family Historian*. Arlington, Virginia: National Genealogical Society, 2014.

Law and Genealogy: A theme issue of the National Genealogical Society Quarterly. Arlington, Virginia: National Genealogical Society, 2007.

Consider DNA

"DNA test results can provide evidence to corroborate traditional research or clues to attack a brick wall." – Debbie Parker Wayne

Further Reading:

Fox, Judy Kellar. "Documents and DNA Identify a Little-Known Lee Family in Virginia." *National Genealogical Society Quarterly* 99 (June 2011): 85–96.

Hollister, Morna Lahnice. "Goggins and Goggans of South Carolina: DNA Helps Document the Basis of an Emancipated Family's Surname." *National Genealogical Society Quarterly* 102 (September 2014): 165–76.

Wayne, Debbie Parker. "Using Y-DNA for Genealogy." *NGS Magazine* 40 (January-March 2014): 20-24.

Create a Timeline

"Timelines can offer us a fresh, new look at our genealogical data and can be a useful strategy for solving difficult research problems..."

"Sometimes merely changing the format and showing the data in a new way can reveal existing discrepancies and allow us to solve difficult research problems." – Chuck Knuthson

Further Reading:

Knuthson, Chuck. "Timelines: A Chronology of Life Events." *NGS Newsmagazine* 34 (July-September 2008): 38–42.

Use Tables and Spreadsheets

"Visually organized data can help us view and comprehend large amounts of information.

"Tables in a word processor or a spreadsheet are an excellent tool for this....

"In a single glance you can see what you have and what you need. The empty cells are 'research opportunities,' and the table is your 'roadmap for research.'" – Patricia Law Hatcher

Further Reading:

Patricia Law Hatcher, "Using Tables and Spreadsheets in Research," *Genealogical Computing* 23 (April-June 2004): 15–17.

Family Group Sheets & Pedigree Charts

"Some type of pedigree chart should be prepared from the information you find so that you can get a true picture of what you actually have... The family group record provides an easy way to organize the records relating to your ancestors into a family format to facilitate your analysis. The use of family group records gives you a better perspective of what you have found and the gaps still left to be filled." – Val D. Greenwood

Further Reading:

Greenwood, Val D. "Analyze the Pedigree and the Place," in *Researcher's Guide to American Genealogy* 3rd ed. (Baltimore, Maryland: Genealogical Publishing Company, 2000), 47–64.

Keep Research Logs

"Every family history researcher...should use research logs....The first is to list the sources where you plan to look in the future. The second, use research logs to show where you have found useful information....

"In addition, use research logs to list sources in which you found no useful information....

"...a genealogist who has research logs full of unremitting negative searches, can deduce that it is time to try somewhere else, or some other type of record....

"Your research logs will save time for the genealogist who someday steps into your shoes." – G. David Dilts

Further Reading:

Dilts, G. David. "Research Logs: The Most Important Tool for Organizing Your Family History." *Genealogical Journal* 30 (2002): 3–13.

Write a Research Report

"Writing a summary report as a standard practice in all your research endeavors will provide additional bonuses for your own research. Through the writing process of analyzing evidence and synthesizing data with reason and logic, certain "holes" or gaps in research are often illuminated that might otherwise never be noticed. These "holes" may include an overlooked record source, a possible avenue for future research not considered earlier, or a connection between neighbors and associates of the ancestor not previously recognized." – Linda Gulbrandsen

Further Reading:

Gulbrandsen, Linda K. "Writing a Quality Research Report," in *Becoming an Excellent Genealogist: Essays on Professional Research Skills*, ed., Kory L. Meyerink, Tristan L. Tolman and Linda K. Gulbrandsen ([Salt Lake City, Utah]: ICAPGen, ©2012), 179–188.

Mills, Elizabeth Shown. "Proof Arguments and Case Studies," in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians*, ed., Elizabeth Shown Mills (Baltimore: Genealogical Publishing Co., 2001), 391–408.

Mills, Elizabeth Shown. "Research Reports," in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians*, ed., Elizabeth Shown Mills (Baltimore: Genealogical Publishing Co., 2001), 349–78.

Cite Your Sources

"...we may have been told that identifying sources is important for two reasons. First, we provide "proof" for what we write. Second, we enable others to find what we have used. Both purposes are valid, but they miss the most critical point of all: We identify our sources—and their strengths and weaknesses—so we can reach the most reliable conclusions." – Elizabeth Shown Mills

Further Reading:

Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. Baltimore, Maryland: Genealogical Publishing Company, 2007.

SELECTED BIBLIOGRAPHY

Anderson, Robert Charles. *Elements of Genealogical Analysis*. Boston, Massachusetts: New England Historic Genealogical Society, c2014.

Board for Certification of Genealogists. *Genealogy Standards*. 50th Anniversary Edition. Nashville, Tennessee: Ancestry.com, c2014.

Devine, Donn. "Evidence Analysis," in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians*, ed., Elizabeth Shown Mills (Baltimore: Genealogical Publishing Co., 2001), 327–42.

Evidence: A Special Issue of the National Genealogical Society Quarterly. *National Genealogical Society Quarterly* 87, no. 3 (September 1999).

Jones, Thomas W. *Mastering Genealogical Proof*. Arlington, Virginia: National Genealogical Society, 2013.