

Getting Organized: Research, Files, Findings

Class 4: Organizing Your Findings

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(Some original work compiled by Ann G. Lawthers)

Whether you have used a FAN or a Cluster research approach, or you are just undertaking the beginning research of a new family, as you progress, you will find both positive and negative research results. The positive research comes with a document that you can file either in a physical folder or a digital one. Negative research is much more difficult to remember if you are not keeping track of it, as you have nothing tangible.

Genealogical Proof Standard

Created by the Board for Certification of Genealogists, the Genealogical Proof Standard (GPS) is designed to hold family historians to a specific level of research in the hopes that what we all share with each other is as accurate as it can be (learn more at: <https://bcgcertification.org/ethics-standards#genealogical-proof-standard-gps>) It calls for:

- Reasonably exhaustive research
- Complete and accurate source citations
- Testing the conclusions through analysis and correlation
- Resolution of conflicts found between the various evidence items
- Creating a soundly reasoned, coherently written conclusion

While you may be thinking that you are not striving to become a professional genealogist, the GPS offers a way for you to better evaluate the evidence you locate. It allows family historians a method of putting together a credible argument regarding a genealogical question, e.g. “Who are the parents of Polly Fuller?” If followed, you will feel more secure in your conclusions.

Reasonably Exhaustive Research

One of the most important aspects of the GPS is the “reasonably exhaustive research.” This means going beyond the suggestions supplied by online sites such as Ancestry.com and FamilySearch.org. While you can certainly take advantage of these suggestions, you want to do your due diligence with those suggestions by looking for other records that either support or refute the details found in the suggested record, especially if the name of your ancestors is common.

Analysis

Once you have acquired several sources and records that appear to all be for your ancestor, you want to analyze what you have by evaluating the accuracy and validity of the details found. Keep these items in mind when reviewing your research:

- Source: Original, Derivative, Authored
- Information: First-hand, Second-hand, unknown
- Evidence: Direct, indirect, negative

For more on working with records, you may want to view the webinar “It Was There All Along: How to Examine Records for Overlooked Clues and Details,” on AmericanAncestors.org (<https://www.americanancestors.org/video-library/it-was-there-all-along-how-examine-records-overlooked-clues-and-details>).

Sources vs. Records

As outlined in Robert Charles Anderson’s *Elements of Genealogical Analysis* (see Bibliography) the terms *source* and *record* are often used interchangeably, however, they are in fact two very different pieces to the whole.

A *source* is a coherent collection of *records* created by a single jurisdiction or a single author for a defined purpose. Likewise, a *record* is that portion of a *source* which pertains to a single event.

Tools to Organize Your Findings

Basic Tools

There are many ways to organize the research you compile, but you will want to consider a system that you find yourself comfortable with. Likewise, consider incorporating several tools, including:

- *Multi-Generational Chart* (also known in many genealogy programs as a Pedigree Chart): A road map of your direct lineage
- *Family Group Sheet*: A snapshot of a specific family that includes general life events about parents and children along with the names of the children’s spouses
- *Research Plan Template*: designed to focus on a specific goal in your research and includes space for information about the subject, the specific question to be answered, details and sources on what is currently known, tracking of record dates for reference regarding the places to be researched, working hypothesis, identifying the records you will need to research, and compiling the search strategy
- *Annotated Research Log*: A spreadsheet of general source types offering rows to record the sources and specific records examined along with information about when, who, and where you searched. Offers space for results and notes about what was undertaken.

Digital Tools

Combining the basic tools which are found in various genealogical apps as well as office apps, with other digital tools offers family historians a vast array of methods of tracking their research and their findings in a manner that allows for solid analysis. Among such digital tools, you may want to consider:

- Clooz (<https://clooz.com/>) – Identifies as an electronic filing cabinet where individuals are linked through records, not via family relationships
- Notebook apps
 - Microsoft OneNote (part of Microsoft 365)
 - Adobe Acrobat Pro (<https://www.adobe.com/acrobat/complete-pdf-solution.html>): Not only creates PDF documents but offers many features for highlighting, notes, additions, and editing of PDF documents (\$)
 - Evernote (<https://evernote.com/>): An online notebook/AI/screen clipping option (\$)
 - Joplin (<https://joplinapp.org/>): Open source note-taking app that can handle images, videos, PDFs, and create notebooks for various subjects (free, to share between computer and phone/tablet requires *paid* subscription to Joplin Cloud)

- GoodNotes (<https://www.goodnotes.com/>): A notebook app for computers and tablets which allows you to handwrite or type. Available for Apple, Windows and Android.
- Notability (<https://notability.com/>): A notebook app that can be used and shared across Apple platforms (Mac, iOS) and via the Web that offers notetaking, audio recording, editing (free version, has upgrades by *paid* subscriptions that offer more features).
- Spreadsheet app: Offers flexibility when creating an abstract form for record comparison
- Word processing app: Can be used in many different ways for abstracting, transcribing, and creating genealogical summaries with the ability to add footnotes or endnotes.

Timelines

Timelines draw your focus beyond the basic life events of our ancestors. Through this chronological approach, you can include many different types of events, both pertinent to the family and their greater historical context.

Inclusion of historical events may also offer insight into why you have been unable to find a specific record for a family member. Times of epidemics and war may result in deaths being either too numerous to record or individuals of a town dying far away. Including such items in the timeline can prove useful.

Working with Your Findings

Resist the temptation to assume family relationships and add people to your genealogy program or online tree without verifying. When analyzing your research findings, try to separate the hard facts from your assumptions. This will allow you to think outside the box, and you may be surprised at what you uncover!

Remember to use the tools you have at your disposal to assist you in organizing your previous research and focusing on the problem that needs to be solved. Re-examining the research you did previously, especially if you find yourself up against a brick wall, is essential to seeing what options may be available. Using the various forms and digital tools may reveal anomalies you had not previously recognized.

Clearly State Objective

Be clear in your objective—be cognizant of others who will read your research summary. Does your objective cover all the known information? Do you need to include background information?

- What is your genealogical question?
- Include information about
 - Primary Individual (Date/Place of Birth and Date/Place of Death- if known)
 - Primary individual's Spouse (Date/Place of Birth and Date/Place of Death- if known)
 - The names of the Primary Individual's Parents

Recognize Earlier Scholarship

Provide a short synopsis of the genealogical scholarship that has been published on this family or topic. Be sure to check some of the most popular genealogical journals and registers, as well as older lineage society applications.

Some volumes that you may want to seek, especially if working with New England and New York families are the many scholarly journals, such as:

- *The New England Historical and Genealogical Register*, vol. 1- (1847-) From its beginning the *Register* has been the most scholarly and important genealogical journal on both the New England and the national level, thanks to many decades of consistently high-quality editorship. Its hallmarks

are compiled genealogies (for up to five generations) of colonial New England families, English origins articles, transcriptions of original records, and methodological articles.

- *The American Genealogist*, vol. 1- (1922-) Begun by Donald Lines Jacobus as the *New Haven Genealogical Magazine* (changing to the present title in 1932), *TAG*, as it is known, devotes the majority of its space to high-quality, problem-solving articles that focus primarily on New England families.
- *The New York Genealogical and Biographical Record*, vol. 1- (1869-) Although the *Record* concentrates on the early families of Long Island, New York City and the lower Hudson River valley, a goodly number of these families had New England origins or connections, so the *Record* should always be checked.
- *The New England Quarterly*, vol. 1- (1928-) is primarily an historical and literary magazine. It is useful for background and context and may contain articles of interest in certain instances.
- *The Connecticut Nutmegger* has been the “journal of record” of the Connecticut Society of Genealogists, Inc. for 40 years.

Provide a Research Summary

Provide a detailed analysis of the documents that you were able to locate that are relevant to your research objective. Do not include arbitrary records—this will only confound your argument.

Address Anomalies

- Missing records
- Numerous Individuals with the same name
- Incorrect Information on a record or an incorrect published genealogy
- Present this information honestly
- Do not distort or underplay a record

Suggest Other Possibilities

- Cover all your bases, even if unlikely
- Does your conclusion jive with historical, geographical, and religious facts
- Conflating two persons? Creating two persons?

Draw a Conclusion

Like the clearly stated objective, your conclusion should also be succinct and organized. Do not provide any new information in the conclusion—just the facts as presented in the research summary.

Bibliography

Robert Charles Anderson, *Elements of Genealogical Analysis* (Boston: NEHGS, 2014).