

Piecing Together the Story: Analyzing Records and Drawing Conclusions

Class 1: Analyzing, Evaluating, and Leveraging a Record

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As family historians we use many records and resources as we build our family tree. Most of the original records we use were not created with genealogists in mind—we simply learned to abstract vital details about our ancestors from these records. For many years, especially before computers, there were efforts by organizations and individuals to publish compiled family histories, abstracts of records, transcriptions of records, even sometimes translations of records in other languages—all in effort to aid family historians in their quests. All of these resources should be analyzed and evaluated and compared with each other.

Art of Analysis

When it comes to analyzing records, Robert Charles Anderson outlines the basics in his book *Elements of Genealogical Analysis*.

- Source analysis
- Record analysis
- Linkage analysis

The first two deal with the examination and evaluation of the evidence. The third involves genealogical conclusions. It is from the solid analysis of the first two that you can even get to the third.

Source Analysis

Many times, we find that researchers use the terms *source* and *record* interchangeably. However, there is a difference, and it is important to recognize that difference.

A *source* is a collection of records that is created by a single author (such as a book of abstracts) or created by a single entity (such as the probate records of a county court). Meanwhile a *record* is the item within the source that pertains to a single event.

One of the most important questions to be asked when working with a *source* is whether you are working with an *original* or a *derivative*.

Original records are those that are from the period being researched and include:

- Duplicate original
- Record (Clerk's) copy
- Image copy

Digital copies, microfilm and microfiche versions of these records are *considered original for analysis purposes*.

Derivative sources are those that have been written by someone who did not experience the events or time period and include:

- Transcripts
- Extracts
- Abstracts

These are the published sources that many family historians relied on for years before digitized documents became available online.

There is another class of sources that many researchers have become familiar with—**authored works**. These include compiled genealogies. Some are of a higher level of accuracy than others.

When analyzing a source there are important questions to keep in mind:

1. Is this an original or a copy/derivative?
2. When was the source created?
3. Who created the source?
4. What formulas were used in creating the source?

Question four is asking about how the entries are arranged. The arrangement of the records within a derivative source especially may result in the loss of the original organization of the records. This can make analysis more difficult. For instance, a census page that is arranged alphabetically by the first letter of the surname means that it is not possible to identify who is living near your ancestor.

Record Analysis

First, a reminder. The **record** pertains to a **single event** within the source. Like the source, you need to evaluate the record by asking similar questions to that of the source:

- Original
- Derivative
- Authored Work

In addition, you will usually need to use a compilation of records in order to draw your conclusions about the person you are researching.

Tip: With any derivative record see if you can find the original record to verify the accuracy of the entry.

Analysis vs. Evaluation

While it is important to analyze the type of record you are working with as mentioned above, it is also important to evaluate the record itself to see what it is telling you. Let's be honest. We scan records looking for the information we expect to find before quickly moving on to the next document that the online genealogy website has supplied us with.

Analysis

By definition per *Merriam-Webster Dictionary*:

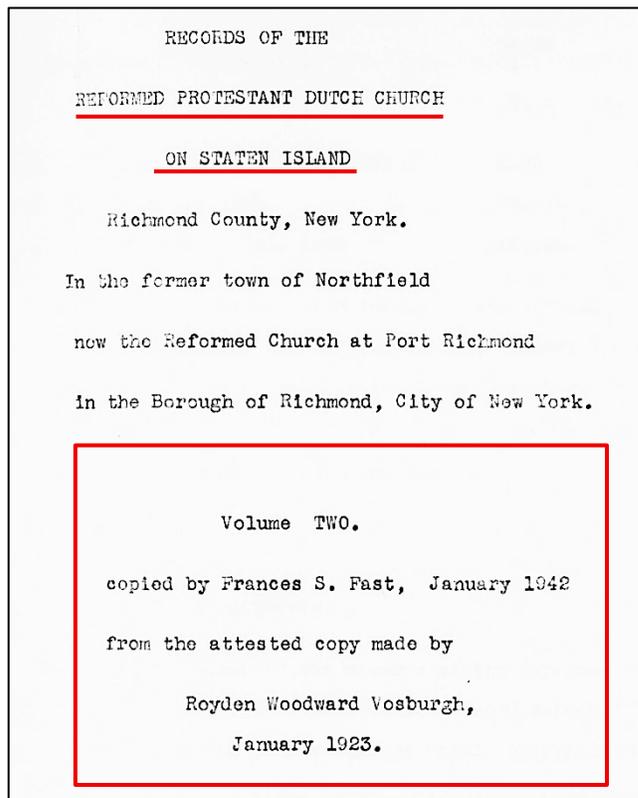
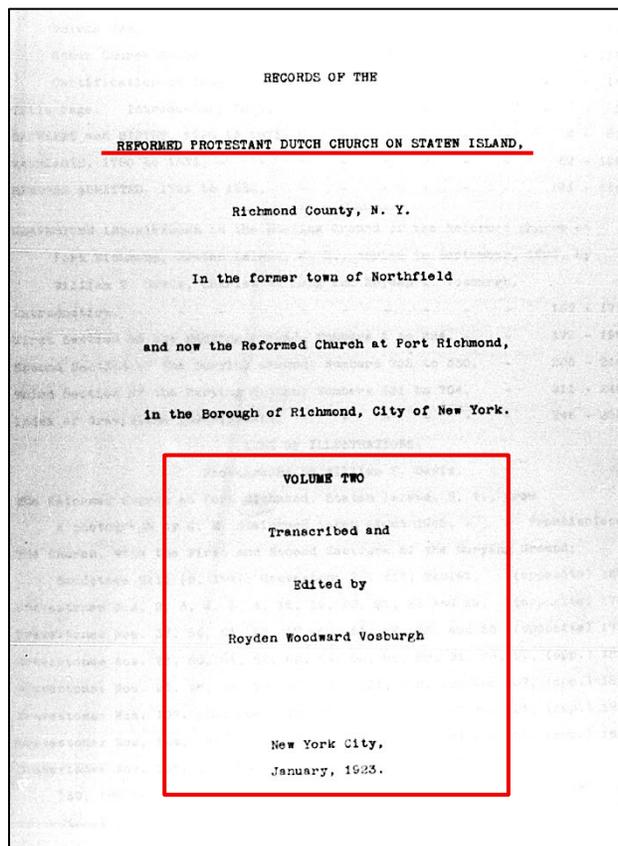
1. A **detailed examination** of anything complex in order to understand its nature or to determine its essential features.
2. **Separation** of a whole into its **component parts**.

Evaluate

According to *Merriam-Webster Dictionary*:

1. To determine or fix the value of.
2. To **determine** the **significance**, worth, or condition of usually by **careful** appraisal and **study**.

Church records are one resource that has often been abstracted. Once again, if possible, you want to view the original records, but you must also be mindful of potential variations of the same abstracts.



And in my Saviour's Image Rise.

119 In | Memory of | Elsy Britton | Daughter of Joshua | and | Deborah
Mersereau | who died | August 23th 1831 | aged 18 years | 11 months and
23 days | [Footstone] E. B. M.

Note. This stone is much worn and the above is possibly not quite correct; there is also a verse, which is illegible.

119 Mersereau, Elsy Britton, dau. Joshua and Deborah Mersereau died Aug. 23, 1831 age 18y 11m 23d. Note: This stone is much worn and above may not be correct. (page 31 line 1 bp. June 9, 1818; birth is given as Aug. 30, 1817; this would make death date 1836 to coincide with age given.)

Authored Works

Authored works refer to items such as compiled genealogies. They can pertain to the descendants of a specific individual, or they can focus on a specific event, period, location. Some examples of authored works include:

- Robert Charles Anderson, *The Great Migration Begins: Immigrants to New England, 1620-1633*, 3 vols. (Boston: New England Historic Genealogical Society, 1995)
- Robert Charles Anderson, *The Great Migration: Immigrants to New England, 1634-1635*, 7 vols. (Boston: New England Historic Genealogical Society, 1999-2011)
- Scott Andrew Bartley, *Early Vermont Settlers to 1771*, 2 vols. presently (Boston: New England Historic Genealogical Society, 2017-)
- *Mayflower Family through Five Generations* (published by the General Society of Mayflower Descendants) showing descent from male passengers of the Mayflower

Reliable authored works will supply citations to the records used so that researchers coming behind can not only evaluate the compiled work by the author but also turn to the sources used by the author. Of course, even the most scholarly of authors will rely on derivative sources, especially when the originals either no longer exist or are in two extreme a condition to be used.

Tip: Always read the introductory pages of authored works.

Record Analysis vs. Record Evaluation

Working with our individual records it is important to approach the records from two different angles:

- Record analysis, asks questions such as
 - Why was this record made?
 - Who created this record?
 - Who provided the information being recorded? (Who was the informant?)
 - Are there any contradictions within the information given? Between this record and others?
- Record evaluation, examines:
 - What is some of the information unique to this record?
 - What new clues about the person or family does this record offer?
 - What should you follow up on?
 - Are there any contradictions within the information given? Between this record and others?

Tip: Mistakes and typos happen.

Because derivative works rely on not only the work of the individual who originally compiled, transcribed, abstracted, or translated the original records in question but also on typists and typesetters (back before computers), it is always possible for errors to creep into any published volume.

When working with derivatives it is good practice to follow up on records and sources identified in footnotes or embedded citations. Also, depending on the work, and limitations due to word count or scope, not all the information from a specific record or source may have been used in the derivative work you are now accessing.

If you discover that the compiler of a derivative work has himself or herself accessed other derivative works, you will want to see if it is possible to track back to the original source, especially if the information you have amassed on your ancestor is in contradiction with said derivative resource. This may not always be possible, but if you can find either the first derivative source or some indication of which source is the most accurate, this allows you to better evaluate the information you are finding.

Leveraging

Leveraging within family history research is the art of considering all that you find in a specific record but also evaluating that record as a scientist evaluates the results of an experiment.

- Assign the *record* on a reliability scale (the complete source may have a different reliability level)
- Honestly look to see if there are noticeable problems
 - Typos
 - Mistakes
 - Mistranslations
 - Mistranscription

Assign a reliability level (and color on your research log) to each record:



Rating System

Keep the following comparisons in mind when applying the rating system:

- Original > Copy
- Individual reporting > Informant
- Record close to the event > Record far removed from date of the event

- Educated clerk > Uneducated clerk
- Reliable source > Uncited source

Once again, apply the cold hard view of a scientist. Did the compiler allude to something but not supply additional details? If so, it could prove essential to your research to dig further into the record that was alluded to. It is always better to have sought out a record and found it to not be helpful than to ignore such an item. If you don't look at the alluded record, you will never know what it was truly about.

Likewise, once something has been published, it is destined to be used and reused. Before computers this could lead to individuals repurposing a story or supposed fact about an ancestor. Today, with people simply adding facts to their online family trees, often with no analysis or evaluation, these errors are perpetuated ad infinitum.

Tip: Always find the earliest published version of a fact or story.

Consider creating a small table of those published derivative sources in which you have found the fact or story, using their publication details to determine where the earliest version can be found. This may not be a complete list, but it offers an idea of the travel of said fact or story.

<i>Mémoires de la Société Généalogique Canadienne- Française</i>	<i>Le Bulletin des Recherches Historiques</i>	<i>Dictionnaire généalogique des familles du Québec</i>
Published: 1968	Published: 1927	Published: 1983
Cites <i>Le Bulletin des Recherches Historiques</i>		No citation in entry, lists sources in introductory material, including 1667 census

<i>Mémoires de la Société Généalogique Canadienne- Française</i>	<i>Le Bulletin des Recherches Historiques</i>	<i>Dictionnaire généalogique des familles du Québec</i>
<i>Second derivative source</i> that references the first derivative source	<i>First derivative source</i> and it mentions both entries from 1667 census	Apparent <i>third derivative source</i> that mentions 1667 census in resources used, but did not pick up second entry in the census

Keep in the back of your mind the number of typos, errors, or mistakes that you have uncovered within the research of a specific individual and rely on your inner voice. If there have been a number of issues with the research you have already accomplished, then your inner voice is likely telling you to distrust any information found in derivative sources. Heed this feeling. Remember original documents are the most reliable and should *always* be sought after. However, there are situations where one step of research after another seem to point out errors and mistakes in prior research of a particular ancestor. In such cases, seeking out original documents is a **must**.

Additionally, you may find that along the way someone else has found the same issues as you and perhaps addressed them in a scholarly article. Keep abreast of authored works within scholarly journals to see if current citations offer you a better insight into where to turn for those original documents.

Linkage Analysis

The final avenue of research analysis is that of linking records to your ancestor and ensuring that you have the correct records for your them, rather than having conflated two individuals of the same name. Such conflation is more prevalent than you may suspect, especially the further back you go in your research. Additionally, names often turn out to be far more common than we ever suspected.

Questions to ask when trying to ensure all the records pertain to your ancestor include:

- What facts can you identify in a record that can be compared to another (*different*) record?
- Can you identify any discrepancies in a record (or a source)?

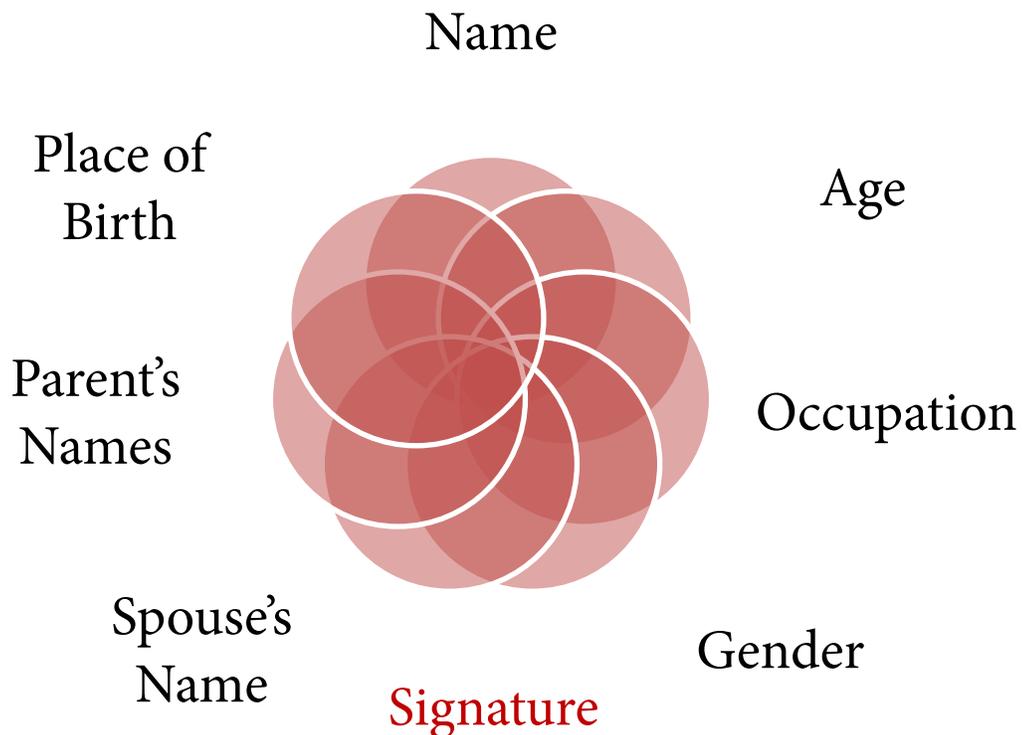
Tip: Work from the known to the unknown.

Remember that just because the name is the same, it does not automatically mean the record is for your ancestor. Haphazardly grabbing records, especially suggested by a genealogy site, could result in you recording a residence for your ancestor after he died, or a death that isn't his.

With every record you need to look to see everything it is telling you. Keep in mind the analysis of the source itself—consider why it was created and who supplied the information. The informant on a death record could be a child, grandchild, nurse at a hospital or other person with little knowledge of the deceased.

Work with information found in the record you know to be your ancestor's and see what details it suggests that will take you to another record that would belong to them.

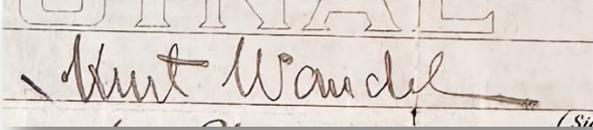
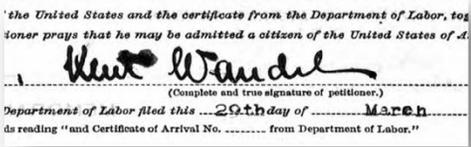
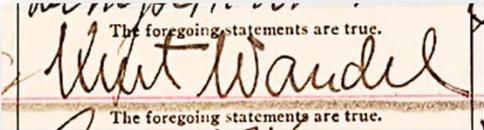
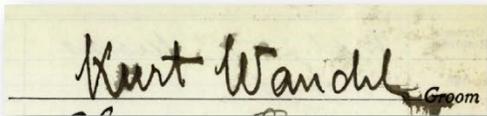
Consider how all those records should overlap:



While going through all the records, don't forget to pay attention to any place your ancestor may have signed the record. Marks versus signatures separate individuals. Likewise, matching signatures can help to offer support for the linkage of records that on the surface suggested different individuals.

Comparing Records

In addition to the usual comparison of information that you find from one record to another, if some of the records you have amassed were signed by the individual you are researching, don't forget to compare signatures!

	
1923 - Original Naturalization Certificate	1923 Naturalization Petition No. 57897
	
1934 NY Voter Registration, Mentioned 5 Nov 1923 Naturalization	1913 Marriage to Eloise Rowe

Suggested Bibliography

Books

Anderson, Robert Charles, *Elements of Genealogical Analysis* (Boston: New England Historic Genealogical Society, 2014)

Mills, Elizabeth Shown, *Evidence Explained; Citing History Sources from Artifacts to Cyberspace*, 4th ed. (Baltimore, Maryland: Genealogical Publishing Company, Inc., 2024)