



2024 VIRTUAL FAMILY HISTORY CONFERENCE

EXPANDING POSSIBILITIES

16-18 MAY

COMPENDIUM

PRESENTED BY:
NATIONAL GENEALOGICAL SOCIETY®
6400 Arlington Blvd., Suite 660 Falls Church, VA 22042-2318
703-525-0050 | 800-473-0060 | ngsgenealogy.org



Take your research to the next level when you add Ancestry® Pro Tools to your membership.



Push your discoveries further with tree-building tools that help you check for errors, filter people more efficiently, and knock down brick walls using DNA Match data.

 **ancestry®**



NATIONAL GENEALOGICAL SOCIETY®

2024 VIRTUAL FAMILY HISTORY CONFERENCE

16-18 MAY 2024

CONFERENCE COMPENDIUM

#NGS2024GEN

© 2024 National Genealogical Society, 6400 Arlington Blvd., Suite 660, Falls Church, VA 22042-2318. All rights reserved.

Copyright applies to the compiled material presented herein as the National Genealogical Society 2024 Family History Conference Program Compendium. Any copying, electronic manipulation, or other use of this matter, beyond the limitation of "Fair Use," is expressly prohibited without the specific permission of the National Genealogical Society.

Every lecturer retains specific, individual copyright for his or her submitted material.



GRIPSM

GENEALOGY INSTITUTE

REGISTRATION NOW OPEN

The GRIP Genealogy Institute offers exciting choices for both the virtual session and the in-person Pittsburgh session. The 2024 program features an array of topics, including AI for genealogy, advanced DNA, documentation, Virginia research, land, property, military, and church records.

Learn more, download the course catalog, and register at

grip.ngsgenealogy.org

23–28 JUNE 2024 | VIRTUAL

Advanced DNA Evidence

Blaine T. Bettinger, PhD, JD

Digging Deeper: Records, Tools and Skills

Paula Stuart-Warren, CG, FMGS, FUGA

Ireland and Northern Ireland Research, Part II

David Rencher, AG, CG, FUGA, FIGRS

Genealogical Organization: Increase Your Productivity

Kelli Jo Bergheimer

Mastering the Art of Genealogical Documentation

Thomas W. Jones, PhD, CG, FASG, FNGS, FUGA

Not Just Farmers: Records, Relationships, and the Reality of Their Lives

Cari Taplin, CG

Midwest Family History Research: Migrations and Sources

Jay Fonkert, CG

Tools and Strategies for Tackling Tough Research Problems

Kimberly T. Powell

Women and Children First! Research Methods for the Hidden Half of the Family

Judy G. Russell, JD, CG, CGL

AI Genealogy: From Basics to Breakthroughs

Steve Little

Imaging: Its Past, Present, and Future

Maureen A. Taylor and Rick Voight

14–19 JULY 2024 | PITTSBURGH

Advanced DNA Evidence

Blaine T. Bettinger, PhD, JD

Organizing and Analyzing Your DNA Tests: Hands-on Genetic Genealogy

Kelli Jo Bergheimer

Introduction to Ashkenazic Jewish Genealogy

Emily H. Garber

Marching Off to War: Advanced Military Research and Methodology

Michael L. Strauss, AG

Using US Church Records for Family History

Sunny J. Morton

Putting Those Records to Work

Judy G. Russell, JD, CG, CGL

Get Your Hands Dirty! A Workshop in Land and Property Records

Kimberly T. Powell

Working with Virginia Records from Jamestowne to the Civil War

Barbara Vines Little, CG, FNGS, FUGA, FVGS

Records Loss: Overcoming Destroyed, Missing, or Non-Extant Records.

Kelvin L. Meyers



CONTENTS

A Message from the NGS President	vii
A Message from the Program Chairperson	ix
A Message from the NGS Delegate Council Chair	x
About NGS	xiii
Conference Sponsors	xiv
Participating Organizations	xv
NGS Leadership	xvi
Conference Committees	xvii
Delegate Council Steering Committee	xix
SLAM Committee—Societies, Libraries, Archives, and Museums	xix
Acknowledgments	xxi
Social Media Policy	xxiii
Session Schedule	1
Speaker Biographies	12
Abbreviations	18
Speaker Materials	23
Directory of Exhibitors	203



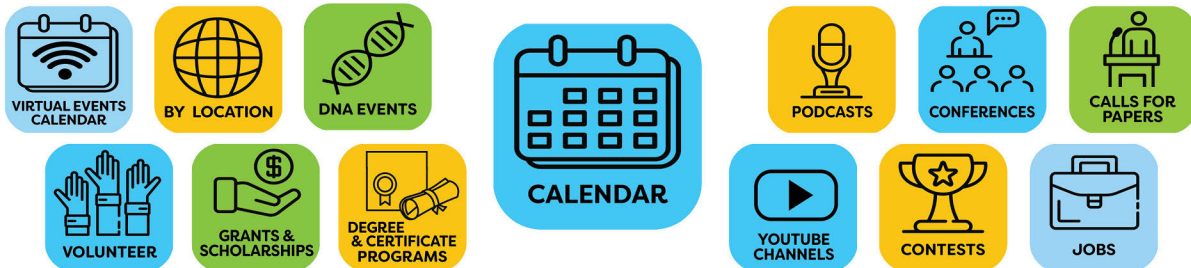
#NGS2024GEN

© 2024 National Genealogical Society, 6400 Arlington Blvd., Suite 660, Falls Church, VA 22042-2318. All rights reserved.

Copyright applies to the compiled material presented herein as the National Genealogical Society 2024 Family History Conference Compendium. Any copying, electronic manipulation, or other use of this matter, beyond the limitation of “Fair Use,” is expressly prohibited without the specific permission of the National Genealogical Society. Every lecturer retains specific, individual copyright for his or her submitted material.

Genealogy Education News and Events – All in One Place

Welcome to ConferenceKeeper



ConferenceKeeper – one of the most important assets for family history researchers – offers a free comprehensive event calendar, weekly newsletter, and much more.

✿ Stay Up-to-Date on the Latest Genealogy News

We gather the latest genealogy news and share it in a once-weekly emailed newsletter. You can easily stay informed on the latest trends in family history research and quickly access educational opportunities all over the world: virtual, hybrid, and in-person. Many are free or for a nominal cost.

✿ Never Miss a Genealogy Event or Opportunity

ConferenceKeeper keeps track of upcoming genealogy lectures, webinars, conferences, workshops, institutes, and more. Check our website calendar so you don't miss an event on a topic relevant to you whether hosted by a society, library, museum, or individual experts. Browse the calendar and access registration all in one place.

✿ Streamline Your Time and Genealogy Education

We consolidate genealogy education opportunities in one platform, summarize events in our calendar and blog, and offer a weekly newsletter so you are among the first to learn the latest genealogy news. All in one place! Reduce emails and save time with ConferenceKeeper, the most complete collection of family history related events and education news on the internet.



ConferenceKeeper.org

Your genealogy education assistant



A MESSAGE FROM THE NGS PRESIDENT

We welcome you to our 46th annual Family History Conference, where you will expand your possibilities and take your genealogical knowledge to the next level.

We want to acknowledge and honor the Indigenous People upon whose ancestral homeland we convene. As we "meet" nationwide, we recognize and offer our respect to over 574 nationally recognized tribal nations and their millions of ancestors who lived here for more than 25,000 years. Indigenous people are here and thriving, and we welcome them to this conference.

This year's conference theme, *Expanding Possibilities*, focuses on innovation and finding new ways to solve problems. Artificial intelligence is center stage at this year's virtual conference. Both days start with plenary sessions devoted to the topic, and several other lectures feature AI topics.

Pre-conference workshops and a virtual tour start on Wednesday, 15 May 2024, with the BCG Education Fund Workshop, *Putting Skills to Work*. On Thursday, 16 May 2024, three workshops occur: *Overcoming Difficult Handwriting*, *All About the Accredited Genealogist® Credential*, and the BCG *Certification Seminar*. A virtual tour of the new International African American Museum in Charleston, South Carolina, is included in your registration. In addition, genealogy organizations enjoy a full day of dedicated programming—the Delegate Council meeting, the FOCUS on Genealogy Organizations event, and the ever-popular SLAM! Idea Showcase.

Explore the Virtual Expo Hall and connect with sponsors and exhibitors. The Expo Hall opening is Thursday, 16 May 2024, from 7:15 p.m.–9:30 p.m. ET, or visit during your breaks from education sessions. Collect stamps in each booth, and you may win a 7-night

stay at the Salt Lake Plaza Hotel next door to the FamilySearch Library.

The James Dent Walker Memorial Lecture Series, co-hosted by NGS and the Afro-American Historical and Genealogical Society (AAHGS), features four exceptional sessions. Featured lecturers LaBrenda Garrett-Nelson, Shelley Viola Murphy, Leslie Anderson, and Ari Wilkins cover topics including equity court files, the stories of Black soldiers, and researching rural ancestors. The Board for Certification of Genealogists (BCG) hosts the BCG Skill-Building track featuring ten fantastic lectures from certified genealogists including Yvette Hoitink, Karen Stanbary, Stephanie O'Connell, LaBrenda Garrett-Nelson, Tom Jones, Rebecca Koford, Nancy Peters, Dana Palmer, Sharon Hoyt, and David Ouimette. Other conference lecture topics include DNA, military records, writing, methodology, ethnic and LGBTQIA research, technology, and more.

The Whova online event platform lets you attend sessions and easily interact with friends and colleagues. Join meetups, enter contests, and have online chats on the Whova app or website. Whova includes the latest conference information, the virtual Expo Hall, daily announcements, and all your document downloads. Best of all, every lecture is available for viewing by every registrant, whenever and wherever you wish, through 15 August 2024.

An essential part of our success is the generous support of our sponsors. Thank you to Ancestry, FamilySearch, Family Tree Maker, the Board for Certification of Genealogists (BCG), FamilyTree DNA, Geni, MyHeritage, Permanent.org, Vivid-Pix, and the Association of Professional Genealogists (APG).

We also thank the societies and organizations that sponsor lectures

and workshops, including AAHGS, Ancestry, APG, BCG, the BCG Education Fund, Family Tree Maker, FamilySearch, FamilyTree DNA, the International Commission for the Accreditation of Professional Genealogists, the New England Historic Genealogical Society, and Vivid-Pix.

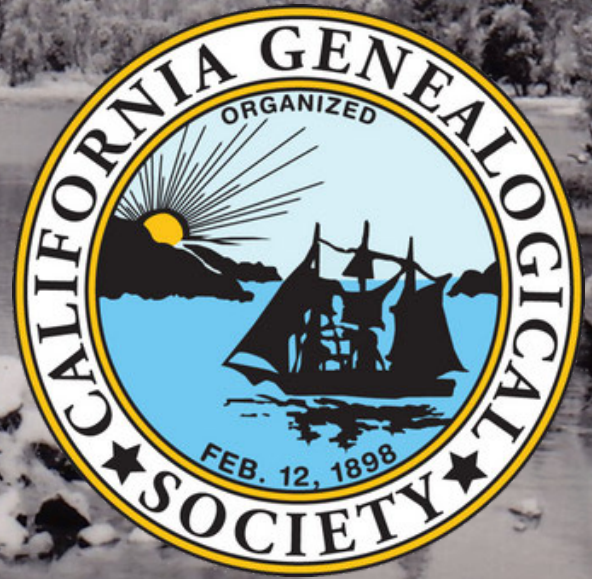
Thank you to our conference team, including program chair Matt Berry; Caitlin Gaborow and Karen Forbes from Delaney Event Management; our production company Playback Now, particularly Jon Galucki, Tom Galucki, and Doug Martin; and our fantastic volunteers. And special thanks to the excellent NGS team, including Deb Cyprych, Margaret Fortier, Terry Jennings, David King, Steve Little, Matt Menashes, Tami Mize, Martha Niehaus, Gena Philibert-Ortega, Patricia Reed, Mary Roddy, Kristi Sexton, Kate Smith, and Susan Yockey. Their tremendous work makes the NGS conference an exceptional experience.

Finally, thank you for supporting the National Genealogical Society. We hope this year's conference expands your genealogical possibilities.

Kathryn M. Doyle,
President



#NGS2024GEN



WHAT WE CAN
DO FOR YOU



Research

In addition to our extensive online database, we have research services available for members and non-members.



Connect

Our educational events, in-person programs, and historical excursions bring people together.

We can help you **rediscover** your family histories.

Whether you have Gold Rush ancestors or have no family connection to California, you will find extensive support for your genealogy research at the California Genealogical Society.

Our library is located in Oakland, California. Come visit our wonderful book collection and take a look at our maps, vertical files, manuscripts, and other resources unique to CGS.

CaliforniaAncestors.org

MORE THAN

410,000

NAMES IN OUR SEARCHABLE CGS NAMES INDEX



Scan
for more
information



 (510) 663-1358

 Library@CaliforniaAncestors.org



CGS Library
2201 Broadway, Suite LL2
Oakland, California 94612



A MESSAGE FROM THE PROGRAM CHAIRPERSON

Accuracy is fundamental to genealogical research. Without it, a family’s history would be fiction.”¹

It is with this in mind that we assemble the speaker program for the NGS Family History conference each year. As genealogists, we strive to expand our conclusions about our ancestors and their lives. We can have confidence in the accuracy of our genealogical conclusions when we have done reasonably exhaustive research, we understand and identify the sources of our evidence, we have analyzed and correlated all the evidence, we have logically resolved any conflicts in that evidence, and we have expressed all of this in a soundly reasoned written conclusion. The lectures being presented at this year’s conference are all intended to help you meet this standard.

This past year has seen the emergence of an exciting new technology with the potential to expand the possibilities of our genealogy beyond our imaginations. Artificial Intelligence, or specifically, the availability of consumer-oriented large language models, has the potential to supercharge our research. This year’s plenary sessions will discuss the possibilities and the ethics of this technology. Other sessions will discuss specific ways genealogists can use this new tool.

Expand the scope of your research possibilities by learning about records that are especially valuable to specific cultural communities. The lectures on Asian American, German, Irish, Jewish, LGBTQ+, Mexican American, and Native American genealogy are suitable for genealogists of all backgrounds and specialties. This is especially true for the four lectures that comprise this year’s James Dent Walker Memorial Series on African American genealogy.

Congratulations on choosing to expand your genealogical education at the National Genealogical Society 2024 Virtual Family History Conference. I hope that you will take time before 15 August 2024 to watch most, if not all, of the fifty lectures that we are presenting.

Matthew Blaine Berry, CG

NGS 2024 Family History Conference Program Chair

¹ Genealogy Standards, 2nd ed. rev. (Washington, DC : Board for Certification of Genealogists, 2019), xix.



#NGS2024GEN



Welcome to the 2024 Virtual Family History Conference, EXPANDING POSSIBILITIES, and pre-conference events on 16 May. The NGS Delegate Council is an advisory body for genealogical member organizations of NGS – societies, libraries, archives, museums, and any other institution or organization in the genealogy and family history community. Each member organization is invited to have one person serve as a delegate to the Council. Our purpose is “Building the Community of Genealogy Organizations through Collaboration, Communication, and Counsel.” Delegates offer advice on genealogy and family history-related issues to the NGS Board of Directors and share information and resources with each other. The Delegate Council meeting kicks off a day of organization-related events on 16 May.

OUR PURPOSE IS “BUILDING THE COMMUNITY OF GENEALOGY ORGANIZATIONS THROUGH COLLABORATION, COMMUNICATION, AND COUNSEL.”

This year, FOCUS offers learning opportunities for organization leaders and volunteers centered on the theme of public outreach and engagement. It is another way to share ideas and successes with others in the community. The motivational keynote by Dr. Tonya Matthews of the International African American Museum will give you insights into the museum’s launch and how to expand public outreach, engage volunteers, and grow our community. You can then attend three of the nine breakout sessions live and participate in Q&A on 16 May. Each person registered can watch the other session recordings until 15 August in the Whova app. With America’s 250th birthday coming up in 2026, this event will help organizations prepare and position themselves to show the value of genealogy research and how family stories are the story of our country during this historic moment.

After FOCUS, join us for the SLAM! Idea Showcase program. This showcase highlights outstanding projects, programs, resources, and practices by organizations. Celebrate the winners and be inspired to create similar programs or projects in your organization. As in previous years, all the videos will be on the NGS YouTube channel to watch at any time.

Together, we strengthen the genealogy and family history community.

Karen Melohon

NGS Delegate Council Chair



#NGS2024GEN



Advanced Skills in Genealogy

A Certificate Course from the National Genealogical Society

Mastery of family history research skills is the basis for building an accurate genealogy. The National Genealogy Society (NGS) has designed a course specifically for this purpose called Advanced Skills in Genealogy to support intermediate to advanced genealogists.

This institute-level, standards-based course written by genealogy education experts helps students master genealogical records and methodology. Students who complete the course will earn a certificate in Advanced Skills in Genealogy.

Students receive guidance in sixteen significant types of genealogical records, analysis and correlation of information, and methodologies and strategies to meet genealogical challenges. The course teaches advanced skills through the use of extensive course materials, case studies,

NGS Quarterly and *NGS Magazine* articles, video presentations, live Zoom sessions, and hands-on activities. Practical assignments provide an opportunity to reinforce concepts and build skills for future research. Mentors grade key assignments and provide personalized feedback.

The Advanced Skills course will empower you to discover more records and recognize if they are the *correct records* for the family you are researching.

For decades, genealogists from beginner to advanced have practiced and developed their skills with NGS's home study courses. NGS continues to provide the best online genealogical courses to help you succeed in building and preserving your family history.



NATIONAL
GENEALOGICAL
SOCIETY

nsgenealogy.org | Special rates for NGS Members

NGS Education. Build Your Skills. Build Your Family History.



NATIONAL GENEALOGICAL SOCIETY®

6 THINGS TO KNOW ABOUT ORGANIZATIONAL MEMBERSHIP



Delegates

Official Org
Reps
to NGS

Organization
Membership
\$75 or \$150
per Year
Depending on Size

TOP BENEFITS FOR ORGANIZATIONS

Seat on the Delegate Council
Info & Answers White Papers
FOCUS and SLAM! Idea Showcase Events



Advertise Events via



Genealogy CALENDAR OF EVENTS
ConferenceKeeper.org



Get Support for
Community Outreach



Bylaws

We Review Your
Bylaws for FREE



nsgenealogy.org



The National Genealogical Society (NGS) is a non-profit membership organization dedicated to advancing the family history community. Founded in 1903, NGS was the first national US genealogical organization. Today its members include individuals, family organizations, societies, libraries, archives, and museums. NGS strives to encourage collaboration in the genealogical community and best practices in advocacy, education, preservation, and research to enable people of all cultures to discover the past and create a lasting legacy.

By teaching research skills, NGS has helped generations of Americans find their ancestors and family stories to pass on to their descendants. NGS offers guidance for everyone, from the beginner to the most advanced family historian, through its online courses, books, webinars, the annual NGS Family History Conference, GRIP Genealogy Institute, and acclaimed articles in *NGS Magazine*, and the *National Genealogical Society Quarterly*.

OUR MISSION IS TO INSPIRE,
CONNECT, AND LEAD THE
FAMILY HISTORY COMMUNITY.

WE FOSTER COLLABORATION
AN BEST PRACTICES IN ADVOCACY,
EDUCATION, PRESERVATION,
AND RESEARCH.

WE ENABLE PEOPLE, CULTURES,
AND ORGANIZATIONS TO
DISCOVER THE PAST AND
CREATE A LASTING LEGACY
FOR GENERATIONS. PAST. PRESENT. FUTURE.

The NGS website, ngsgenealogy.org, offers many free resources and tools to get everyone started in family history. It also recommends pathways to learning, from Getting Started to Building Advanced Skills, and even becoming a professional genealogist. Visitors will find advice on records, methodology, using DNA, tips and techniques to build your family tree, advice for family historians, societies, and organizations and more.

Headquartered in Falls Church, Virginia, NGS has members in all fifty of the United States.



CONFERENCE SPONSORS -THANK YOU!

Platinum



Gold



Silver



Bronze



#NGS2024GEN

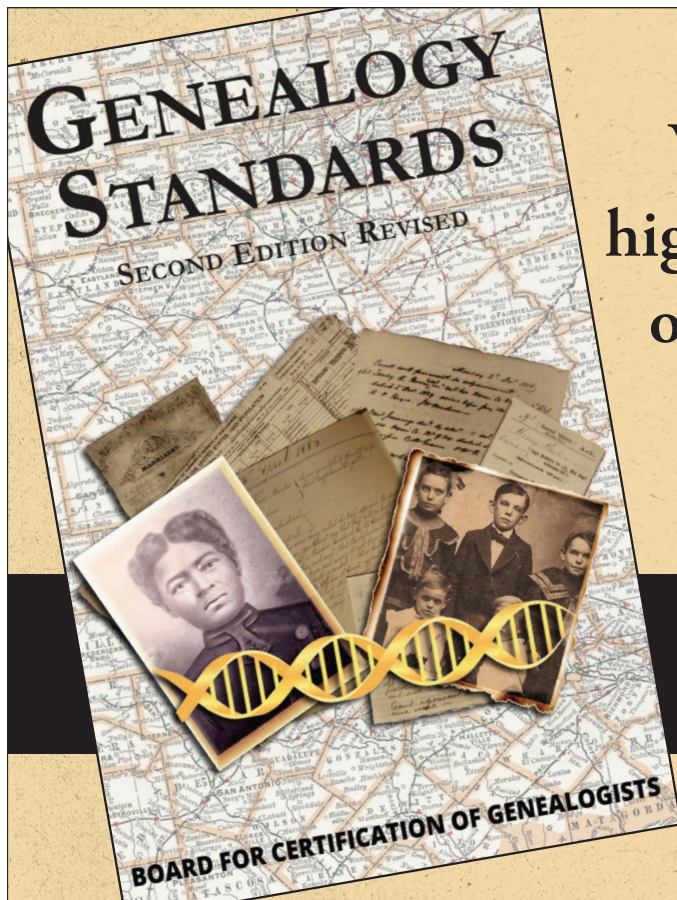


PARTICIPATING ORGANIZATIONS

Afro-American Historical and Genealogical society (AAHGS)
Ancestry®
Association of Professional Genealogists (APG)
Board for Certification of Genealogists (BCG)
BCG Education Fund
Family Tree Maker
FamilySearch

FamilyTree DNA
International African American Museum (IAAM)
International Commission for the Accreditation of Professional Genealogists (ICAPGen)
MyHeritage
New England Historic Genealogical Society (NEHGS)
Vivid-Pix

#NGS2024GEN



We promote *attainable, high, and uniform standards of competence and ethics among genealogists.*



BOARD FOR CERTIFICATION OF GENEALOGISTS®
www.BCGcertification.org



NGS Board of Directors

President	Kathryn M. Doyle (California)
Vice President	Ellen Pinckney Balthazar (Texas)
Vice President, Society and Organization Management	Cheri Hudson Passey (South Carolina)
Secretary	Rev. Symeon (Samuel) Williams (New Jersey)
Treasurer	Douglas Klein, CPA (Ohio)
Directors	Janice Cross-Gilyard (New Jersey) Ed Donakey (Utah) Lisa Fanning (Maryland) Sara Gredler, CG, AG (Colorado) Marlis Humphrey (Florida) Andre Kearns (Washington, DC) Judy Nimer Muhn (Michigan) David E. Rencher, AG, CG, FUGA, FIGRS (Utah)
Past President	Benjamin B. Spratling, JD (Alabama)
Executive Director	Matt Menashes, CAE (Maryland)

NGS Team

Executive Director	Matt Menashes, CAE
Accounting	Terri Crowder Luis Padilla Rashel Triplett
AI Program Director	Steve Little
ConferenceKeeper Manager	Tami Osmer-Mize
Development Counsel	David P. King
Education Director	Kimberly Powell
Education Course Manager	Patricia Reed
GRIP Genealogy Institute Co-Managers	Kristi Sexton Gena Philibert-Ortega
Member Services Manager	Susan Yockey
NGS Magazine Editor	Deb Cyprych
NGS Quarterly Co-Editors	Margaret R. Fortier, CG Mary Kircher Roddy, CG
Organizations and Communities Manager	Kate Smith

#NGS2024GEN



CONFERENCE COMMITTEES

NGS Conference Committee

Conference Program Chair Matthew Blaine Berry, CG

FOCUS Co-Chairs Cheri Hudson Passey
Kate Smith

Event Management Delaney Event Management
Playback Now

Marketing and Communications

Ellen Pinckney Balthazar
Kathryn M. Doyle
Terry Jennings
Terry Koch-Bostic
Matt Menashes, CAE
Tami Osmer Mize
Kristi Sexton
Kate Smith
Susan Yockey

#NGS2024GEN



NATIONAL GENEALOGICAL SOCIETY®

MemberConnects!

Taking Your Genealogy Research Skills Beyond Family History

Lisa Fanning, Host
Alison Wilde
Tristan L. Tolman, AG
Bonnie Holley
Tynan Peterson
Rhonda Kevorkian

Zoom Event

29 May 2024, 8:00 p.m. ET
bit.ly/NGSMemberConnects29May2024



SCAN ME



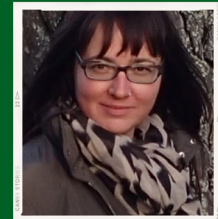
Lisa Fanning



Bonnie Holley



Alison Wilde



Tynan Peterson



Tristan Tolman



Rhonda Kevorkian



Family Tree Maker[®]



Preserving family histories
since 1989.

<http://familytreemaker.com/ngs2024>



Delegate Council Steering Committee

- Karen Molohon, chair
- Matt Weismantel, vice chair
- Ashley Craig
- Judy Fenner
- Kate Huffman, secretary
- Kathleen Kaldis
- Cheri Hudson Passey, vice president for society and organization management
- Charity Rouse, MLS
- Kate Townsend, CG, immediate past chair
- Amy Beth Urman
- Eric Vaughn
- Evan Wilson

SLAM! Ideas Showcase Committee

- Kris Rzepczynski, MLIS, MA, chair
- Melissa Barker, Certified Archives Manager
- Cara Griggs, MSLIS, Certified Archivist
- Taneya Koonce, MSLS, MPH
- Jessica Trotter, MSI
- Ari Wilkins
- Special thanks to SLAM! Idea Showcase emcee
Judy G. Russell, JD, CG, CGL

#NGS2024GEN

Welcome to Permanent.org,

a non-profit storage platform dedicated to empowering generations by preserving your family history and legacy.



- \$10 a gigabyte with no subscription fees
- Legacy Planning features
- Collaborative sharing capabilities
- Handy mobile and web app

Sign up at
permanent.org/family-legacy

FIND YOUR STORY IN VIRGINIA'S PAST

The Library is the world's most comprehensive resource for exploring the commonwealth's history, culture and government.

Visit in person or online to find research guides and indexes, digital collections, genealogy workshops and much more.

Don't miss our current exhibition

INDIGENOUS PERSPECTIVES

Open through Aug. 17, 2024!



LIBRARY OF VIRGINIA



**START
HERE**

WWW.LVA.VIRGINIA.GOV



ACKNOWLEDGMENTS —THANK YOU!

THE VOLUNTEERS

For their countless hours spent in service to NGS and the genealogical community.

THE STAFF OF THE NATIONAL GENEALOGICAL SOCIETY

For their many contributions of time, talent, and collaboration.

THE SPEAKERS

For their commitment to and exemplification of the highest standards of professional research and continuing education.

THE EXHIBITORS

For their continued support of our national conferences and their dedication to providing the best and latest materials, information, and services.

THE SPONSORS

For their invaluable monetary and enthusiastic support of our national conference.

THE ATTENDEES AND THE GENEALOGICAL COMMUNITY

For your interest in family history and your search for the best in knowledge, resources, and techniques that make this conference possible.

THE NGS BOARD OF DIRECTORS

For their dedication and hard work to link the future with the past.

#NGS2024GEN



Join fellow ancestral researchers as an IGSI member

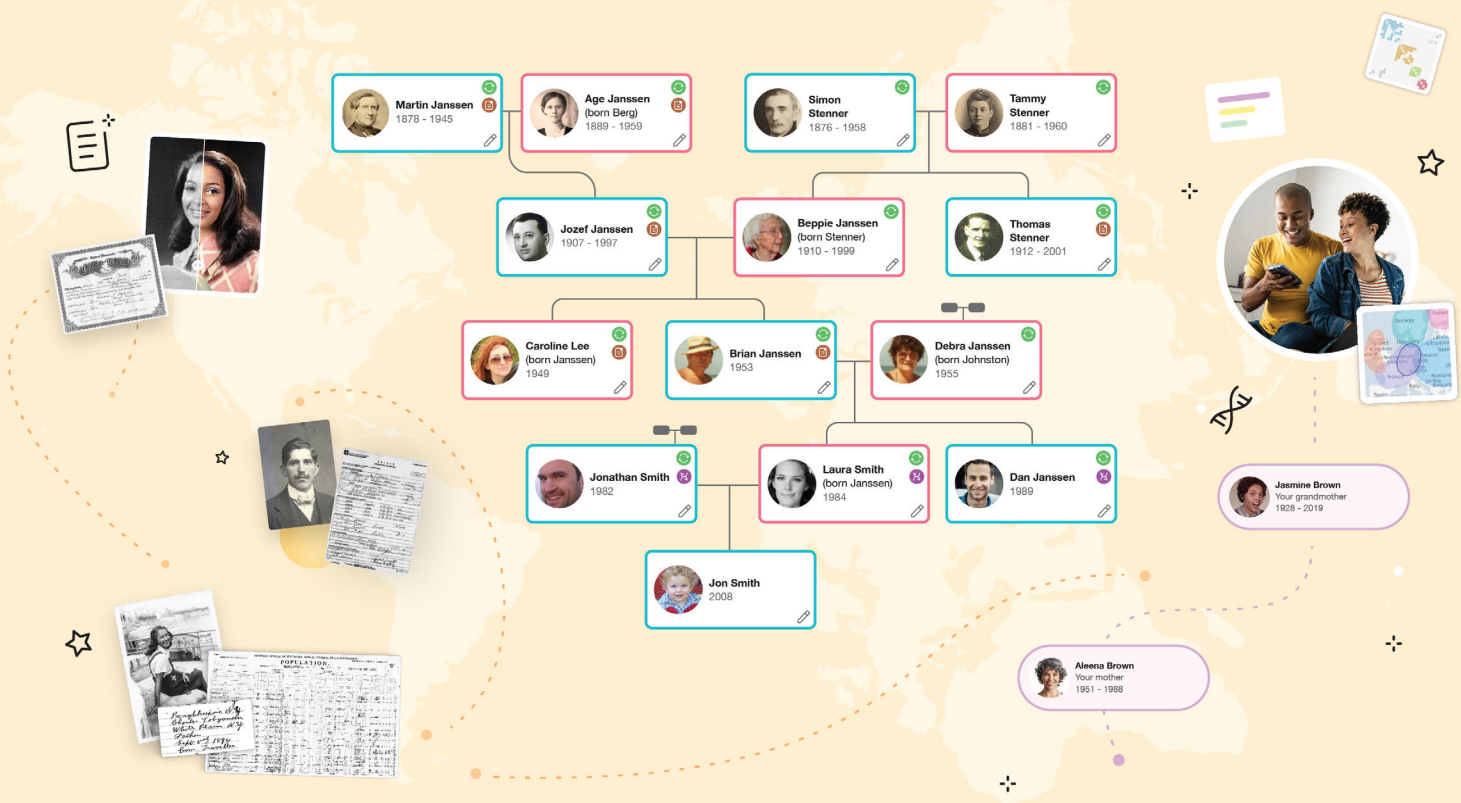
The exceptional benefits include access to monthly educational events, powerful research tools on our website, and the largest Irish reference collection in the Midwest of North America. Visit our website at irishgenealogical.org or scan the QR code below.



Based in Mendota Heights, Minnesota near the Minneapolis - St. Paul (MSP) international airport, where our library collection is located.

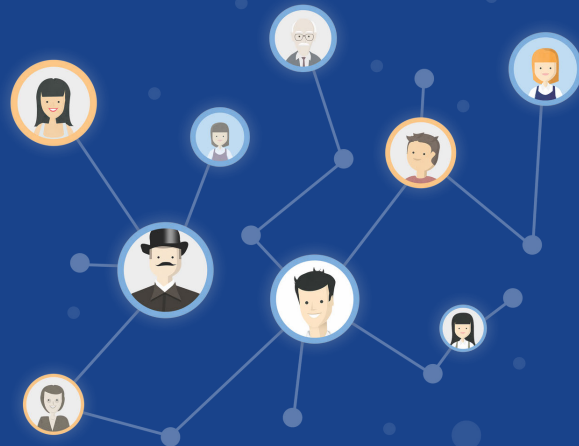


Uncover Your Global Roots



Geni
A MyHeritage Company

Home of the World Family Tree



Sign up for FREE, collaborate with millions of genealogists, and discover your connection hundreds of millions of people.



NGS does not permit screenshots, photography, audio, or video recordings of any presentations, including slides and handouts, at the NGS 2024 Virtual Family History Conference. All programs presented by NGS and its speakers, 16-18 May 2024, presented online, are protected by copyright. The handouts contained in the conference compendium are for your use only. You may print a copy for easy reference but not replicate, share, or distribute.

NGS contracts with Playback Now to video record lectures of speakers who provide their written consent.

NGS encourages participants to connect with others using the Whova app and via the “chat” feature during virtual sessions during the conference week.

NGS permits and encourages the use of social media such as Facebook, Instagram, and blogging to summarize, highlight, excerpt, review, critique, and promote the presented materials, handouts in the compendium, and the conference in general, provided that

- Copyright law is observed;
- Verbatim information is limited to a few quotes; and
- The author or speaker is referenced and cited appropriately.

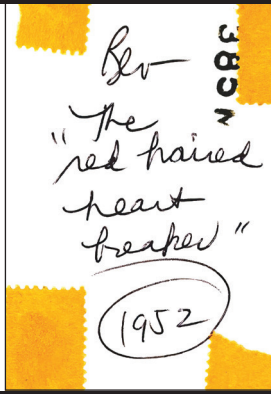
Follow NGS on Social Media 16-18 May 2024



#NGS2024GEN

- Follow us on Instagram ([@ngsgenealogy](#)).
- Like us on Facebook ([facebook.com/ngsgenealogy](#)).
- Use the conference hashtags #NGS2024GEN on all social media posts.
- Highlight and comment on the program content but **do not share any of the materials** being presented in detail which is a violation of copyright.
- Chat about products and services in the Virtual Exhibit Hall on **Whova**.
- Provide feedback to the NGS staff and the conference committee by participating in conference surveys.
- Use **Whova** to provide feedback for individual sessions.
- Provide feedback to NGS staff and the Program Committee by reviewing sessions.

The Stories You Could Tell... Now You Can!

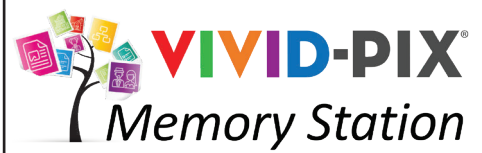


Don't Let Your Memories Fade™



Vivid-Pix.com

In celebration of
National Photo Month
Mental Health Awareness Month
Mother's Day & Father's Day



SAVE \$50 OFF
Memory Station Bundles

ENTER CODE: **PHOTO2024**
in the cart at checkout.
Valid until 6/30/24.

RESTORE
SAVE \$10 OFF
RESTORE Software

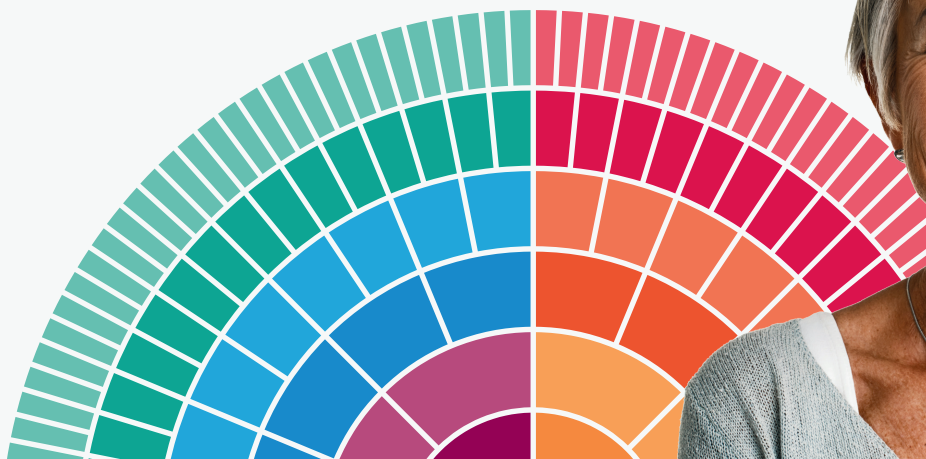


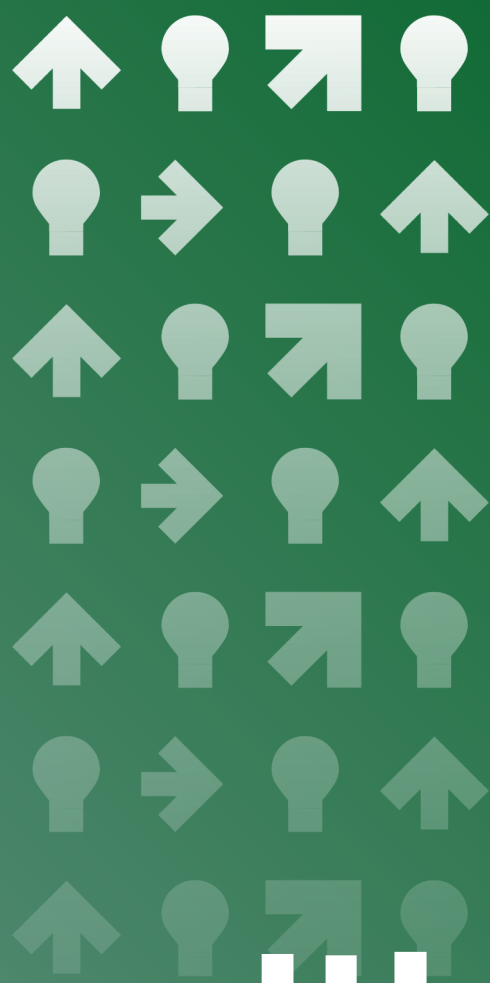
FamilyTreeDNA

Proud Silver Sponsor of the NGS 2024 Family History Conference

Explore your autosomal DNA, mtDNA, and Y-DNA to discover more about your genetic ancestry and break down brick walls.

Visit the **FamilyTreeDNA virtual booth** at the NGS 2024 Family History Conference.





SESSIONS SCHEDULE



THURSDAY SCHEDULE—16 MAY 2024

2:00 P.M. ET | 1:00 p.m. CT | 12:00 p.m. MT | 11:00 a.m. PT

FOCUS Plenary Session **Outreach and Engagement Lessons from Bringing the New International African American Museum to Life**
Tonya M. Matthews, PhD
 Find inspiration; a renewed sense of mission and purpose for your genealogy organization; and motivation to expand public outreach, engage volunteers, and grow your community. Dr. Tonya Matthews, president, and CEO of the International African American Museum, shares lessons from the launch of one of the country's newest and most compelling museums.

3:15 P.M. ET | 2:15 p.m. CT | 1:15 p.m. MT | 12:15 p.m. PT

FOCUS101 Fabric of the Past: Teaching Local and Family History Research to School Teachers
Charity C. Rouse, MLS
 Find out how Spartanburg County Public Libraries worked with the University of South Carolina-Upstate on a workshop with a National Endowment for the Humanities grant.

FOCUS102 Street Genealogy: Family History in a Parking Space PopUp
Shamele Jordon
 Take to the streets to share the fun of family history. Learn from the Genealogical Society of Pennsylvania and their partnership with other organizations and a TV show.

FOCUS103 Using Multimedia Approaches for Public Family History Outreach to Include Diverse and Marginalized Populations
Marcia Johnson, MBA, MPA, RHIA
 The National Grigsby Family Society shows how to plan, fund, and implement innovative multimedia to reach audiences, including diverse and marginalized populations in family history.

4:30 P.M. ET | 3:30 p.m. CT | 2:30 p.m. MT | 1:30 P.M. PT

FOCUS201 Branch Out: How to Partner Societies with State or Local Libraries
Korina Tueller, MLIS, and Linda Caldwell McCleary, MLS
 Learn the ins and outs of the Arizona State Library, Archives, and Public Records and Arizona Genealogical Advisory Board partnership for Genealogy Day and how to launch a successful event.

FOCUS202 Cemetery Digitization Project: Engaging Volunteers and the Community to Save History
Lynne Deese
 From digitization to online publication, the story of this project will share how Wake County Genealogy Society engaged volunteers and worked with partners to create a valuable community resource.

FOCUS203 We Are Three Lakes: Genealogy + History = Community
Marie E. Byatt
 The Three Lakes Genealogical Society explains how the We Are Three Lakes website engages their community and brings people together by showcasing genealogy and history.

#NGS2024GEN



THURSDAY SCHEDULE—16 MAY 2024

5:45 P.M. ET | 4:45 p.m. CT | 3:45 p.m. MT | 2:45 p.m. PT

FOCUS301 Creating an Exhibit and Celebration that Captures Hearts and Gets Attention

Marcia Fraser

Learn how the Williamson County Public Library Special Collections Department's Black History Month program engages the community and gets television and online promotion.

FOCUS302 Growing Membership and Increasing Value with a PBS Affiliate Partnership

Heather O'Hara

Find out details of the Maryland Genealogical Society's collaboration with Maryland Public Television to provide virtual events on genealogy and cultivate a mutually beneficial and ongoing relationship.

FOCUS303 Densho's Story: Preserving and Sharing History by Leveraging Technology

Caitlin Oiye Coon

Densho preserves and shares the history of Japanese American incarceration during World War II. Discover how they leverage digitized collections and educational tools to connect communities with the past.

EVENING EVENTS (OPEN TO FOCUS, SLAM!, AND CONFERENCE REGISTRANTS)

7:00 P.M. ET | 6:00 P.M. CT | 5:00 P.M. MT | 4:00 P.M. PT

SLAM! Idea Showcase

Judy G. Russell, JD, CG, CGL

The 2024 SLAM! Idea Showcase highlights outstanding projects and programs by societies, libraries, archives, museums, and other institutions (SLAM). This annual event began in 2021 to share creative and innovative projects, programs, resources, and practices with others; promote collaboration, networking, and collegiality among information providers; and provide a format in which individuals and organizations can learn from one another to strengthen the genealogy and family history community

7:15 P.M. ET | 6:15 P.M. CT | 5:15 P.M. MT | 4:15 P.M. PT

Virtual Expo Hall Opening

Matt Menashes, CAE

Join us for a few words from our host before browsing the virtual expo hall.



THURSDAY SCHEDULE—16 MAY 2024

11:30 A.M. ET | 10:30 A.M. CT | 9:30 A.M. MT | 8:30 A.M. PT

VIRTUAL TOUR

International African American Museum

Tonya M. Matthews, PhD

The International African American Museum (IAAM) explores the history, culture, and impact of the African American journey on Charleston, South Carolina, the nation, and the world—shining light and sharing untold stories of the diverse journeys, origin, and achievements of descendants of the African Diaspora. The Museum's Center for Family History (CFH) inspires and educates African Americans to find their forgotten family stories. CFH provides the tools, resources, passion of purpose—and a deep reservoir of knowledge—to support African Americans in adding their family stories to the American historical narrative.

2:00 P.M. ET | 1:00 P.M. CT | 12:00 P.M. MT | 11:00 A.M. PT

WORKSHOP | ALL | T101

What the Heck Does That Say? Overcoming Difficult Handwriting

Pam Vestal

One of the biggest hurdles we face in genealogy is the seemingly illegible handwriting in our ancestors' records. Whether you wrestle with colonial penmanship or with hard-to-read contemporary documents, we'll explore twenty techniques that can help!

4:30 P.M. ET | 3:30 P.M. CT | 2:30 P.M. MT | 1:30 P.M. PT

SEMINAR | ALL | T201 | Sponsored by ICAPGen All About the Accredited Genealogist® Credential

Jenny Hansen, AG, AGL, and Lisa Stokes, AG

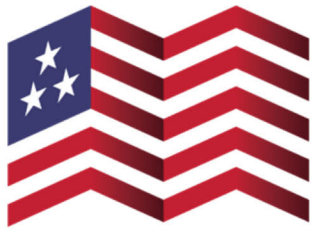
Do you have what it takes to become an Accredited Genealogist? AG professionals will present preparation tips to successfully complete the accreditation process.

5:45 P.M. ET | 4:45 P.M. CT | 3:45 P.M. MT | 2:45 P.M. PT

SEMINAR | ALL | T301 | Sponsored by Board for Certification of Genealogists BCG Certification Seminar

Shannon Green, CG, and Darcie Posz, CG, FASG

In this interactive forum, current associates share various pathways to certification and how to begin.



VETERAN BOUNTY LAND RECORDS



A PRESERVE THE PENSIONS PROJECT

War of 1812 • Mexican War • Frontier Conflicts

Donate to preserve, index, and digitize the records of individual soldiers and their families from these wars. These 360,000 records contain records such as family bibles, original signatures, names of heirs, letters, discharge papers, and descriptions of service.



PRESERVE
the Records



HONOR
their Memory



EDUCATE
our Youth

This project will help ensure that tens of millions of Americans can fill in the missing pieces of their family stories! Find out more about supporting this worthy cause by visiting <https://bit.ly/VBLCampaign>.



A project of the
National Genealogical Society

Stop paying for your passion.



NATIONAL GENEALOGICAL SOCIETY®

Grouper works with health plans to cover your NGS membership.



GENEALOGY

Grouper

Eligible members receive a check directly from Grouper to cover their NGS membership dues. It's a simple, hassle-free process that ensures you enjoy uninterrupted access to our programs and events.

ngsgenealogy.org/grouper-covers-your-dues



SESSION SCHEDULE

ALL-All Levels | INT-Intermediate
INT-ADV-Intermediate-Advanced | ADV-Advanced

FRIDAY SCHEDULE—17 MAY 2024

#NGS2024GEN

11:00 a.m. ET 10:00 a.m. CT 9:00 a.m. MT 8:00 a.m. PT	12:30 p.m. ET 11:30 a.m. CT 10:30 a.m. MT 9:30 a.m. PT	2:30 p.m. ET 1:30 p.m. CT 12:30 p.m. MT 11:30 a.m. PT
<p>PLENARY SESSION Artificial Intelligence and Genealogy: The First Year and Onward! <i>Steve Little</i> Uncover the power of AI in genealogy from the perspective of individual researchers. Learn about practical AI tools and methods that can revolutionize personal genealogical investigations, paving the way for understanding AI's broader impact in the field.</p>	<p>BCG SKILLBUILDING INT-ADV F101 Four Farms, Four Names: From Research Report to Award-Winning NGSQ Article <i>Yvette Hoitink, CG, QG</i> Research reports helped solve a question of identity and parentage in the Netherlands. The author shares her process for researching and writing an NGSQ case study. PAGE: 25</p>	<p>BCG SKILLBUILDING INT-ADV F201 Flip it!—A Case Study—Negative Chromosome Painting Reveals Misattributed Parentage <i>Karen Stanbary, MA, LCSW, CG</i> Negative inference, atDNA chromosome mapping, and a deep dive into documentary records achieves a defensible conclusion of misattributed parentage. PAGE: 45</p>
	<p>RECORDS ALL F102 Courting America: Using Court Records for Genealogy <i>Judy G. Russell, JD, CG, CGL</i> In this overview from jury lists to filed papers, learn how to use court records to document family relationships, life events, community happenings and more. PAGE: 29</p>	<p>TECHNOLOGY/AI ALL F202 Using Artificial Intelligence (AI) Tools for Land Records Analysis <i>David M. McCorkle</i> Use AI tools to quickly extract and organize information from multiple land records simultaneously, including metes and bounds, public land descriptions, geographic features, and neighbors. PAGE: 49</p>
	<p>LAND AND MAPS ADV F103 The Impact of Bounty Land on Migration <i>Craig R. Scott, CG, FUGA</i> Military bounty land grants employed in four historical periods will be examined: the colonial period, the Revolution, the War of 1812, and pre-1858 Indian wars. PAGE: 33</p>	<p>LAND AND MAPS INT-ADV F203 Territorial Papers of the US (1787–1912) – a Treasure Often Overlooked <i>Rick Sayre, CG, CGL, FUGA</i> Find information on individuals and families who lived in US territories. Kinship and migration patterns are often revealed in these records. PAGE: 53</p>
	<p>IRISH AMERICAN INT F104 Irish Immigration-Digging Deeper <i>David E. Rencher, AG, CG, FUGA, FIGSRS</i> Are your Irish ancestors not appearing in the usual sources? New strategies and sources to use when standard records have failed to identify their origins. PAGE: 37</p>	<p>GERMAN ALL F204 My Church Records Aren't Digitized: Now What? <i>Katherine Schober</i> While many German church records are available online, there are still countless others that have not yet been digitized. Learn how to access them here. PAGE: 57</p>
	<p>MY HERITAGE</p> <p>DNA INT-ADV F105 Using Advanced DNA Tools to Understand Your DNA Matches on MyHeritage <i>Daniel Horowitz</i> MyHeritage's revolutionary DNA technologies Theory of Family Relativity™, Chromosome Browser, AutoClusters, and cM Explainer™ reveal valuable information helping you understand your relationships to DNA matches. PAGE: 41</p>	<p>ANCESTRY</p> <p>TECHNOLOGY ALL F205 What's New at Ancestry® in 2024 <i>Crista Cowan</i> For forty years, Ancestry has demonstrated its commitment to innovation in service of our community. Learn more about what you can look forward to in 2024. PAGE: 61</p>
	<p>BREAK 1:30 p.m. ET 12:30 p.m. CT 11:30 a.m. MT 10:30 a.m. PT Conference sponsors and exhibitors will be streaming live demonstrations during the break. This is also a good time to schedule virtual meetups.</p>	<p>BREAK 3:30 p.m. ET 2:30 p.m. CT 1:30 p.m. MT 12:30 p.m. PT Conference sponsors and exhibitors will be streaming live demonstrations during the break. This is also a good time to schedule virtual meetups.</p>



SESSION SCHEDULE

ALL-All Levels | INT-Intermediate
INT-ADV-Intermediate-Advanced | ADV-Advanced

FRIDAY SCHEDULE—17 MAY 2024

#NGS2024GEN

<p>4:00 p.m. ET 3:00 p.m. CT 2:00 p.m. MT 1:00 p.m. PT</p> <p>BCG SKILLBUILDING INT-ADV F301 Formerly Known As: Proving Identity with Indirect Evidence <i>Stephanie O'Connell, CG</i> Prior to 1935, a person could simply use a name of their choice. In this case study, cluster research and analysis provided indirect evidence to prove identity. cluster research and analysis provided indirect evidence to prove identity. PAGE: 63</p>	<p>5:15 p.m. ET 4:15 p.m. CT 3:15 p.m. MT 2:15 p.m. PT</p> <p>BCG SKILLBUILDING ALL F401 Using Social and Historical Context to Support Indirect Evidence <i>LaBrenda Garrett-Nelson, JD, LLM, CG, CGL, FASG</i> Indirect evidence may be sufficient to support a genealogical conclusion, when informed by social, economic, and historical context. PAGE: 83</p>	<p>7:15 p.m. ET 6:15 p.m. CT 5:15 p.m. MT 4:15 p.m. PT</p> <p>BCG SKILLBUILDING ADV F501 Using Mitochondrial DNA (mtDNA) to Solve a Misattributed-Parentage Case in America's Colonial Era <i>Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS</i> A case study shows mtDNA solving an unknown parentage problem more than two centuries old. It also demonstrates the overturning of a seemingly proved conclusion. PAGE: 97</p>
<p>WOMEN ALL F302 In Their Own Words: Women and the War of 1812 <i>Julia A. Anderson, MA, AG</i> The War of 1812 changed American lives for generations. Explore its effects on women and families as revealed in War of 1812 pension files. PAGE: 67</p>	<p>METHODOLOGY INT F402 John C. McDaniel, Mexican War Soldier: Two Men in a Single Pension Record? <i>Rebecca Whitman Koford, CG, CGL</i> The case: a Mexican War soldier's pension record showed conflicts. Evidence mining, source evaluation, and reasonably exhaustive research explain how two separate men were confused. PAGE: 85</p>	<p>DNA ALL F502 It's Not What You Know, but Who You Know - Even in DNA <i>Dianhan Southard</i> You don't need to identify all your DNA matches. Learn to target the best ones on your list to address the question on your mind. PAGE: 101</p>
<p>WRITING ALL F303 Illuminating Ancestors' Lives in Small Bites through Focused Themes and Engaging Narratives <i>Diana Elder, AG</i> Learn how to craft compelling ancestor stories to share: Spotlight captivating aspects of their lives through themed sketches, organized timelines, citations, and engaging narratives. PAGE: 71</p>	<p>WOMEN ALL F403 Lunacy and Asylums: Exploring Mental Health Treatment in 19th Century for Women <i>Janice Lovelace, PhD</i> Did your female ancestors struggle with mental health issues? Were they committed to an asylum in the 1800s? What records can you access? PAGE: 89</p>	<p>METHODOLOGY ALL F503 Rapid Roots: Seven Share their Secrets in Seven Minutes <i>Jill Morelli, CG, CGL, Shamele Jordan, Angela Packer McGhie, CG, FUGA, Mahina Oshie, Robert Raymond, Lori Samuelson, MA, MEd, Karen Stanbary, MA, LCSW, CG, Evan Wilson</i> Using PechaKucha format, seven genealogists will share their best tips. This rapid-fire presentation maximizes the number of suggestions in a minimum amount of time. PAGE: 103</p>
<p>LGBTQ+ FAMILIES ALL F304 LGBTQ+ Family History <i>Stewart Blandón Trainan</i> Using genealogy skills within the context of LGBTQ+ history we will address hints for family members who may have been LGBTQ+. PAGE: 75</p>	<p>JEWISH ALL F404 It's What They Answered To: Understanding Ashkenazic Jewish Names <i>Emily H. Garber, MA</i> Determining Jewish ancestors' names is critical to following people back to the old country. Clues may come from a variety of records and contexts.the old country. Clues may come from a variety of records and contexts. PAGE: 91</p>	<p>NATIVE AMERICAN ALL F504 The Five Largest: Researching the Biggest Indigenous Tribes of the US <i>Judy Nimer Muhn</i> What should be researched first regardless of tribe, and then what records are unique to the five largest tribes: Cherokee, Chippewa, Choctaw, Navaho, and Sioux.tribes: Cherokee, Chippewa, Choctaw, Navaho, and Sioux PAGE: 107</p>
<p>APG ALL F305 Becoming a Professional Genealogist <i>John Boeren and others</i> Eight members of APG explain the variety of career options, relevant experience, educational plans, and business skills necessary to become a successful professional genealogist. PAGE: 79</p>	<p>TECHNOLOGY ALL F405 Don't let your memories fade! <i>Rick Voight</i> Simple, affordable, groundbreaking integrated solutions provide features and functions for consumer and community use. PAGE: 95</p>	<p>TECHNOLOGY/AI ALL F505 Virtual Family Reunions: Using Technology to Host and Plan Your Event and Conduct Interviews <i>David Allen Lambert</i> Learn about available technology to plan, host, and broadcast your family reunion. Using tech learn how to conduct interviews of family in person or remotely. PAGE: 111</p>
<p>BREAK 5:00 p.m. ET 4:00 p.m. CT 3:00 p.m. MT 2:00 p.m. PT It's five o'clock somewhere! Now is a good time to grab a snack and let the dog out.</p>	<p>BREAK 6:15 p.m. ET 5:15 p.m. CT 4:15 p.m. MT 3:15 p.m. PT Conference sponsors and exhibitors will be streaming live demonstrations during the break. This is also a good time to schedule virtual meetups.</p>	



SESSION SCHEDULE

ALL-All Levels | INT-Intermediate
INT-ADV-Intermediate-Advanced | ADV-Advanced

SATURDAY SCHEDULE—18 MAY 2024

#NGS2024GEN

11:00 a.m. ET 10:00 a.m. CT 9:00 a.m. MT 8:00 a.m. PT	12:30 p.m. ET 11:30 a.m. CT 10:30 a.m. MT 9:30 a.m. PT	2:30 p.m. ET 1:30 p.m. CT 12:30 p.m. MT 11:30 a.m. PT
<p>PLENARY SESSION Artificial Intelligence and Genealogy: A Discussion of Issues and Concerns <i>Blaine T. Bettinger, PhD, JD, and others</i> Generative artificial intelligence such as ChatGPT, Bard, and DALL-E show great potential as tools for genealogists. But what are the challenges and limitations of generative AI, and how will it affect both the researcher and genealogy companies? Join Blaine Bettinger and a group of experts in the nascent field of generative AI and genealogy as they discuss and debate some of the issues associated with this topic.</p>	<p>BCG SKILLBUILDING INT-ADV S101 Writing is Researching: How Narrative & Report Writing Improves Analysis <i>Rebecca Whitman Koford, CG, CGL</i> “Stop and think” in genealogy analysis is the practice of stopping to write. This workshop-style presentation exemplifies the power of writing while actively researching. PAGE: 113</p> <p>AFRICAN AMERICAN ALL S102 Sources for Researching Rural Ancestors <i>Ari Wilkins</i> “If you blink, you’ll miss it!” Did your ancestor come from a one-horse town or an unincorporated community? Learn about researching country ancestors! PAGE: 117</p>	<p>BCG SKILLBUILDING INT-ADV S201 “A Matrimonial Advertiser:” Tracing the Treacherous Trail of an early 20th-Century Romance Scammer <i>Sharon Hoyt, MLIS, CG</i> Reasonably exhaustive research and evidence correlation overcame falsified records, frequent moves, and multiple marriages to reveal a woman’s criminal past. PAGE: 131</p> <p>AFRICAN AMERICAN ALL S202 Researching African American Ancestors in Equity Court Files <i>LaBrenda Garrett-Nelson, JD, LL.M., CG, CGL, FASG</i> In the antebellum period equity courts had a specialized jurisdiction that lent itself to controversies involving enslaved people. PAGE: 135</p>
	<p>RECORDS ALL S103 Method to the Madness: Investigating Every Possible Newspaper for Your Ancestors <i>James M. Beidler</i> It’s tempting to go straight to historical newspaper databases when starting a search. But savvy researchers march to the beat of a different flowchart. PAGE: 121</p> <p>MEXICAN AMERICAN INT-ADV S104 Civil Registrations: Digging Deeper into the Lives of Your Mexican Ancestors <i>Colleen Robledo Greene, MLIS</i> Understanding relevant federal and state laws, cultural conventions, and terminology will help you conduct deeper analysis using Mexico’s federal vital record system. PAGE: 125</p>	<p>TECHNOLOGY/AI ALL S203 Hand-written Text Recognition: Harnessing the Power of Artificial Intelligence to Transcribe and Search Documents <i>Yvette Hoitink, CG, QG</i> Hand-written text recognition software can turn manuscripts into searchable transcriptions. Learn how to use these tools and what they can (and cannot) do for you. PAGE: 139</p> <p>ASIAN AMERICAN ALL S204 How Established and More Recently Arrived Asian American Researchers Can Learn from Each Other <i>Grant Din, MA</i> Most documents for Asian immigrants are pre-1965. Most Asian Americans today are from families that immigrated after 1965. Learn how they can help each other. PAGE: 143</p>
	<p>DNA ALL S105 Assembling Cryptic Bits of Documentary Evidence and DNA to Answer Major Genealogical Questions <i>Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS</i> A case with audience participation demonstrates using at-home research to follow trails of clues from one country to another and assembling the clues into conclusions. PAGE: 129</p>	<p>TECHNOLOGY ALL S205 Level Up Your Family Tree with Ancestry® ProTools <i>Anne Gillespie Mitchell</i> Want to improve accuracy in your family tree? Learn more about how to level up your family history experience with a suite of new tools and features on Ancestry. PAGE: 147</p>
	<p>BREAK 1:30 p.m. ET 12:30 p.m. CT 11:30 a.m. MT 10:30 a.m. PT Conference sponsors and exhibitors will be streaming live demonstrations during the break. This is also a good time to schedule virtual meetups.</p>	<p>BREAK 3:30 p.m. ET 2:30 p.m. CT 1:30 p.m. MT 12:30 p.m. PT Conference sponsors and exhibitors will be streaming live demonstrations during the break. This is also a good time to schedule virtual meetups.</p>



SESSION SCHEDULE

ALL-All Levels | INT-Intermediate
INT-ADV-Intermediate-Advanced | ADV-Advanced

SATURDAY SCHEDULE—18 MAY 2024

#NGS2024GEN

<p>4:00 p.m. ET 3:00 p.m. CT 2:00 p.m. MT 1:00 p.m. PT</p>	<p>5:15 p.m. ET 4:15 p.m. CT 3:15 p.m. MT 2:15 p.m. PT</p>	<p>7:15 p.m. ET 6:15 p.m. CT 5:15 p.m. MT 4:15 p.m. PT</p>
<p>BCG SKILLBUILDING INT-ADV S301 Using Cluster Research to Prove Kinship <i>Dana Palmer, CG, CGL</i> Kinship can be proven in a variety of ways. Learn how cluster research and a Civil War pension file overcame this Ohio family's lack of records. PAGE: 149</p>	<p>BCG SKILLBUILDING ADV S401 Finding Frances: A German-American Case Study in Community, Illegitimacy, Immigration, and Interstate Migration <i>Nancy A. Peters, CG, CGL</i> The decades-old mystery surrounding a nineteenth-century immigrant's Bavarian origin is solved through understanding community context and casting a wide net for clues beyond immediate family. PAGE: 169</p>	<p>BCG SKILLBUILDING INT-ADV S501 Submitting a Successful Certification Portfolio <i>David Ouimette, CG, CGL</i> This presentation demystifies the certification process by showing how judges evaluate portfolios. Learn how to use rubrics to evaluate your work and avoid common pitfalls. PAGE: 185</p>
<p>JAMES DENT WALKER MEMORIAL SERIES LECTURE AFRICAN AMERICAN ALL S302 From Heroes to Fathers: Unveiling the Stories of Black Military Soldiers and the Generations They Fathered <i>Dr. Shelley Viola Murphy</i> Exploring African American contributions from the Revolutionary War to WWII, this presentation uncovers the intimate narratives of German and Japanese "Brown Babies." PAGE: 153</p>	<p>JAMES DENT WALKER MEMORIAL SERIES LECTURE CANCELLED AFRICAN AMERICAN ALL S402 "Freedom in my Bones": The Genealogy of Black Civil War Soldiers and Sailors <i>Leslie Anderson, MSL</i> Reconstruct a community by applying best practices to an exploration of the lives of Black Civil War soldiers and sailors.</p>	<p>TECHNOLOGY ALL S502 Organizing FAN Club Research with Airtable: Who was John West? <i>Nicole Elder Dyer</i> Airtable is valuable for organizing complicated research. To identify John West, information about his friends, potential family, associates, and neighbors was gathered and analyzed. PAGE: 189</p>
<p>RECORDS ALL S303 In That Case: Using the Caselaw Access Project <i>Judy G. Russell, JD, CG, CGL</i> Published court opinions help trace families, document events, and tell stories. Learn how to use a free entry portal—Case.law—to find your ancestor. PAGE: 157</p>	<p>RECORDS ALL S403 Complete Census Research: Evaluating the Whole Schedule <i>C. Ann Staley, CG, CGL</i> Focuses on available state and federal population schedules which names everyone living in the household and shows the benefits of analyzing the neighbors. PAGE: 173</p>	<p>LAND AND MAPS INT-ADV S503 Using Land Records to Prove Ancestral Connections <i>Barbara Vines Little, CG, FNGS, FUGA, FVGS</i> Learn to use tract and other land ownership maps, land platting, and/or title searching to identify an earlier landowner and prove that ancestral connection. PAGE: 193</p>
<p>METHODOLOGY ALL S304 Research Planning: The First Step to Solving Tough Problems <i>Jill Morelli, CG, CGL</i> Thoughtful planning initiates all new ancestral research and continues throughout the process. Perhaps thinking about research planning differently will help solve your genealogical problem. PAGE: 161</p>	<p>DNA ALL S404 DNA's FAN Club: Using Shared Matches to Solve Genealogical Mysteries <i>Paula Williams</i> Friends, Associates, and Neighbors help with our paper trail research, and shared DNA matching is just as critical. We'll explore this powerful DNA tool. PAGE: 177</p>	<p>RECORDS ALL S504 Discovering Buried Treasure: Miscellaneous Papers and Mixed Provenance Records <i>Cheri Hudson Passey</i> Repositories have unsorted and uncategorized records that often contain information answering genealogy questions. Learn to dig for buried treasure in "Miscellaneous" and "Unknown Provenance" files. PAGE: 197</p>
<p>FAMILY TREE DNA DNA ALL S305 Discover Your Paternal Heritage and Expand Your Family Tree with Y-DNA <i>Katy Rowe-Schurwanz</i> Reach back further with Y-DNA! Learn how to use Y-DNA results to discover more about your father's heritage and break brick walls. PAGE: 165</p>	<p>FAMILYSEARCH TECHNOLOGY/AI ALL S405 AI Innovations at FamilySearch <i>Robert Raymond</i> From image innovations in 2020 to record innovations in 2022 and every word indexes in 2024, FamilySearch is radically transforming the rapid publication of online records. PAGE: 181</p>	<p>FAMILY TREE MAKER TECHNOLOGY ALL S505 What's New With Family Tree Maker <i>Duff Wilson</i> Learn about the most recent additions to Family Tree Maker and see some of the exciting new collaboration and multimedia capabilities that are coming. PAGE: 199</p>
<p>BREAK 5:00 p.m. ET 4:00 p.m. CT 3:00 p.m. MT 2:00 p.m. PT It's five o'clock somewhere! Now is a good time to grab a snack and let the dog out.</p>	<p>BREAK 6:15 p.m. ET 5:15 p.m. CT 4:15 p.m. MT 3:15 p.m. PT Conference sponsors and exhibitors will be streaming live demonstrations during the break. This is also a good time to schedule virtual meetups.</p>	



Continuing Genealogical Studies (CGS) Special Subjects Require Special Skills



Transcribing, Extracting, and Abstracting Genealogical Documents

This course provides detailed instructions on how to transcribe, extract, and abstract documents along with when to use each process in your genealogical work. The goal is to teach you the skills needed so that you will be able to apply the knowledge accurately from any kind of document with confidence and success to further your genealogical research.



Reading Old Handwriting

Reading old handwriting is an essential skill for genealogists but sometimes it can be challenging. Genealogists study and practice reading old handwriting in order to read and interpret the documents essential to family history research such as probate files, wills, land records, deeds, and court files. Many documents require the genealogist to read old handwriting to transcribe, abstract, or extract the pertinent data and use it in their family history.



Understanding and Using DNA Test Results

Helps you understand and apply your test results in combination with traditional genealogical research to build your family tree. It covers basic types of DNA tests, including autosomal DNA, mitochondrial DNA, and Y-DNA; differences between companies that offer genetic testing; and useful third-party tools. To get the most out of the course, students should have taken an autosomal DNA test.



Genetic Genealogy, Autosomal DNA

This intermediate course focuses on using autosomal DNA to find unknown ancestors. The process uses detailed analysis and triangulation of genetic cousins' shared segments to identify common ancestors. It addresses population databases and admixture percentages as well as the use of well-researched family trees in DNA analysis.



African American Roots: A Historical Perspective

Covers records that pertain to slavery, censuses, vital records, the Freedmen's Bureau, military, and civil service records. The course begins with an overview of how to conduct genealogical research and the Genealogical Proof Standard. It examines the role of Africans, their descendants in the colonies, the growth of slavery, emancipation, and subsequent events.



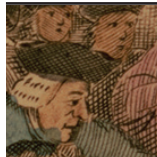
Federal Land Records

Learn about the different types of land entries including cash entries, donation land, homesteads, and military bounty land. Covers which types of documents to expect in the land entry files, how to find out if an individual applied for federal land, and how to locate and order copies of the records.



War of 1812 Records

Explains the various records associated with the War of 1812 and their genealogical significance. Students will increase their knowledge of numerous records including Acts of Congress, pension records, Compiled Military Service Records, bounty land records, Army, Naval, and Marine Corps records, muster rolls, ships' logs, diplomatic records, and state militia records.



Researching Your Revolutionary War Ancestors

Covers US records created during and after the war and Revolutionary War repositories such as the Library of Congress, US Army Heritage and Education Center, and National Archives. Includes military units organized; how soldiers were ranked; battle locations; bounty land awards; pension and payment records; the Compiled Military Service Record; fraternal and lineage society organizations.



Introduction to Civil War Research

Teaches how to trace ancestors, locate and understand the Compiled Military Service Record, research Union and Confederate military and prison records. Includes Civil War repositories: Library of Congress, the US Army Heritage and Education Center, and National Archives. Learn about rank; battles; pension index and application files; death and burial records.



Researching Your World War I Ancestors

Introduces records for the Army, Navy, and Marine Corps, to trace a soldier's unit during the war. Teaches about serial numbers, units, personnel records; who served in US Army divisions, American Expeditionary Forces, US Navy, and Red Cross. How to request Official Military Personnel Files; locate and obtain records of death and burial in US military cemeteries.

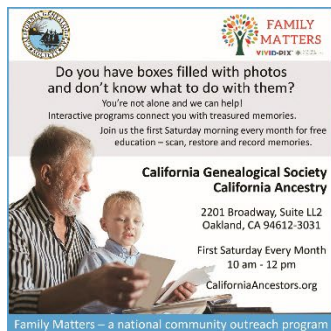
Learn more at ngsgenealogy.org | 800-473-0060

NGS Education. Build Your Skills. Build Your Family History.



FAMILY MATTERS

Family Matters, created by the National Genealogical Society (NGS) and Vivid-Pix, provides genealogy and family history organizations with resources to connect with the public, share their expertise, and engage members/patrons. The **Family Matters Community Engagement Program and Outreach Toolkit** includes the Vivid-Pix Memory Station™ hardware and software, education courses, and marketing templates.



Do you have boxes filled with photos and don't know what to do with them? You're not alone and we can help! Interactive programs connect you with treasured memories. Join us the first Saturday morning every month for free education – scan, restore and record memories.

**California Genealogical Society
California Ancestry**

2201 Broadway, Suite LL2
Oakland, CA 94612-3031

First Saturday Every Month
10 am - 12 pm
CaliforniaAncestors.org

Family Matters – a national community outreach program



Does a loved one remember 50 years ago better than 50 seconds ago – you're not alone. Don't Let Your Memories Fade. Online programs connect you with treasured memories.

Association of Retirement Organizations in Higher Education

Webinar: Tuesday, April 18, 2023

10:00 - 11:15 a.m. Pacific
11:00 - 12:15 a.m. Mountain
12:00 - 1:15 p.m. Central
1:00 - 2:15 p.m. Eastern

Register at:
arohe.org/event-4995391

Family Matters – a national community outreach program

Family Matters supports organizations in meeting goals for:

- **Mission Fulfillment** – Help people research and preserve their family history and share the joy of genealogy discoveries
- **Member/Patron Engagement** – Generate excitement with the people you currently serve, and grow as you inspire interest with a new audience
- **Volunteer Development** – Enrich and encourage volunteerism by providing a meaningful and fun opportunity to assist with an event

NGS organization members can request a Toolkit loan to have a Vivid-Pix Memory Station™ shipped directly to the organization (only paying for shipping back to NGS or to the next group receiving a loan). Vivid-Pix will supply software and training materials via download for free. Scan the QR code, or go to <https://bit.ly/familymatterstoolkitrequest>, to submit a request.



Need to know more? Email NGS Organizations and Communities Manager Kate Smith at ksmith@nsgenealogy.org or visit vivid-pix.com/familymatters. See the benefits of Family Matters and the Memory Station™ at <https://youtu.be/RolG66VDK4s>.



CONFERENCE SPEAKER BIOGRAPHIES

Julia A. Anderson, MA, AG, AGL, is a United States and Canada research specialist at the FamilySearch Library, faculty member at Salt Lake Community College, and owner of Anderson Genealogical Research, LLC. | [F302](#)

James M. Beidler has authored four books, including three on German genealogy. He also writes “Roots & Branches” weekly and is a *German Life* magazine columnist. | [S103](#)

Blaine T. Bettinger, PhD, JD, is a professional genealogist specializing in DNA evidence. He is the author of *The Genetic Genealogist* and the Shared cM Project. | [Saturday Plenary](#)

John Boeren, LLM, PGCert, offers research in the Netherlands and Dutch records. He runs his own genealogy business and works primarily for international clients. | [F305](#)

Marie E. Byatt began genealogical research in 1985. She volunteered at a Family History Center for eleven years and has been a trustee of the Guild of One-Name Studies since 2017. | [FOCUS203](#)

Caitlin Oiyee Coon, MA, MLIS, has over fifteen years of experience as an archivist. At Densho, whose mission is to preserve and share history of the WWII incarceration of Japanese Americans, she manages the archives program and oversees the preservation of historical materials and oral histories. | [FOCUS303](#)

Crista Cowan, known online as “The Barefoot Genealogist,” has been employed by Ancestry.com since 2004. Crista has spent thousands of hours discovering, documenting, and telling family stories. | [F205](#)

A. Lynne Deese has been conducting genealogical research for eleven years. She is an active member of the Wake County Genealogy Society where she works on digitization projects. | [FOCUS202](#)

Grant Din, MA, specializes in Asian American genealogy. He has a certificate in genealogical research from Boston University and his writing has appeared in the *NGS Quarterly*. | [F305](#), [S204](#)

Nicole Elder Dyer is a professional genealogist with a BA in History. She is the author of *Research Like a Pro with DNA*, a study group instructor, lecturer, a podcast host, and creator of Family Locket. | [S502](#)

Diana Elder, AG, AGL, is a professional genealogist, ICAPGen Commissioner, author of *Research Like a Pro: A Genealogist's Guide*, podcast host, and online course instructor. | [F303](#)

Marcia Fraser, MALS, has been the special collections librarian for Williamson County Public Library for eight years. She has a love for local history, preservation, and genealogy. | [FOCUS301](#)

Emily H Garber, MA, has a certificate in genealogical research from BU, and is a professional family historian who specializes in Jewish genealogy, methodology, and community research. She serves on the IAJGS board. | [F404](#)

LaBrenda Garrett-Nelson, JD, LLM, CG, CGL, FASG is a trustee of BCG who lectures and writes about both methodology and African American genealogy. | [F401](#), [S202](#)

Shannon Green, CG, is a genealogy researcher, writer, and educator. She is a BCG trustee and former instructor for Boston University's Genealogy Principles course. | [T301](#)

Colleen Robledo Greene, MLIS, is an academic librarian and college educator. She is a nationally recognized speaker specializing in methodology, Hispanic research, libraries, and technology. | [S104](#)

Jenny Hansen, AG, AGL, graduated from Brigham Young University with a degree in Family History and Genealogy. She currently performs client research and enjoys teaching genealogy. | [T201](#)

Yvette Hoytink, CG, QG, is a professional genealogist, writer, and lecturer from the Netherlands. She won awards for her articles in the *APG Quarterly* and *NGS Quarterly*. | [F101](#), [S203](#)

Daniel Horowitz has been dedicated to genealogy since 1986, and has worked at *MyHeritage* since 2006, lecturing at conferences around the world. He is involved in digitization and transcription projects. | [F105](#)

#NGS2024GEN



CONFERENCE SPEAKER BIOGRAPHIES

Sharon Hoyt, MLIS, CG, is a researcher, lecturer, writer, and a winner of the NGS and Minnesota State Genealogical Society Family History Writing Contests. | **S201**

Jenny Rizzo Irwin, CG, specializes in traditional client work with a geographic focus on the Mid-Atlantic and New England states. She also conducts kinship research for the US military. | **F305**

Marcia Johnson, MBA, MPA, serves as administrator for the National Grigsby Family Society and its charitable wing, the National Grigsby Preservation Foundation. She previously was a hospital administrator and university adjunct faculty member. | **FOCUS103**

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS, is an award-winning genealogical author and researcher, and a popular speaker at conferences, institutes, and seminars. He wrote *Mastering Genealogical Proof* and *Mastering Genealogical Documentation*. | **F501, S105**

Shamele Jordan is the award-winning TV producer of *Genealogy Quick Start*, a researcher for the PBS series *African American Lives*, and a New Jersey Historical Commission grant recipient. | **FOCUS102, F503**

Rebecca Whitman Koford, CG, CGL, is the executive director of BCG and director of the Genealogical Institute on Federal Records. Her research concentrates on Maryland, upstate New York, Virginia, District of Columbia, and early military. | **F402, S101**

David Allen Lambert has been the chief genealogist of *American Ancestors* by New England Historic Genealogical Society since 1993 and is the co-host of *Extreme Genes* radio and podcast show. | **F505**

Barbara Vines Little, CG, FNGS, FUGA, FVGS, is a former president of NGS, and is the editor of the quarterly *Magazine of Virginia Genealogy*, and the NGS Research in the States series. | **S503**

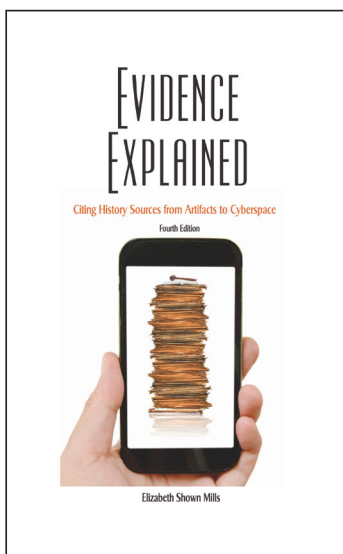
Steve Little, driven by a deep love for language and technology, has been a trailblazer in documenting and advancing the field of AI-assisted genealogy from its onset. **Friday Plenary**

#NGS2024GEN

It's here! The Fourth Edition . . .

EVIDENCE EXPLAINED

Citing History Sources from Artifacts to Cyberspace
A *Library Journal* "Best Reference"



What's new?

- 14 universal templates for citing every kind of source
- 1000+ citation examples, each keyed to a specific template
- New tutorial: "Building Your Citation"
- Expanded emphasis on digitized primary sources
- Expanded international coverage
- Updated discussions and examples for every type of source and all digital delivery mechanisms

Evidence Explained has been the go-to guide for history researchers since 2007 because it guides us through a maze of historical resources not covered by other citation manuals—all kinds of primary-source materials, accessed through all kinds of media. More than a thousand examples for U.S. and international documents demonstrate how to handle the quirks that stump users of these materials. And it's written by **Elizabeth Shown Mills**, arguably the most influential genealogist in the U.S. Ms. Mills edited the *National Genealogical Society Quarterly* for 16 years, and for 25 years headed a university-based program in advanced research methodology. Ms. Mills knows records, loves records, and regularly shares her expertise in them with live and media audiences around the world.

739 pp., indexed, hardcover, 2024. ISBN 9780806321318. **\$65.00**

Order from <https://genealogical.com>

Genealogical Publishing Company • 3600 Clipper Mill Rd. Suite 229 • Baltimore, MD 21211 www.genealogical.com



CONFERENCE SPEAKER BIOGRAPHIES

Janice Lovelace, PhD, is a genealogical researcher, lecturer, and author of the NGS online continuing education course *African American Roots: A Historical Perspective*. | [F403](#)

J. Mark Lowe, FUGA, is a professional genealogist, lecturer and author who specializes in the American South. He is a course coordinator for IGHR and TIGR. | [F305](#)

Annette Burke Lyttle, president of APG, speaks at the national, state, and local levels, and loves helping people uncover and share their family stories. | [F305](#)

Tonya M. Matthews, PhD, is president and CEO of the International African American Museum (IAAM) located in Charleston, SC, at the historically sacred site of Gadsden's Wharf, one of our nation's most prolific former slave ports. | [FOCUS Plenary](#)

Linda Caldwell McCleary, MLS, was the Arizona State Library genealogy collection manager, and is Arizona Genealogical Advisory Board vice president. She encourages partnerships between libraries and societies. | [FOCUS201](#)

David M. McCorkle specializes in land records, platting, mapping tools, digitization, and software. He is president of *NC Historical Records Online* and created the website *NC Land Grants*. | [F202](#)

Angela Packer McGhie, CG, FUGA, is passionate about genealogy education and serves as a trustee for the Board for Certification of Genealogists. | [F503](#)

Anne Gillespie Mitchell, Principal Product Manager, has worked on a variety of products at Ancestry®, has been a faculty member at SLIG and TIGR, and has lectured for more than a decade. | [S205](#)

Jill Morelli, CG, CGL, is a lecturer specializing in methodology and Scandinavia. She is a founder of the Certification Discussion Group and Applied Genealogy Institute. | [F503](#), [S304](#)

Judy Nimer Muhn is a professional genealogist, researcher, presenter, writer, and owner of Lineage Journeys. She is a traveler, blogger, and society leader. | [F504](#)

Shelley Viola Murphy, DM, known as *familytreegirl*, has been a genealogist for thirty years. She holds memberships with AAHGS, APG, NGS, and various genealogy groups. She also sits on various boards and is president of MAAGI. | [S302](#)

Heather O'Hara has been researching her family's history for over twenty years and is president of the Maryland Genealogical Society. She is a member of DAR and many other societies. | [FOCUS302](#)

Stephanie O'Connell, CG, is a professional genealogist who is passionate about incorporating social and women's history into family narratives. She has expertise in English, Scottish, and Irish records. | [F301](#)

Mahina Oshie, MLIS, is a special collections librarian at the Seattle Public Library. She is a staff genealogy librarian who has helped many people research their family trees. | [F503](#)

David Ouimette, CG, CGL, is a BCG trustee and author. He manages Asia-Pacific record priorities, including oral genealogy, at *FamilySearch*, specializes in tracing immigrants, and has researched in over seventy countries. | [S501](#)

Dana Palmer, CG, CGL, specializes in lineage society applications, publishing family books, Midwestern research—specifically Ohio—and is part of the General Society of Mayflower Descendants Silver Books team. | [S301](#)

Cheri Hudson Passey is a professional genealogist and international speaker. She writes the "Carolina Girl Genealogy" blog where she shares tips, methodologies, and family stories. She currently serves as NGS VP of Society & Organization Management. | [S504](#)

Amanda E. Perrine, MSLIS, is a genealogist and librarian in Syracuse, New York. Her focus is researching in New York State west of the Hudson Valley. | [F305](#)

Nancy A. Peters, CG, CGL, is an author, institute instructor, lecturer, and researcher specializing in problem-solving methodologies. She co-edited NGSQ from 2019 to 2022 and is a former BCG trustee and officer. | [S401](#)



CONFERENCE SPEAKER BIOGRAPHIES

Darcie Hind Posz, CG, FASG, has worked professionally as a genealogist and researcher for libraries, private hereditary societies, the federal government, and the Genealogical Institute on Federal Records (GenFed). | [T301](#)

Robert Raymond is a genealogical technologist, a *FamilySearch* deputy chief genealogical officer, and a former director of the National Genealogical Society. | [F503](#), [S405](#)

David E. Rencher, AG, CG, FUGA, FIGRS, is the chief genealogical officer at *FamilySearch*. He is past president of FGS, and an Irish research specialist. He is a director on the NGS board. | [F104](#)

Charity C. Rouse, MLS, is the director of Local History for the Spartanburg County Public Libraries and supervises genealogy, local history, and archival reference services. | [FOCUS101](#)

Katy Rowe-Schurwanz is a product owner for *FamilyTreeDNA* where she has focused closely on improving FTDNA's genetic genealogy products. Her love of genealogy was inspired by her maternal grandparents. | [S305](#)

Judy G. Russell, JD, CG, CGL, *The Legal Genealogist*, provides expert guidance through the murky territory where law, history, and genealogy come together. | [F102](#), [S303](#)

Lori Samuelson, MA, MEd, is an author, educator, lecturer, and researcher. She blogs weekly at *GenealogyAtHeart.com* focusing on sensitive subjects and heart-warming genealogical finds. | [F503](#)

Rick Sayre, CG, CGL, FUGA, is a BCG trustee. His expertise includes the National Archives, Irish research, land records, government documents, federal land, military records, and urban research. | [F203](#)

Katherine Schober of *Germanology Unlocked* is a German-English genealogy speaker, author, and translator, specializing in the old German handwriting. | [F204](#)

Craig R. Scott, CG, FUGA, is president and CEO of Heritage Books, Inc., and the coordinator of the SLIG Guidance and Consultation course. He specializes in problem-solving, military, Quakers, and the National Archives. | [F103](#)

Jen Shaffer is the owner of *The Formidable Genealogist* focusing on American, Slavic, and Nordic research. She has a BA in Russian Language and Russian Studies. | [F305](#)

Diahan Southard is the founder of *Your DNA Guide*. She makes DNA accessible, exciting, and relevant. You will leave her lectures motivated to take DNA action. | [F502](#)

C. Ann Staley, CG, CGL, is an educator, consultant, NIGS faculty member, and GSG membership chair. She is the author of articles for *NGS Magazine*, and co-author of *NGS's Research in Florida*. | [S403](#)

Karen Stanbary, MA, LCSW, CG, lectures nationally on using DNA in genealogical problem-solving. She is a BCG trustee and chairs their DNA Committee. | [F201](#), [F503](#)

Lisa Stokes, AG, specializes in US Mid-South research. She has experience in the forensic genealogy field, teaches a citation course, and serves as ICAPGen commissioner over Study Groups. | [T201](#)

Stewart Blandón Traiman is a professional genealogist, graduate of ProGen 49, public speaker, and blogger. He has been a volunteer with the California Genealogical Society since 2014. For more see *SixGen.org*. | [F304](#)

Korina Tueller, MLIS, is the administrator for the State of Arizona Research Library. She enthusiastically connects researchers to resources any chance she gets. | [FOCUS201](#)

Pam Vestal specializes in genealogical research and ancestral biographies, in addition to transcribing old documents. Her work has been published in the *NGS Magazine*. | [T101](#)

Rick Voight, CEO and co-founder of Vivid-Pix, and publisher of *Reunions* magazine, is a lifelong photography and imaging visionary with leading photography companies, such as Hewlett-Packard and Kodak. | [F405](#)

Ari Wilkins is a coordinator of a TIGR course and a lecturer at SLIG, GRIP, and IGHR. She specializes in African American research. | [S102](#)

Paula Williams specializes in using and teaching DNA, and southern US research. She's a board member for the Virginia Genealogical Society and GRIVA. | [S404](#)



Duff Wilson, Executive Director, Family Tree Maker, has three decades of software design and development experience and has been involved in the design of every edition of Family Tree Maker since 2004. | **S505**

Evan Wilson is a professional genealogist specializing in southern research and genetic genealogy. He unites a deep understanding of historical context with meticulous attention to detail and a passion for writing. | **F503**

Paul Woodbury, AG, MEd, is a research team manager at Legacy Tree Genealogists. He has a BS in Genetics, with a Family History minor, and an MEd in Instructional Design. | **F305**

#NGS2024GEN

NGS Certificate Course

ADVANCED SKILLS IN GENEALOGY

NATIONAL GENEALOGICAL SOCIETY
FOUNDED 1903

- Master Records & Resources
- Prepare for Professional Work
- Learn Methodology
- Earn a Certificate



Advanced Skills in Genealogy



A Certificate Course from the National Genealogical Society

Mastery of family history research skills is the basis for building an accurate genealogy. The National Genealogy Society (NGS) has designed a course specifically for this purpose called Advanced Skills in Genealogy to support intermediate to advanced genealogists.

This institute-level, standards-based course written by genealogy education experts helps students master genealogical records and methodology. Students who complete the course will earn a certificate in Advanced Skills in Genealogy.

Students receive guidance in sixteen significant types of genealogical records, analysis and correlation of information, and methodologies and strategies to meet genealogical challenges. The course teaches advanced skills through the use of extensive course materials, case studies,

NGS Quarterly and *NGS Magazine* articles, video presentations, live Zoom sessions, and hands-on activities. Practical assignments provide an opportunity to reinforce concepts and build skills for future research. Mentors grade key assignments and provide personalized feedback.

The Advanced Skills course will empower you to discover more records and recognize if they are the *correct records* for the family you are researching.

For decades, genealogists from beginner to advanced have practiced and developed their skills with NGS's home study courses. NGS continues to provide the best online genealogical courses to help you succeed in building and preserving your family history.

nsgenealogy.org | Special rates for NGS Members



NATIONAL
GENEALOGICAL
SOCIETY

NGS Education. Build Your Skills. Build Your Family History.



ABBREVIATIONS

#NGS2024GEN

AAHGS	Afro-American Historical and Genealogical Society
AG	Accredited Genealogist
APG	Association of Professional Genealogists
atDNA	Autosomal DNA
BA	Bachelor of Arts
BCG	Board for Certification of Genealogists
BCG Ed Fund	BCG Education Fund
BYU	Brigham Young University
CG	Certified Genealogist
CGL	Certified Genealogical Lecturer
cM	Centimorgans
DBA	Doctor of Business Administration
DM	Doctor of Management
DNA	Deoxyribonucleic acid
FASG	Fellow, American Society of Genealogists
FGS	Federation of Genealogical Societies
FIGRS	Fellow, Irish Genealogical Research Society
FNGS	Fellow, National Genealogical Society
FUGA	Fellow, Utah Genealogical Association
FVGS	Fellow, Virginia Genealogical Society
Gen-Fed	Genealogical Institute on Federal Records
GRIP	Genealogical Research Institute of Pittsburgh
GRIVA	Genealogical Research Institute of Virginia
ICAPGen	International Commission for the Accreditation of Professional Genealogists
IGHR	Institute of Genealogy and Historical Research, University of Georgia
JD	Juris Doctor
KDP	Kinship Determination Project
LGBTQIA+	Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, and Asexual

LLC	Limited Liability Company
LLM	Master of Laws
MDiv	Master of Divinity
MLIS	Master of Library and Information Science
MLS	Master of Library Science
MSLIS	Master of Library and Information Science
MSLS	Master of Science in Library Science
NARA	National Archives and Records Administration
NEHGS	New England Historic Genealogical Society
NGS	National Genealogical Society
NGSQ	National Genealogical Society Quarterly
NHPRC	National Historical Publications and Records Commission
NIGS	National Institute of Genealogical Studies
NSDAR	National Society Daughters of the American Revolution
NIGS	National Institute of Genealogical Studies
NYG&B	New York Genealogical and Biographical Society
PhD	Doctor of Philosophy
SLAM	Societies, Libraries, Archives, and Museums
SLIG	Salt Lake Institute of Genealogy
VP	Vice President

CG and Certified Genealogist are registered service marks of the Board for Certification of Genealogists®. CGL, Certified Genealogical Lecturer, CGG, and Certified Genetic Genealogist are common law service marks of the Board for Certification of Genealogists.


Accredited Genealogist® and AG®, registered marks, and the ICAPGenSM service mark are the sole property of the International Commission for the Accreditation of Professional Genealogists. Individuals licensed to use the mark have met ICAPGen's competency standards.

10 Important Things to Know about NGS



1 **FREE ACCESS TO**  NewspaperArchive
ngs.genealogy.org/newspaperarchive

2 **OVER 65 WITH A MEDICARE ADVANTAGE OR PLUS PLAN? YOUR DUES MAY BE FREE WITH**  Grouper
ngs.genealogy.org/grouper-covers-your-dues

3 **GRIP GENEALOGY INSTITUTE COMING UP**
• JUNE 23-28 VIRTUAL
• JULY 14-19 PITTSBURGH 
grip.ngsgenealogy.org

4 **CONFERENCE KEEPER.ORG IS THE MOST COMPLETE – ENTIRELY FREE – ONLINE CALENDAR OF GENEALOGY CONFERENCES & EVENTS**
conferencekeeper.org

5 **OUR ADVANCED SKILLS IN GENEALOGY COURSE IS THE BIGGEST PREDICTOR OF A SUCCESSFUL CERTIFICATION PROCESS**
 Education ngsgenealogy.org/advskills

6 **FOUNDATIONS IN FAMILY HISTORY IS THE MOST COMPREHENSIVE COURSE FOR BEGINNER AND INTERMEDIATE LEARNERS**
 Education ngsgenealogy.org/foundations

7 **CHECK OUT THE LATEST NEWS AND EVENTS ON UPFRONT WITH NGS**
upfront.ngsgenealogy.org

8 **MEMBER ZOOM EVENTS**
• MEMBERCONNECTS!
• CULTURE CONVERSATIONS
• YOUR NGS
recordings on  youtube.com/NgsgenealogyOrg

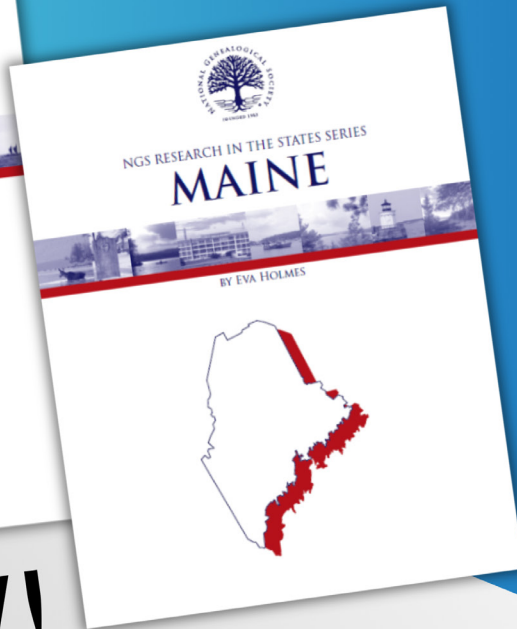
9 **500 MEMBER ORGANIZATIONS**
• DELEGATE COUNCIL
• FOCUS ON GENEALOGY ORGS
• SLAM! IDEA SHOWCASE
ngsgenealogy.org/society-organization-resources

10 **CONNECT WITH OTHER NGS MEMBERS ON FORUM**
nationalgenealogicalsociety.connectedcommunity.org

NGS Membership also includes the acclaimed NGS Magazine and National Genealogical Society Quarterly plus access to their indexes and digital archives.

Join NGS today
ngsgenealogy.org

Knowing Where to Look is Half the Battle



NEW!

Information on research sources in 33 states and for American Indians of Oklahoma.

Order starting 17 May 2024



NATIONAL GENEALOGICAL SOCIETY®



NATIONAL GENEALOGICAL SOCIETY®

Culture *Conversation*

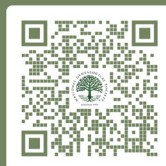
with Megan Smolenyak

The White House,

Ellis Island Immigrants, & Hollywood

22 May 2024
8:00 p.m. ET
Zoom

Register at
bit.ly/NGSCultureConvo22May2024



SCAN ME



ARTIFICIAL INTELLIGENCE

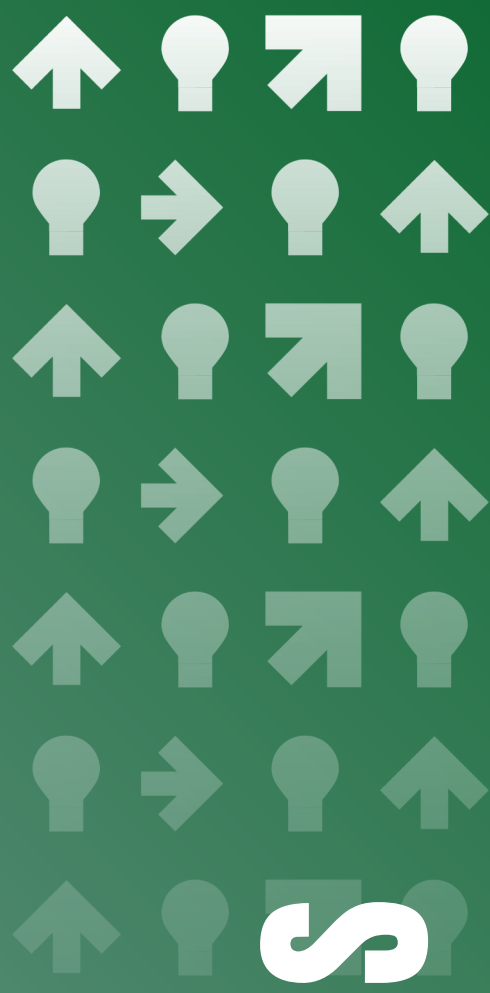


AI Toolbox: Monthly Workshops from NGS

Learn AI Skills – No AI Experience Needed

2024 Summer and Fall Workshops will be announced soon at

ngsgenealogy.org/genealogy-courses/



SPEAKER MATERIALS



NGS Online Course Transcribing, Extracting, and Abstracting Genealogical Documents

The best way to build your family tree accurately and successfully is through the careful examination and analysis of your documents. This can be accomplished by fully transcribing a document, extracting selected portions, or abstracting the important information.

This ten-module course guides students through the skills of transcribing, extracting, and abstracting. There are multiple examples, videos, and guidelines for working with deeds and wills as well as other types of documents. The videos demonstrate use of transcription software with practice documents provided.

Author Julie Miller recommends this as a great refresher course for the experienced genealogist and as a comprehensive tutorial course for those working to acquire these skills. Over thirty practice exercises will give students confidence working with a wide variety of documents.

About the Author

Julie Miller, CG, CGL, FNGS, is a full-time professional researcher, speaker, and writer who lives in Colorado.

Learn more at ngsgenealogy.org | 800-473-0060
Special rates for NGS Members

NGS Education. Build Your Skills. Build Your Family History.



F101

Yvette Hoitink, CG, QG

Four Farms, Four Names: From Research Report to Award-Winning NGSQ Article



#NGS2024GEN

Introduction

A good case study shares the solution of a genealogical problem so that others can learn from it. It showcases methods or unusual sources that others could use for similar problems, even if readers do not descend from that family. The key to a great case study is to treat the solved research problem as an example of how you can use the method or source successfully.

Writing a case study can be daunting. Make things easier for yourself and start by writing research reports to document the underlying research. In the research reports, you gather, cite, and analyze all the evidence. You may discover gaps in the research that you need to address first.

Once you complete the research, the reports will make an excellent foundation for your case study. You will have a deep understanding of the research problem and solution, which will help you structure your case study. You will be able to copy fragments from the report, such as citations, transcriptions, or proof arguments. The order in which you present your problem will be different in the case study than in the report. The report often follows the order of the research, while the case study presents the results in the order that will make your argument easiest to follow for the reader.

© 2024, Yvette Hoitink, CG®, QG™

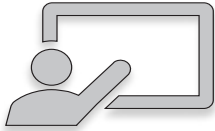


F101

Yvette Hoitink, CG, QG

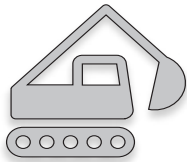
Four Farms, Four Names: From Research Report to Award-Winning NGSQ Article

From Idea to Finished Case Study



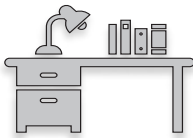
Determine the audience

- Where to submit, e.g. BCG portfolio, NGSQ, local magazine
- Check style guide, standards, author guidelines, requirements
- Expertise of the audience: beginner, intermediate, advanced



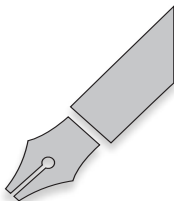
Select a case

- Survey past work
- Focus on solved cases
- Interesting methodology or sources
- What is the lesson learned?
- Relevance to wider audience



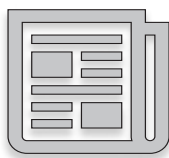
Write research reports

- Analyze existing research
- Create research plan to fill in gaps
- Complete the research
- Cite all the sources according to style guide
- Write report in the language of the case study



Write the case study

- Introduction: what will we learn? Why should we care?
- Set the stage, the 'hook'
- Use case study as example of the lesson
- Present your strongest evidence first
- Conclusion: lessons learned



Publish/submit

- Submit the case study
- Address comments
- Work with the editor (if for publication)

© 2024, Yvette Hoitink, CG®, QG™

#NGS2024GEN



F101

Yvette Hoitink, CG, QG

Four Farms, Four Names: From Research Report to Award-Winning NGSQ Article

Structure of Case Study: Examples

	Griete Smit’s Parentage: Proof in the Absence of Vital Records	Four Farms, Four Names: The Identity and Parentage of Dirk Weversborg of the Netherlands
	NGSQ 104 (December 2016): 245–256.	NGSQ 110 (March 2022): 53–66.
Introduction	Problem: lack of vital records. Solution: study the FAN, reconstruct property.	Problem: people named after farms, names changed when they moved. Solution: study the residences, FAN.
Setting the stage	Introducing Griete Smit and Harmen Nachtegael. Estimating vital data using available records. Deeds from 1628 mention sisters and property.	Introducing Dirk Weversborg and Gerritje Goossens. Marriage banns name father Jan Weversborg. Problem: No Dirk, son of Jan in baptismal records.
Developing hypothesis	Tracing the sisters: parents Peter Smith and Mechteld. Tracing the property: previous owners Peter Smith and Mechteld.	Tax records name Dirk, son of Jan te Hengeveld living at Weversborg, widower of Willemken te Huijsstede.
Researching and proving hypothesis	Researching Peter Smith and Mechteld.	Researching Jan and Dirk. Proof arguments proving identities of Jan and Dirk. Evidence correlation summary.
Conclusion	Summary of evidence. Lesson learned: record loss can be overcome by researching FAN and property, wars did not just destroy records but also created them.	Summary of evidence. Lesson learned: identity is more than a name, search broadly for residences and relatives.

© 2024, Yvette Hoitink, CG®, QG™

#NGS2024GEN



F101

Yvette Hoitink, CG, QG

Four Farms, Four Names: From Research Report to Award-Winning NGSQ Article

Further study

Reading

Board for Certification of Genealogists.
Genealogy Standards. Second edition, Revised.
Nashville, TN: Ancestry, 2021.

Gulbrandsen, Linda K. "Writing a Quality Research Report." Kory L. Meyerink, Tristan L. Tolma, and Linda K. Gulbrandsen, eds. *Becoming an Excellent Genealogist: Essays on Professional Research Skills*. ICAPGEN, 2012.

Jones, Thomas W. "Proof Arguments & Case Studies." Elizabeth Shown Mills, ed. *Professional Genealogy: Preparation, Practice & Standards*. Baltimore, MD: Genealogical Publishing, 2018. Pages 475–500.

_____. *Mastering Genealogical Proof*. Arlington, VA: National Genealogical Society, 2013.

Mills, Elizabeth Shown. "Research Reports." *Professional Genealogy: A Manual for Researchers Writers Editors Lecturers and Librarians*. Baltimore, MD: Genealogical Publishing, 2001. Pages 345–378.

_____. "Proof Arguments and Case Studies." *Professional Genealogy* (2001), 389–408.

Peters, Nancy A. "Research Reports." *Professional Genealogy* (2018), 415–451.

Courses and study groups

GenProof. <https://genproofstudygroups.com>.

Jones, Thomas W., coordinator. "Writing and Publishing for Genealogists." *Institute of Genealogy and Historical Research*.

<https://ighr.gagensociety.org/course-four/>.
NGSQ Study Groups.

<https://ngsqstudygroup.com>.

Powell, Kimberly. "Writing for Discovery." *Level Up Genealogy*.

<https://levelupgenealogy.com>.

ProGen. <https://progenstudygroups.com>.

Taplin, Cari, and Cyndi Ingle. "Study Groups." *Genealogy Pants*.

<https://genealogypants.com/studygroups/>.

Examples

"Genealogical Work Samples." *Board for Certification of Genealogists*.

<https://bcgcertification.org/learning/skills/genealogical-work-samples/>. Includes Hoitink, "Griete Smit's Parentage."

"National Genealogical Society Quarterly (NGSQ) & Archive." NGS.

<https://www.ngsgenealogy.org/ngsq/>.

Hoitink, Yvette. "Four Farms, Four Names."

<https://www.dutchgenealogy.nl/4farms/>

#NGS2024GEN



About the presenter

Yvette Hoitink, CG[®], QG[™] is a professional genealogist, writer, and lecturer from the Netherlands who specializes in tracing ancestry from the Netherlands and its former colonies, including New Netherland.

Website: <https://www.dutchgenealogy.nl>.

© 2024, Yvette Hoitink, CG[®], QG[™]



F102

Judy G. Russell, JD, CG, CGL
Courting America: Using Court Records for Genealogy



Overview: It is no secret among genealogists that court records are among the most valuable and versatile records that can be found to help flesh out a family's history. From jury lists to loose papers filed with the courts, these are records that can help us document family relationships, life events, community happenings and more.

Court Records in General:

Courts at all levels produced records that take four general forms: dockets; minutes; loose papers; and, in some cases, published opinions. Dockets are abbreviated often bullet-point entries kept by a court clerk to track a case from its start to its end. Minutes, sometimes called order books, are more detailed accounts by the clerk of the events in court during each day the court is in session. Loose papers—often collected as and called case files—are all of the papers filed by the parties or required by the court as the case progresses. Published opinions record the decision of the court on all or some of the issues in the case, together with the facts and reasons behind the decision. All four record types may exist in any given case, and all should be consulted where they survive.

Genealogical Uses of Court Records:

The uses of court records in genealogical research are many and varied. As to the individual(s) named in a document record, court records offer the potential to discover some or all of the following:

©2024 — Judy G. Russell, JD, CG®, CGLSM

#NGS2024GEN



F102

Judy G. Russell, JD, CG, CGL
Courting America: Using Court Records for Genealogy

- Why the person was in court (or named in the record);
- What his or her connection was to a specific event;
- Exactly where the person was on a specific day;
- What the person's legal residence was;
- How old the person was;
- What the person did for a living;
- The person's general economic status;
- Whether the person could read or write;
- What the person's signature was at that time;
- National origin;
- Religious affiliation;
- Family relationships to others in the same court record or set of records;
- Who might be numbered in the person's "FAN Club"—or who might be on an enemies list!

Beyond the facts we might find for a single individual or family, court records also help us uncover information about the general conditions and concerns in the area of the community in which our ancestors lived. Court records, both at the local level and in the higher courts, can be mined for information that puts our families into context.

Such information can include but is not limited to:

- What happened when death disrupted a family;
- General economic conditions: what it cost to live then and there;
- What it cost to raise a child;
- What happened if a debt wasn't paid;
- What local taxes were;
- The consequences of enslaved status;
- The value of domesticated animals; and
- Threats posted by wildlife.

Particular Goodies to Watch For:

All court records of all types have the potential to provide information or clues to our families that we simply will not find elsewhere. Some court records, however, are particularly valuable and should never be overlooked. Among the records where valuable data can be found are:

- **Heirship Lists:** In some colonies and states, lists of the persons who were the heirs at law of a person who had died and whose estate was being probated were required to be filed. These lists generally named every person who might be considered an heir by the law if either the deceased died without a will, or the will was ruled invalid. Depending

©2024 — Judy G. Russell, JD, CG®, CGLSM

#NGS2024GEN



on time and place, these lists may include spouses, children, siblings, nieces and nephews, parents, grandchildren and grandparents and more.

- **Probate Inventories:** Lists of physical possessions that had to be accounted for, and sometimes sold, during the probate of a deceased person's estate can provide many leads. Those who appear as purchasers of personal items like bedding and clothing are usually family. Those with the same surname as the deceased are also likely family. Others are likely neighbors. Estate inventories give direct evidence of socio-economic status—how well off the deceased was—and literacy if books and other written materials are listed. Inventories also often identified enslaved persons by name and sometimes even by relationship to other enslaved persons.
- **Divorce Filings:** Court papers filed in divorce cases can include dates and place of birth for husband and wife, dates and places of marriages including prior marriages, length of residence, the full names, birthdates and birthplaces of children, and all the juicy details of the marital breakdown that led to the case being filed.
- **Jury Lists:** The law generally set specific requirements for jury service, so finding someone on a jury list is evidence bearing on those requirements, including citizenship, legal residence, age (or age range), and more. Because it was important to know exactly who had been summoned for jury duty, individuals often have additional identifiers (“John the elder” or “Thomas the son of Abner” or “David the baker”) to distinguish them from same-named persons in the jurisdiction. Jurors who failed to appear when summoned were also recorded, sometimes with any excuse they later gave for non-appearance and sometimes with a clerk's or sheriff's notation that they had moved elsewhere.
- **Witness Lists:** People testifying for and against litigants in cases were people known to the parties or physically present when an event occurred. They were often family, friends, associates or neighbors (the “FAN Club”) of the parties, and those testifying against a party might be someone to include on an enemies list.
- **Reimbursement Records:** Witnesses and jurors were often reimbursed for their time and their mileage in coming to court. By subtracting any daily fee from the total reimbursement, and then dividing the remainder by the legal mileage rate, it's often possible to determine where—how far from the courthouse—the person lived.



Resources for Further Study

Genealogical Proof Standard/Process

1. Board for Certification of Genealogists. *Genealogy Standards*. 2d edition revised. Nashville, Tenn.: Ancestry, 2021.
2. Jones, Thomas W. *Mastering Genealogical Proof*. Arlington, Va.: National Genealogical Society, 2013.
3. Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace* (4th edition). Baltimore, Maryland : Genealogical Publishing Co., 2024.

Understanding Early Courts

4. Ellefson, Clinton A. *The County Courts and the Provincial Court in Maryland, 1733-1763*. New York : Garland Pub. Co., 1990.
5. Evans, C. Wyatt. *Politics, law, and disorder in a colonial court: the early records of Hunterdon County, New Jersey*. Master's Thesis, Drew University, Madison (1999).
6. Ireland, Robert. *County Courts in Antebellum Kentucky*. Covington, Ky. : University of Kentucky Press, 1982.
7. McCain, Paul M. *The County Court in North Carolina before 1750*. Historical Papers of the Trinity College Historical Society, ser. 31. Durham, NC : Duke University Press, 1954.
8. Winslow, Raymond A. "County Court Minutes" in Helen F.M. Leary, ed., *North Carolina Research : Genealogy and Local History*, 2d ed. Raleigh : NC Genealogical Society, 1996.
9. Willis, William. *A History of the Law, The Courts, and The Lawyers of Maine, From Its First Colonization to the Early Part of the Present Century* (1863). Reprint. Clark, NJ : The Lawbook Exchange, 2005.

Understanding Early Legal Terms

10. *Digital Georgetown*. (Digital collections of Georgetown University) "Legal Dictionaries." <https://repository.library.georgetown.edu/handle/10822/559416>
11. Drake, Paul. *What Did They Mean By That?* Westminster, Md. : Heritage Books, 2000.
12. —. *More What Did They Mean By That?* Westminster, Md. : Heritage Books, 2006.
13. Evans, Barbara Jean. *The New A to Zax: A Comprehensive Genealogical Dictionary for Genealogists and Historians*. Second Edition. Champaign, Illinois: B. J. Evans, 1990.

Guides to Court Records as Genealogical Records

14. FamilySearch Research Wiki. "United States Court Records." https://www.familysearch.org/wiki/en/United_States_Court_Records
15. Greenwood, Val D. *The Researcher's Guide to American Genealogy*, 3d ed. (Baltimore : Genealogical Publishing Co., 2000). See chapter 21, "Court Records."
16. Leary, Helen F.M. "Strategies for Court Records" in Helen F. M. Leary, editor. *North Carolina Research; Genealogy and Local History*, 2nd edition. Raleigh: North Carolina Genealogical Society, 1996. [Part of Chapter 2, "Designing Research Strategies"]
17. Luebking, Sandra; Loretto Dennis Szucs and Arlene H. Eakle. "Court Records," in Szucs, Loretto Dennis and Sandra Luebking, eds., *The Source*, 3d ed. (Provo UT : Ancestry, 2006).
18. Rose, Christine. *Courthouse Research for Family Historians: Your Guide to Genealogical Treasures*. 2d edition. San Jose, California: CR Publications, 2020.
19. —. *Courthouse Indexes Illustrated*. San Jose, California: CR Publications, 2006.
20. Rapaport, Diane. *New England Court Records : A Research Guide for Genealogists and Historians*. (Burlington, Mass. : Quill Pen Press, 2006).
21. Virginia Genealogical Society. *The Virginia Court System: A Genealogist's Guide to Early Court Records*. (Richmond : Virginia Genealogical Society, 2007).

Web addresses verified as of 4 February 2024

©2024 — Judy G. Russell, JD, CG®, CGLSM



F103

Craig R. Scott, CG, FUGA
The Impact of Bounty Land on Migration

The Impact of Bounty Land on Migration

Craig R. Scott, CG, FUGA
700 Falls Road
Rocky Mount, NC 27804
crscott@HeritageBooks

Military Bounty Land grants came into extensive use in the Federal period, but they were widely employed in the colonial period by colonial governments. There are four periods to be examined: the colonial period, the revolutionary period, the War of 1812 and Indian war bounties. These bounty lands were awarded by colonial governments for either military service or to create a buffer zone between the frontier and civilization in the east and those awarded by state governments for military service during the American Revolution. After the Revolution the federal government would assume the role of provider of bounty land. Since these were colonial and state governments the experience of each is different and depended largely on the availability of land. The later role of the federal government would also depend on the availability of land in the various military districts and scrip acts.

Bounty land is a grant of land from a government as a reward for past or future service to repay them for the risks and hardships that they have endured or will probably endure in the service of the state. Prior to the Revolution colonial and town governments provided land either as an inducement for service or as compensation for service. Land was used largely because it was available in an inexhaustible supply, at least prior to the Revolution. Revolutionary governments used land as a tool for creating support for the Revolution. Everyone knew that promised bounty land would not materialize unless the war was won.

Colonial Land for Military Service

New England

There were significant land grants to soldiers in almost every colonial New England battle, let alone war (you could be enlisted for a really short period and still receive full land grants).

Published accounts in one place are a problem. Most information comes in the original manuscript Massachusetts Bay and Massachusetts records, the Rhode Island State Papers, and Connecticut same.

There were earlier conflicts where land was granted, but not received in a particularly orderly fashion, before King Philip's War.

“a gratuity of land” Soldiers in King Phillip’s War “that if they played the man, took the Fort, & Drove the Enemy out the Narragansett Country, which was their great Seat, that they should have a gratuity of land beside their wages.”

#NGS2024GEN



F103

Craig R. Scott, CG, FUGA
The Impact of Bounty Land on Migration

The colony did not act on the promised land until 1685 when petitioners from several Essex County towns, as well as Hingham, petitioned for land [Mass Archives 112:398]. Towns of Western Massachusetts, Amherst, N.H., Buxton and Gorham, Maine, Bedford, and Voluntown, Connecticut.

Look in the Archives in each state for land grant petitions, both individual and group.

In New Hampshire, the “Town Charters” volumes of the State Papers (www.library.unh.edu/diglib/bookshelf/NHPapers/series.shtml) indicate which settled were bounty holders.

The town histories of almost every New England town, especially those done c1900 tell how the land was acquired and who the first settlers were....

Virginia

Colonial Land for Military Service

1630 - Governor's Council offered grants of land to persons who settled on the frontier.

1646 - Council issued patents to the fort captains and men for the lands on which outlying forts were built along with the lands surrounding the forts.

1701 - An unsuccessful attempt to garrison the frontier, patents equal to four times the headright was offered to groups of men who would undertake the defense of the frontier.

1763 - Bounty lands were offered as an incentive or reward to men who performed military service during the French and Indian War; however, the area in which the land was available was closed by the Proclamation of 1763, so it was not until 1779, and after, that was actually awarded.

State Awards following the Revolution

No Bounty Land – Delaware, New Jersey, New Hampshire, Rhode Island, or Vermont

Bounty Land States – Connecticut, Georgia, Maine, Maryland, Massachusetts, New York, North Carolina, Pennsylvania (donation lands), South Carolina, Virginia (includes Illinois Regiment).

Federal Bounty Land after the Revolution

Acts of 9 July 1788, 3 March 1803, 15 April 1806

The Military Districts

Scrip Acts transfer remaining bounty land grants into the public domain.



F103

Craig R. Scott, CG, FUGA
The Impact of Bounty Land on Migration

Federal Bounty Land after the War of 1812

Acts of 24 December 1811, 11 January 1812, 6 May 1812, and 27 Jul 1842

The Virginia Experience

Out of state migration

63% of Virginians, who received bounty land warrants for military service from Virginia in the War of 1812, were still residents of Virginia in 1850.

Generally, of those who moved, one third moved to a contiguous state.

Militia officers less likely to leave the state than enlisted men.

The longer the service of the militiaman the more likely they will move out of state.

Movers out of state had mean property holdings of \$732 in 1850 vs. \$1,963 for stay at homes.

The most important predictor of interstate migration was how far west the veteran lived in 1815. Westerners were more likely to move than easterners.

Within the State

85% of the War of 1812 veterans moved from their home counties to another Virginia county between 1812 and 1855.

In-state movers generally tended to move south and westward.

Southside Virginia counties receive, while the Northern Neck, Chesapeake counties and Middle Peninsula lose.

Mexican War

Act of 11 February 1847

General Bounty Land Acts (which also covered the Indian Wars prior to 1858)

Post 1790 Acts – 28 September 1850, 22 March 1852

All Wars – 3 March 1855 – 160 acres lifetime entitlement



F103

Craig R. Scott, CG, FUGA
The Impact of Bounty Land on Migration

Bibliography

Bockstruck, Lloyd DeWitt, *Revolutionary War Bounty Land Grants: Awarded by State Governments*, Baltimore, Md.: Genealogical Publishing Company, 1996

Bockstruck, Lloyd DeWitt, *Bounty and Donation Land Grants in British Colonial America*, Baltimore, Md.: Genealogical Publishing Company, 2007

Brown, Margie, *Genealogical Abstracts, Revolutionary War Veterans Scrip Act 1852*, Lovettsville, Va.: Willow Bend Books, 1997

Carstensen, Vernon, ed., *The Public Lands, Studies in the History of the Public Domain*, Madison, Wisc., University of Wisconsin Press, 1962

Hone, E. Wade. *Land and Property Research in the United States*. Salt Lake City, Utah: Ancestry.

Hubbard, Benjamin Horace, *A History of the Public Land Policies*, Madison, Wisc., University of Wisconsin Press, 1965

Oberly, James W., Westward Who? Estimates of Native White Interstate Migration After the War of 1812. *The Journal of Economic History*, Volume 46, No. 2 (June, 1986), pp. 431 – 440.

Oberley, James W., *Sixty Million Acres, American Veterans and the Public Lands before the Civil War*, Kent, Ohio: Kent State University Press, 1990

Rose, Christine, *Military Bounty Land 1776 – 1855*, San Jose, Calif.: CR Publications, 2011

Smith, Clifford Neal, *Federal Land Series, Four Volumes*, Baltimore, Md.: Clearfield Company, 2004

Stagg, J. C. A., Soldiers in Peace and War: Comparative Perspectives on the Recruitment of the United States Army, 1802 – 1815, *The William and Mary Quarterly, 3rd Series*, Volume 57, No. 1 (January 2000), pp. 79-120.

Taylor, Philip F. and Samuel M. Wilson, *Kentucky Land Warrants for the French and Indian and Revolutionary Wars*, Greenville, S.C.: Southern Historical Press, 1994 [this is two books combined into one binding by this publisher]



F104

David E. Rencher, AG, CG, FUGA, FIGSRS
Irish Immigration-Digging Deeper

Irish Immigration-Digging Deeper

NGS Virtual Conference 16-18 May 2024
David E. Rencher, AG®, CG®, FUGA, FIGRS
© All rights reserved.

INTRODUCTION

Are your Irish ancestors not appearing in the usual sources? Let's take a look at new strategies and sources to use when standard records have failed to identify their origins and nativity in Ireland. First, have you *really* checked all of the "standard" sources and done the extensive destination research needed? Frequently, this information needs to be reexamined and reevaluated as your skills have developed over time. Perhaps you've covered the census, naturalization, church, military, passenger lists and more and have not yet found the piece of evidence needed.

Although you remember checking a specific source of information in your research, have you learned new skills and techniques since that time that you didn't apply to the record when you first examined it? It's time to frame a research strategy using alternative sources and methodologies.

FRAMING THE PROBLEM

Framing the problem for each research objective is vital to focusing on what evidence needs to be gathered. Researchers can be easily distracted by evidence unrelated to the current research problem and thus lose focus on the real objective. All of this information begins to cloud the picture and becomes overwhelming when looked at collectively.

The technique of framing your research problem creates a focus on what elements need to be within the frame and without the frame. The problem should be evaluated from various angles to overcome "frame blindness." Frame blindness occurs when you have researched a problem for so long that you can only see it from one angle. For example, you assume that everyone had to own or lease land in Ireland and fail to account for a landless research frame. Refocusing your research to a landless research frame will lead to alternate research techniques and a different set of records.

DEVELOPING A SOCIAL PROFILE

The friends, associates, and neighbors (FAN) research strategy coined by Elizabeth Shown Mills, or alternatively called cluster research by others develops a research approach that examines the social network and interactions of those who live in the same neighborhood and/or have interactions with each other. These relationships are illuminated through the direct or indirect evidence from the records examined.

Three elements of framing a social profile:

- Developing an individual profile.
- Reconstructing the neighborhood.
- Examining their social network.

Emigration to the Americas was driven by one of two factors. The immigrant was either pulled or pushed from their homeland and sometimes a combination of both. The social network is the strongest of the factors. Correspondence or word-of-mouth illuminated the availability of land and job opportunities. For the Irish, the ownership of land was a strong pull to America. Generations of the immigrants' ancestors had never experienced actually



F104

David E. Rencher, AG, CG, FUGA, FIGSRS
Irish Immigration-Digging Deeper

owning land, that was reserved for a limited few, the privileged landed class. The multiple ways to obtain land through hard work, military service of bounty lands, marriage, or inheritance all fed the American dream.

OVERLOOKED SOURCES AND RECORDS

Naturalization Sources

Locating naturalization records in the usual sources is complicated enough. The Declaration of Intent frequently isn't in the same locality as the Final Naturalization documents. Since the place of nativity is more frequently listed on the Declaration of Intent, it is the preferred document to locate. However, copies of naturalization documents may be found in a variety of places and digging deeper is sometimes warranted.

Cataloging conventions may have caused us to rely too heavily on how a particular record was cataloged. When using the FamilySearch Catalog, the records may be accessed by locality and record type. However, when a record type such as "Probate Records" includes entries for naturalization, that "trace heading" isn't always added to the record. Thus, even though the probate records for the county were imaged, and other naturalization records were imaged, you may be missing records by not doing a reasonably exhaustive search.


Occupational Strategies and Resources

Knowing the occupation of an immigrant can be very useful in connecting them to their homeland. In many instances for the skilled laborers, they were apprenticed and may have grouped together during the immigration experience. Having money to immigrate and having sufficient money once they arrived was foremost in their minds. This was also on the minds of those who were looking to assist immigrants to come to the Americas.

In the example below, Messrs. W. & T. Adair are advertising that they can help "procure employment for a number of those who emigrate by their Packet Ships; and those wishing to proceed to New York, Philadelphia, or Pittsburgh, can be forwarded." By recognizing that Baltimore may not be their preferred destination, they hope to entice passengers whose preferred destination is another city.

BALTIMORE PACKET SHIPS.

The fast-sailing coppered Ship
M A R S,
Burthen, 520 Tons,



Will Sail from this Port for **BALTIMORE**, about 25th April. The exact day Passengers must be in Belfast, to go on board, will be mentioned in a future Advertisement. This Ship has most superb accommodation for Passengers; being very roomy, and fully seven feet high between decks. Those who intend proceeding to the United States by such a desirable conveyance, should make immediate application, as a great many of the Birtls have already been engaged in Baltimore. Messrs. W. & T. ADAIR can procure employment for a number of those who emigrate by their Packet Ships; and those wishing to proceed to New York, Philadelphia, or Pittsburgh, can be forwarded.
For Freight or Passage, apply to
GEORGE ASH.
Waring-street, Belfast, 31st March, 1832. (55)

"Baltimore Packet Ships," *Belfast Newsletter*, Friday 6 April 1832, *The British Newspaper Archives* (<https://www.britishnewspaperarchive.co.uk/viewer/bl/0000038/18320406/012/0003> : accessed 3 February 2024), page 3; column 5.

#NGS2024GEN



F104

David E. Rencher, AG, CG, FUGA, FIGSRS
Irish Immigration-Digging Deeper

By investigating Messrs. W. & T. Adair, one may learn what type of employment they offered and by associating with whom they emigrated valuable clues as to their parish of origin may be derived. Using tax records and other sources where the emigrant settled may be helpful in reconstructing with whom they travelled if they relocated from Baltimore to one of the other cities mentioned.

Emigrant Assistance

Many researchers are familiar with the Emigrant Savings Bank in New York City and their records.¹ Interestingly, in addition to having a good number of Irish emigrants, it also has entries for African Americans. These records recorded places of nativity and may give clues to the origins of those who moved from New York City inland. Research strategies should always include tracing migration paths back to the ports of suspected origin.

Ports of origin may be other than those commonly known. Not everyone living in New York or New Jersey for example came into the state through the port of New York City. There is evidence of immigrants landing in Hamboy (Perth Amboy), New Jersey and Lewistown, New York among others.

There are identified agents who orchestrated travel for immigrants between the Americas and Ireland. These were private records, and many are still waiting to be identified in both America and Ireland.

Federal Record Solutions in Unexpected Sources

In his recent publication, Dwight A. Radford outlined strategies for tracing the Scots-Irish who had intermarried with the Southeast Native American tribes.² The major sources for information on these families are in the collections of the National Archives, Washington, DC. The research is complicated by the removal of the five civilized tribes to Oklahoma, thus the Oklahoma Historical Society also has records that may be helpful. Mr. Radford goes into detail in his chapter on these records and using updated strategies to trace the origins of Scots-Irish settlers in the Southern States.

IDENTIFYING THE SOURCES

Internet genealogy has given us a false sense of completeness in the available records. The online images primarily come from readily available collections that have been gathered in state archives, county courthouses, libraries, and genealogical or historical societies. Frequently overlooked are the manuscript collections in University libraries and other lesser known libraries, archives and societies.

Mining the Miscellaneous Manuscripts

The miscellaneous manuscripts may be found in many of the online inventories of libraries and archives. In many instances, the information isn't detailed enough to illuminate the data you may be seeking. The National Archives staff recognized this when they created the Citizen Archivist program that allows users of the materials to further detail the information within the record sets and classes.

1. "New York, U.S., Emigrant Savings Bank Records, 1850-1883," *Ancestry.com* (<https://www.ancestry.com/search/collections/8760/> : accessed 4 February 2024).

2. Radford, Dwight A. *American Scots-Irish Research, Strategies and Sources in the Quest for Ulster-Scots Origins* (Orting, Washington: Family Roots Publishing Co., 2020) pp. 199-239.



F104

David E. Rencher, AG, CG, FUGA, FIGSRS
Irish Immigration-Digging Deeper

In most communities, there have been a number of antiquarians and historians who have gathered and described record sources and materials from their community or subject of interest. Often, their collections are deposited after they are deceased or some with forethought have chosen where their materials will be deposited.

The key to identifying these collections is querying specifically about who the antiquarians and historical researchers were in any given area. In addition to local repositories, look also at surrounding repositories or those with specialized collections about the area.

The FamilySearch catalog gives you easy access to Archives Grid, “a collection of nearly two million archival material descriptions, including MARC records from WorldCat and finding aids harvested from the web.”³ Archive Grid has been widely contributed to by the university and college communities. Their manuscript libraries frequently hold the family papers of alumni and other notable persons. While your direct ancestor may not have been an alumni, relatives or those who knew the family may. Their correspondence may contain key clues to identifying the place of nativity for your family.

The FamilySearch Research Wiki has immigration pages for key states. For example, the New York Emigration and Immigration page. See: https://www.familysearch.org/en/wiki/New_York_Emigration_and_Immigration. These pages give numerous links to additional information that may be sources or resources that haven’t been fully explored. Further, additions are continually made so they should be revisited regularly.

When visiting archives and libraries to examine the records, the archival filing system usually breaks down collections in high-level categories:

- Correspondence, letters
- Articles of agreement
- Land, legal, and estate papers
- Bonds, receipts, notes, power of attorney

These files must be examined page-by-page and can frequently add enormous value to your FAN network. Starting with the correspondence and letters looking for letters that originated in the homeland is recommended.

CONCLUSION

If you haven’t expanded the profile of your immigrant to include the friends, associates, and neighbors consider doing so. The bigger picture of the community can help expand the possibilities of what pulled them there through the connections in their homeland.

Include in your expanded profile the associations through all legal records, church associations, neighborhoods, fraternal organizations, and others.

Identify what is happening in the social picture of the community. Are there epidemics, significant political events, employee strikes or other events that would identify alliances between heretofore unknown associates.

New records and sources continually become available and are hidden in various collections. Digging deeper into the resources of archives and libraries can uncover new resources and solutions to challenging immigration problems.

3. FamilySearch Catalog Search Page, *FamilySearch.org* (<https://www.familysearch.org/search/catalog>) accessed 4 February 2024



F105

Daniel Horowitz

Using Advanced DNA Tools to Understand Your DNA Matches on MyHeritage

Using Advanced DNA Tools to Understand Your DNA Matches on MyHeritage

By: Daniel Horowitz - Daniel@MyHeritage.com - Twitter: [@MyHChiefGen](https://twitter.com/MyHChiefGen) - Instagram: [horowitz_daniel](https://www.instagram.com/horowitz_daniel)

Introduction to DNA

Our bodies are composed of cells. Inside each cell nucleus is an identical copy of the unique instruction manual for YOU, written in DNA. There are more than 30 trillion cells in our bodies and each nucleus contains a copy of your DNA. No one else's DNA is exactly like yours. So, if you know how to read your DNA, you can learn a lot about who you really are.

We inherit 50% of our DNA from our mothers and 50% from our fathers. They each received 50% of their DNA from each of their parents as well. So, your DNA contains about half of your mom's DNA and half of your dad's, which is also about 25% of the DNA of each of your grandparents.

While you have a large portion of DNA in common with close relatives, you have a smaller portion in common with more distant relatives. Two distant cousins who have never met but have a common ancestor will have a small piece of DNA inherited from that ancestor in common. That's the basis for using DNA tests to discover relatives you otherwise wouldn't know about.

How much DNA you share with a relative depends on how many generations back your common ancestor was. Used in combination with our huge database of family trees containing the types of clues discussed above (such as gender and age), MyHeritage DNA has reunited families all over the world.

Theory of Family Relativity™

This revolutionary technology saves you dozens of hours of research by synthesizing billions of data points to craft multiple theories about how you and your DNA Matches might be related. This feature presents genealogical theories that may explain how you're related to a DNA Match. Each Theory of Family Relativity™ is created by connecting billions of tree profiles and historical records on MyHeritage.

The Theory of Family Relativity™ is based on a big data graph that connects data drawn from thousands of databases on MyHeritage in real time. Internally, we refer to it as the "Big Tree." Every node on this graph represents a person, and every edge depicts a blood relationship between two individuals, either described in a family tree or

#NGS2024GEN



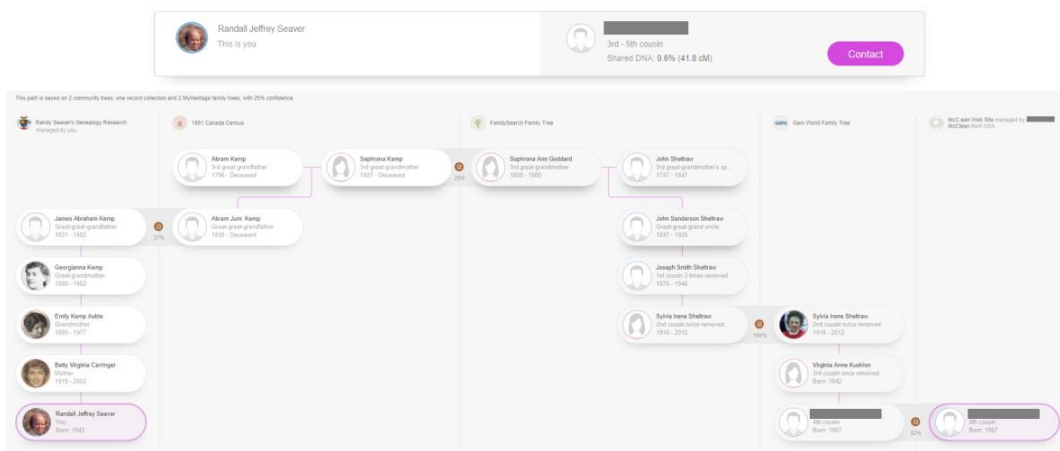
F105

Daniel Horowitz

Using Advanced DNA Tools to Understand Your DNA Matches on MyHeritage

a historical record or inferred from a match between two tree profiles or two records that are likely to be referring to the same person.

The number of theories you may get depends on several factors, such as the size and level of detail in your family tree (the more the better). This number will increase over time as more users test their DNA on MyHeritage or upload their DNA results, = as we continue to add more historical records, and as family trees continue to grow.



#NGS2024GEN

It is important to keep in mind that this revolutionary feature produces theories that are just that — theories. They are based on a lot of information provided by other users who may introduce mistakes in family trees as well as matches between tree profiles and records that may be inaccurate. We strongly suggest that you review the theories in depth and judge for yourself whether each one is accurate and decide how to best proceed further with your genealogical research. Verifying everything is a best practice that every good genealogist should do regarding all clues and evidence. Remember that theories can be very helpful, but they are not always correct.

When more than one theory is available, this means that we have identified several theories with different relationships between you and the DNA Match. This can happen when people in the family have married within the family in earlier generations. In these situations, you can choose which theory to view by choosing from the drop-down menu.

Chromosome Browser

Chromosome browsers are tools that allow you to see the unique DNA segments, or sequences of DNA on chromosomes, shared between you and either one genetic match or a set of genetic matches. Chromosome browsers are typically displayed graphically as 23 stripes, representing your 23 chromosomes, with colored sections



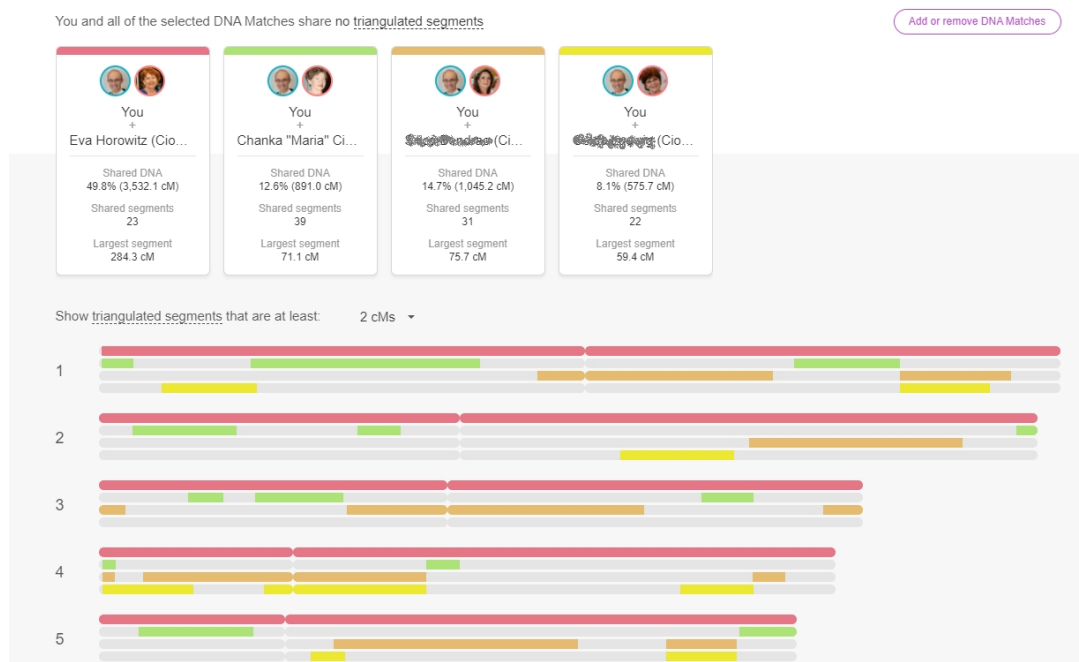
F105

Daniel Horowitz

Using Advanced DNA Tools to Understand Your DNA Matches on MyHeritage

indicating shared segments. Using a chromosome browser, you can view the start and stop locations of specific shared segments.

The One-to-Many Chromosome Browser allows you to explore which DNA segments you (or anyone whose DNA kit you manage) share with each of up to seven DNA Matches simultaneously.



This capability is important for understanding DNA Matches' relationships because triangulated (shared) segments are more likely to be inherited from a common ancestor. It's important to note that every segment shared between two people is triangulated, but segments that seem to be shared by three or more people are not necessarily triangulated. For example, if you compare yourself with two people, you may see that you share a segment with person A, and at the same genomic position, you also share a segment with person B; but A and B may not match each other on that segment. That's because you may share your maternal segment with A and your paternal segment with B, while A and B aren't related to each other at all. However, if a match is shown as triangulated, it means that you, A, and B all match each other precisely on that segment, and therefore all of you are probably related, and you probably got that triangulated segment from the same common ancestor.

When you initiate a comparison, the top of the page now displays one or more match cards with a colored bar on top, representing your match with each specific DNA Match

#NGS2024GEN



F105

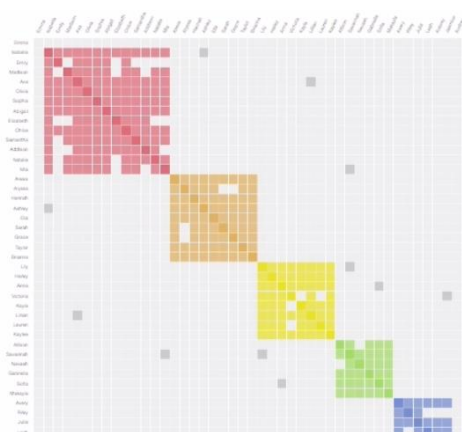
Daniel Horowitz

Using Advanced DNA Tools to Understand Your DNA Matches on MyHeritage

you selected. Each match card indicates the DNA Match parameters between you and that person (shared DNA, number of shared segments, and the size of the largest segment).

Below, for each one of the 22 chromosomes, the DNA segments that you share with each one of the selected DNA Matches will appear in the same color as on the match card. The color coding helps you keep track of the various matches.

AutoClusters



Organizes your MyHeritage DNA Matches into shared match clusters that likely descended from common ancestors. By grouping together DNA Matches who likely belong to the same branch and have a common ancestor, AutoClusters can be very helpful in shedding light on the relationship paths that connect you and your matches. By reviewing family trees of clustered matches, users can piece together the entire branch. Clusters are color-coded for convenience and presented in a powerful visual chart, as well as in list format.

Each color represents one shared match cluster. Members of a cluster match you and most or all of the other cluster members. Every individual in a cluster will likely be on the same ancestral line, although the most recent common ancestor between any of the matches and between you and any match may vary.

Labels for DNA Matches

Labels allow you to assign color-coded labels to your DNA Matches to help you organize and sift through them. Using labels, you can create customized groups of matches and filter your match list to focus on the matches you are most interested in. Multiple labels can be assigned to each match. You can also “star” your favorites.

cM Explainer™

This feature estimates familial relationships between DNA Matches, providing predictions of possible relationships between the two people, and their respective probabilities. cM Explainer™ calculates the relationship predictions using the ages of individuals, in addition to the amount of shared DNA.

#NGS2024GEN



F201

Karen Stanbary, MA, LCSW, CG

Flip it!—A Case Study—Negative Chromosome Painting Reveals Misattributed Parentage



Flip It: A Case Study Negative Chromosome Painting Reveals Misattributed Parentage

Board for Certification of Genealogists® Skillbuilding Lecture

Karen Stanbary, LCSW, AM, CG®

<https://karenstanbarygenealogy.com>

info@karenstanbarygenealogy.com

Takeaways

- Chromosome mapping satisfies our genealogical souls.
- Chromosome mapping is a reference to peek behind long-standing genealogical brick walls.
- Within each mapped segment for an individual, there will be smaller segments representing contributions from more distant ancestors.
- Use confirmed mapped segments to identify potential focal study group members to prove your biological ancestral line.
- The tortoise will win the race.

What is Chromosome Mapping?

Chromosome mapping is the process of marking or “mapping” specific inherited atDNA segments on an empty chromosome browser based on the most recent confirmed common ancestral couple on an ancestral line. This work is typically an ongoing project as the researcher maps segments based on one genealogical conclusion at a time.

We all love to see the bits of DNA we inherited from specific ancestors. It’s fun and feeds the genealogist soul. For most genealogists, looking at a visual representation of the specific segments inherited from identified ancestors is uniquely satisfying. It is proof that “my ancestors live on in me.”

I recommend everyone create a chromosome map for themselves. Doing so helps to teach the fundamentals of the decision-making inherent in the process. As with all things genealogy, start with simple problems first to learn the methodology.

A chromosome map, even partially complete, is a powerful tool to solve long-standing genealogical brick walls. Think about the process of solving a 1,000-piece puzzle. Typically, we begin forming the outside boundary. Then we carefully attach pieces, one at a time. The more complete the puzzle, the easier it is to place added pieces. The more complete the chromosome map, the easier it is to bring unknown fuzzy connections into sharp focus.

Copyright © 2024, Karen Stanbary, CG® All rights reserved.

#NGS2024GEN



F201

Karen Stanbary, MA, LCSW, CG

Flip it!—A Case Study—Negative Chromosome Painting Reveals Misattributed Parentage

This lecture focuses on the utility of the chromosome map as part of your genealogy bag of tricks. Potential applications of the chromosome map include:

- Identification of chromosomal segments inherited from specific ancestors
- Ability to group unknown matches into focal study groups
- Generation of hypotheses about the source of shared autosomal DNA that may suggest new research locations and surnames
- Confirmation that traced ancestors are biologically related
- Identification of potential misattributed parentage

Requirements

Currently there are two good options available to create chromosome maps—*DNAPainter* and *Genealogical Data Analysis Tool*.

DNAPainter is a website, created by Jonny Perl, providing the ability to map shared atDNA segments to a most recent common ancestor or ancestral couple. Additionally, it offers tools to help you estimate your relationship to matches. It has a free option (limited—allows only one chromosome map per registered user) or a subscription option with increased functionality. DNA Painter is user-friendly and there are many webinars available to assist you.

Genealogical Data Analysis Tool (GDAT) is a powerful free software, created by Becky Mason Walker, useful to organize and analyze atDNA match data. GDAT has a built-in chromosome mapper available for multiple profiles in the same database facilitating comparative data analysis. To create the chromosome maps, you will need to install and load files into the database. GDAT is the chromosome mapping tool I use.

Chromosome Mapping Preliminary Steps

A Chromosome Map provides intermediate conclusions useful in conclusions about genealogical relationships. Consistent with *Genealogy Standards*, intermediate conclusions should meet the Genealogical Proof Standard and be source-cited.

Determination of the most recent common ancestral couple is required prior to mapping a segment. Conclusion of a specific genetic relationship that meets the Genealogical Proof Standard is much more complex than the simple identification of the same name in your pedigree and that of your match. A confirmed genetic relationship requires:

1. All evidence points to just one conclusion.
 - Competing ancestors must be ruled out until only one ancestor remains.

Copyright © 2024, Karen Stanbary, CG® All rights reserved.

#NGS2024GEN



F201

Karen Stanbary, MA, LCSW, CG

Flip it!—A Case Study—Negative Chromosome Painting Reveals Misattributed Parentage

- Pedigrees of both the base test taker and the selected matches are carefully analyzed for:
 - Possibility of multiple common ancestors
 - Gaps in the pedigree who could represent the common ancestor
 - Accuracy of the pedigree
 - Depth of the pedigree
- 2. Any conflicting evidentiary items must pass through tests of analysis which requires grouping. A decision to discard conflicting evidence requires justification.
- 3. The number of DNA test takers must be sufficiently expansive to rule out competing hypotheses.
- 4. The genetic evidence must be correlated with documentary evidence for ancestral lines of descent. In cases of unknown parentage, the correlation involves documentary research for place and time of conception.
- 5. Each parent-child relationship in an ancestral line of descent from the Most Recent Common Ancestral Couple to each DNA test taker must be documented.
- 6. The amount of shared DNA is consistent with the known statistical parameters of the hypothesized relationships.
- 7. Alternative relationships supported by the amount of shared DNA are ruled out (typically using documentary sources).

Remember—just because you identify a common ancestor does not mean it is THE COMMON ANCESTOR! It is a hypothetical candidate. This hypothesis must pass through tests of analysis and correlation before a genealogical conclusion is proved. Record your analysis and thoughts as you move through this process.

The Process

Chromosome mapping requires several steps:

1. Identify a specific match segment of interest. For most cases, I recommend mapping second to fourth cousins. Kin closer than second cousins share too much DNA to make the chromosome map meaningful. The point of the chromosome map is to distinguish between different ancestral line contributions.
2. Research and prove a genealogical conclusion of the most recent common ancestral couple between the base test taker's kit and the genetic match. This includes the identification if the match is on the base test taker's paternal or maternal side.

Copyright © 2024, Karen Stanbary, CG® All rights reserved.

#NGS2024GEN



F201

Karen Stanbary, MA, LCSW, CG

Flip it!—A Case Study—Negative Chromosome Painting Reveals Misattributed Parentage

3. Map the segment data in the chromosome mapping workspace. This data includes the match name, chromosome number, shared segment start and stop points, the total cM of the shared segment, and the SNP count.
4. Analyze and compare the mapped segment to the rest of the overlapping segments for consistency.

Challenges

The majority of our atDNA matches are in the *Ancestry* database. *Ancestry* does not provide chromosomal data (specific chromosomal and segment start and stop locations). Even if you have a proven genealogical conclusion of the MRCA with an *Ancestry* match, you cannot map it. The only work-around is to ask the match to transfer the raw data to *FTDNA* (\$19), *MyHeritage* (free), or upload to *GEDmatch* (free).

Mapping segments from a match who shares multiple common ancestors (pedigree collapse) or whose ancestors are from endogamous populations is particularly challenging. Yet, the investment in hard work pays off. Sometimes the best way through these murky waters is to employ a variety of techniques, including chromosome mapping. For details, see Kimberly Powell's chapter in *Advanced Genetic Genealogy* (Selected Resources).

REMEMBER: None of this data answers a research question. It provides a new way to visual the data to mine for evidence meaningful to a genealogical research question.

Exercise Caution

- Small matching segments may be pseudosegments. Mapping pseudosegments will cause the whole tower to come cascading down. Use caution before mapping segments smaller than 15 cM.
- Avoid circular reasoning. Do not use hypothetical matches to segment map blank chromosome segments.

Selected Resources

International Society of Genetic Genealogy (ISOGG). Wiki. "Chromosome Mapping." https://isogg.org/wiki/Chromosome_mapping : 2023.

Perl, Johnny. "An Introduction to DNA Painter." Webinar. *Legacy Webinars*. 3 April 2019. <https://familytreewebinars.com/webinar/an-introduction-to-dna-painter/> : 2023.

Powell, Kimberly T. "The Challenge of Endogamy and Pedigree Collapse." Debbie Parker Wayne, ed. *Advanced Genetic Genealogy: Techniques and Case Studies*. Cushing, Tex.: Wayne Research, 2019. Pages 127–53.

Walker, Becky Mason. *Genealogical DNA Analysis Tool*. <https://sites.google.com/view/genealogical-dna-analysis-tool> : 2023.

Copyright © 2024, Karen Stanbary, CG® All rights reserved.



F202

David M. McCorkle
Using Artificial Intelligence (AI) Tools for Land Records Analysis

Using Artificial Intelligence (AI) Tools for Land Records Analysis

By David M. McCorkle
dmccorkle@nchistoricalrecords.org



Image generated by DALL-E

Deed	Grantee	Grantor	Date	
5	Zachariah Jones	Robert Avery	Jan 20, 1761	Along the main road Baker and land forr
50	Benjamin Sanders	William Baker	Jan 19, 1778	Part of land given b to Moses Barber, a
65	Josiah Gilbert	Francis Newby	Dec 6, 1736	So Wt Side of Perq
134	Luke Sumner	Abraham Sanders	July 1748	Bill of sale for a neg Luke Sumner.
159	Abraham Sanders	Benjamin Sanders	Aug 19, 1723	S.W. side of the "na mouth of "Chinque
176	Abraham Sanders	William Lamb	Oct 13, 1755	So Wt side of Perq Harvey, to line of Jc

GOAL: Use AI tools to process genealogical evidence from land records in a more comprehensive and less time consuming manner.

COMMON LAND RECORDS IN THE U.S.

PATENTS (*land grants*): Transfers of unowned "vacant" federal or state government land to individuals or organizations.

DEEDS: Transfers of privately owned land to individuals, organizations, or governments.

TAX RECORDS: Land has been taxed in almost all jurisdictions, and records will show who owned land at some point in time, but not necessarily the exact location.

COURT RECORDS: Both routine registration of land along with sometimes very detailed information related to disputes over borders and ownership.

ESTATE RECORDS: Land was one of the major types of property found in wills and estate files, often described in detail. This is also where land was often divided.

For all records:

GRANTOR is who land is transferred from, i.e. the seller(s) of the land.

GRANTEE is who land is transferred to, i.e. the buyer(s) of the land.

GENEALOGICAL INFORMATION FOUND IN LAND RECORDS

- Names of grantee (buyer) and grantor (seller) and their minimum ages
- Names of spouse, children, and other relatives
- Names of neighbors
- Location of the land itself

Copyright © 2024 by David M. McCorkle

#NGS2024GEN



F202

David M. McCorkle

Using Artificial Intelligence (AI) Tools for Land Records Analysis

- Location of roads, mill, cemeteries, and other made-made artifacts
- Hints as to wealth or lack thereof
- Occupations or military service
- Prior residence(s) of grantee
- Future residence(s) of grantor

ARTIFICIAL INTELLIGENCE BASICS (a moving target!)

- Large Language Models (LLMs) allow contextual "understanding" of land records, and some have been "trained" to understand surveying concepts.
- LLMs can process large amounts of text and extract the information of interest thus saving quite a bit of time.
- LLMs can compare information to identify related parcels of land.
- AI can be used to read handwritten geographical names, location names, and even personal names found in maps.
- AI can be used to read handwritten documents, even older ones in cursive.
- Map generation is very possible with AI, but none of the common models have this ability (yet).

POPULAR AI MODELS/CHATBOTS (as of early 2024)

The features and even names of these are in constant flux, and well as new models being introduced. Always check for the latest information. Most listed accept multiple types of input.

- ChatGPT (Open AI). <https://chat.openai.com>
- CoPilot (Microsoft). <https://copilot.microsoft.com/>
- Gemini (Google). <https://gemini.google.com>
- LLaMA (Meta/Facebook). <https://llama.meta.com/>

CHALLENGES WITH LAND RESEARCH WHERE AI CAN HELP

- Summarizing and organizing large groups of records such as in a deed book
- Scanning abstracted and/or handwritten land records for an ancestor's name (note they don't have to be the property owner)
- Extracting property descriptions (metes and bounds or PLSS) to help determine if two documents refer to the same property. Can also be used to map the property.
- Research historical information about a particular location and time either by using its trained knowledge or browsing the current internet.
- Scan maps for geographical and human names. This can be individual maps or groups of maps such as the David Rumsey collection.

Copyright © 2024 by David M. McCorkle

#NGS2024GEN



F202

David M. McCorkle

Using Artificial Intelligence (AI) Tools for Land Records Analysis

FINDING LAND GRANTS

- Federal Land States – Bureau of Land Management: General Land Office Records
<https://glorerecords.blm.gov/>
- State Land States – Different locations and availability depending on the state
 - Many are on FamilySearch (free)

FINDING DEEDS

- County Register of Deeds / Recorder Office
 - Websites typically free, but wide variation in availability of older deeds
 - In person: free to look, typically a small fee to copy
- FamilySearch website (free)

FINDING DEED/GRANT ABSTRACTS / TRANSCRIPTIONS

- State and county genealogy libraries
- County genealogical and historical society journals and websites
- Personal genealogical websites
- USGenWeb

LAND RESEARCH TERMS

CADASTRAL MAP. A map showing property boundaries and owners for a specific region

CHAIN OF TITLE. The history of ownership transfers for a particular piece of land.

CONVEYANCE. Transfer of land from one party to another, typically with deeds or patents.

DEED. A instrument for transfer of land between private persons or organizations.

GRANTEE. The party buying or receiving land, typically by DEED or PATENT.

GRANTOR. The party selling or transferring land, typically by DEED or PATENT.

LAND GRANT. A grant of a land PATENT; transfer of vacant government land to private party.

LOT. A specific parcel in a subdivided area, such as a town, typically identified by a number.

METES and BOUNDS. A system used to describe property boundaries. METES describe direction and distance, and BOUNDS describe boundaries.

PARCEL. A defined area of land owned by a person or organization.

PATENT. An instrument for transfer of vacant land from the government to private ownership.

PLAT MAP. A drawing of a specific area of land, typically for conveyance or verification.

Copyright © 2024 by David M. McCorkle



F202

David M. McCorkle
Using Artificial Intelligence (AI) Tools for Land Records Analysis

PLSS. Public Land Survey System, used to describe property granted by the Federal Government. A standard system of pre-defined grids is used.

PROVE. To validate the authenticity of a deed, often required for county registration.

SURVEY. To measure and record land boundaries; also refers to the resulting document.

ARTIFICIAL INTELLIGENCE TERMS

ARTIFICIAL INTELLIGENCE. Basically, having computers "think" and "learn" like humans so they don't have to be programmed for each specific task.

GENERATIVE AI. AI software that creates (generates) output such as written text, images, and sound, typically based on prompts provided by humans.

HALLUCINATIONS. False information generated by AI that is presented as factual.

LARGE LANGUAGE MODEL (LLM). AI software that specializes in understanding natural language, and is trained on vast amounts of data.

LAND RESEARCH RESOURCES - BOOKS

Hatcher, Patricia Law. *Discover Your Ancestors Using Land Records*. Baltimore, MD: Genealogical Publishing Company, 2016.

Hone, E. Wade. *Land and Property Research in the United States*. Provo, UT: Ancestry Publishing, 1997.

LAND RESEARCH - WEBSITES

County GIS systems. Just google for the county you are researching.

David Rumsey Map Collection. <https://www.davidrumsey.com/>

Familysearch Wiki "United Land and Property".

https://www.familysearch.org/en/wiki/United_States_Land_and_Property

Library of Congress Maps Collections. <https://www.loc.gov/maps/>

The Newberry Atlas of Historical County Boundaries.

<https://digital.newberry.org/ahcb/>

Survey terms. <https://www.directlinesoftware.com/survey.htm>

USGS Topographic Maps. <https://ngmdb.usgs.gov/topoview>

LEARNING AND USING AI FOR GENEALOGY

Note: Almost every major genealogy website has some sort of AI offering, and many bloggers have at least one article about AI. The following resources are devoted specifically to this topic.

AI Genealogy Insights (Steve Little). <https://aigenealogyinsights.com/>

Genealogy and AI (Facebook group). <https://www.facebook.com/groups/1255245945084761>

Copyright © 2024 by David M. McCorkle



F203

Rick Sayre, CG, CGL, FUGA
Territorial Papers of the US (1787–1912) – a Treasure Often Overlooked

Territorial Papers of the US (1787-1912) A Treasure Often Overlooked Rick Sayre, CG®, CGL, FUGA RICKSAYRE@GMAIL.COM

Overview. In 1911 David W. Parker in his *Calendar of Papers in Washington Archives Relating to the Territories of the United States (to 1873)* described the papers held by various Washington, DC, repositories that pertained to the territorial period. Lobbying by historians persuaded Congress to make these papers more readily available to the public and resulted in the passage of the Ralston Act of March 3, 1925 (43 Stat. 1104). The provisions of this act required the Secretary of State to have the important papers of the territories “collected, edited, copied, and suitably arranged for publication.” Publication began in 1934 with the first volume of the Territorial Papers of the United States. The printed volumes, compiled and edited first by Clarence Carter and then by John Bloom, were published from 1934–1975. The volumes, organized by territory, contain transcribed original documents from the territorial period (1787–1845). Over time, resource limitations allowed the effort to continue only as a microfilm project of selected documents from the remaining territories. Further resource limitations led to a decision to conclude the effort with a series of finding aids, *The Trans-Mississippi West, 1804–1912: A Guide to the Records of the Territorial Period*. Though these guides are finding aids, not records, they are of tremendous value to genealogists.

Genealogical Value. Significant kinship information can be discovered in these papers. Many of the records contain petitions and memorials that locate individuals in time and place like a census. Many of the records give valuable information concerning land transactions. Correspondence records may reveal many of the activities that occupied the settlers. Successive locations documented over time may reveal migration patterns. Many of the papers of the various governors record the appointments to positions in the militia and other functions such as postmasters. Judicial proceedings and military records are often found in these papers.

The Published Volumes. The State Department was responsible for implementing the provisions of the act until it was subsequently transferred to the Archivist of the United States in 1950. Titled *The Territorial Papers of the United States* and compiled and edited by Clarence Edwin Carter and then by John Bloom, it consists of 28 volumes as

© 2024, Richard G. Sayre, CG, CGL, FUGA

#NGS2024GEN



F203

Rick Sayre, CG, CGL, FUGA

Territorial Papers of the US (1787–1912) – a Treasure Often Overlooked

described below. The volumes have also been filmed as NARA Microfilm Publication M721, *The Territorial Papers of the United States, 1787–1845*. The records selected for inclusion came from the archives of the Departments of State, War, Treasury, and Interior. Records of the Post Office, Congress, and the Manuscripts Division of the Library of Congress are also included. The volumes are available online from FamilySearch and other digital providers (<https://www.familysearch.org/search/catalog/42234>).

- Vol. I, *The Territorial Papers of the United States, General*.
- Vols. II & III, *The Territory Northwest of the River Ohio, 1787–1803*.
- Vol. IV, *The Territory South of the River Ohio, 1790–1796*.
- Vols. V & VI, *The Territory of Mississippi, 1798–1817*.
- Vols. VII & VIII, *The Territory of Indiana, 1800–1816*.
- Vol. IX, *The Territory of Orleans, 1803–1812*.
- Vols. X – XII, *The Territory of Michigan, 1805–1837*.
- Vols. XIII – XV, *The Territory of Louisiana-Missouri, 1803–1821*.
- Vols. XVI & XVII, *The Territory of Illinois, 1809–1818*.
- Vol. XVIII, *The Territory of Alabama, 1817–1819*.
- Vols. XIX – XXI, *The Territory of Arkansas, 1819–1836*.
- Vols. XXII & XXIII, *The Territory of Florida, 1821–1828*.
- Vols. XXIV – XXVI, *The Territory of Florida, 1828–1845*.
- Vols. XXVII & XXVIII, *The Territory of Wisconsin, 1836–1848*.

The Filmed Records. As funds dwindled for the published volumes selected documents were published as microfilms either as an effort to supplement the published volumes or to extend the series to yet unpublished territories. These publications are online at FamilySearch and identified below:

- *The Territorial Papers of the United States: The Territory of Wisconsin, 1836–1848 (A Microfilm Supplement)*, M236, 122 rolls.
- *The Territorial Papers of the United States: Iowa, 1838–1846*, M325, 102 rolls.
- *The Territorial Papers of the United States: Oregon, 1848–1859*, (RG 64) M1049 12 rolls.
- *The Territorial Papers of the United States: Minnesota, 1849–1858*, (RG 64) M1050 19 rolls.

In addition to the films above, NARA published many other titles that relate to the territories. The Senate papers were published as *Territorial Papers of the U.S. Senate, 1789–1873* (RG 46), M200.

© 2024, Richard G. Sayre, CG, CGL, FUGA

#NGS2024GEN



F203

Rick Sayre, CG, CGL, FUGA

Territorial Papers of the US (1787–1912) – a Treasure Often Overlooked

The Trans-Mississippi West, 1804–1912. Once again faced with resource limitations NARA determined in 1989 that the most effective approach to provide the greatest access was to publish a series of finding aids. The area of coverage was also broadened to include the period from the Louisiana purchase in 1803 to the admission of the last contiguous state in 1912. The resulting guide consists of six volumes and is organized as described below:

- Part I: A Guide to Records of the Department of State for the Territorial Period
- Part II: A Guide to Records of the Department of Justice for the Territorial Period
- Part III: A Guide to Records of the Department of Agriculture for the Territorial Period
- Part IV: A Guide to Records of the Department of the Interior for the Territorial Period
 - Section 1, Records of the Offices of the Secretary of the Interior, and the Commissioner of Railroads
 - Section 2, Records of Select Agencies
 - Section 3: Records of the General Land Office

Arguably, Section 3 of Part IV, Records of the General Land Office (GLO), is the most significant publication of the series for genealogists. Not only are land records a major genealogical resource, but the records of the GLO have never been adequately described before this publication. Among many topics, this guide provides information to access to mining claims, private land claims, and the thousands of transactions found in land entry papers that record the transfer of public lands to individuals or other private ownership. Also, this guide describes the extensive correspondence records of the GLO. The other guides also describe records of interest to the family historian. Part I, Records of the State Department, includes the records and films described above that relate to the territories. Also of note are records relating to consular despatches and special agents. Records of the Justice Department in Part II includes information on the appointment of federal judges and marshals. Part III describes the records of the Department of Agriculture.

A New Subscription Resource. The commercial database offering by Readex, *Territorial Papers of the United States 1764–1953*, includes the printed volumes and images from many of the microfilms created by National Archives that relate to the territories. It can be found in large libraries that offer subscription databases.

© 2024, Richard G. Sayre, CG, CGL, FUGA

#NGS2024GEN



F203

Rick Sayre, CG, CGL, FUGA
Territorial Papers of the US (1787–1912) – a Treasure Often Overlooked

Related Records. The *American State Papers* (ASP) were created by Congress to provide selected documentation of Congressional sessions before 1817 and continuing until 1838. The collection comprises 38 volumes arranged in 10 classes. The ASP have been digitized and are online at FamilySearch and others digital providers. The ASP volumes were privately printed by two publishers, Duff Green (only the land volumes), and Gales and Seaton. GenealogyBank.com has scanned the ASP and it is fully searchable on that subscription website. Cross-references appear in the published *Territorial Papers of the United States* to the *American State Papers*.

Bibliography

Farrand, Max. *Legislation of Congress for the Government of the Organized Territories of the United States, 1789–1895*. Newark, NJ: William A. Barker, 1896

Hill, Edward E. *Guide to the Records in the National Archives of the United States Relating to American Indians*. Washington, DC: National Archives and Records Administration, 1981.

Ladd, Richard S. *Maps Showing Routes, Trails & Early Roads in the United States: An annotated List*. Washington: Library of Congress, 1962.

Naylor, Chris. "Those Early Americans: Public Lands and Claims in the *American State Papers, 1789–1837*." *Prologue* 37 (Summer 2005).

Paullin, Charles O. *Atlas of the Historical Geography of the United States*. Washington, DC: Carnegie Institution of Washington, 1932.

Schmeckabier, Lawrence F. and Roy B. Eastin. *Government Publications and Their Use*. 2d rev ed. Washington, D.C.: Brookings Institution, 1969. A general guide to government documents.

Schamel, Charles E. "Untapped Resources: Private Claims and Private Legislation in the Records of the U.S. Congress." *Prologue* 27 (Spring 1995).

Wheat, Carl I. *Mapping the Transmississippi West*. 5 vols. San Francisco: The Institute of Historical Cartography, 1957–1963. A monumental effort to compile an encyclopedia on mapping the west.

© 2024, Richard G. Sayre, CG, CGL, FUGA



F204

Katherine Schober
My Church Records Aren't Digitized: Now What?

GERMANOLOGY UNLOCKED

E-Mail: katherine_schober@germanologyunlocked.com
Facebook: <https://www.facebook.com/germanologyunlocked>
Website: <https://germanologyunlocked.com/>

1. Eliminate all online options for church records first.

- a. Archion.de
 - i. <https://www.archion.de/en/>
 - ii. Includes over 150,000 church books for Germany and former eastern provinces (East and West Prussia, Posen, Brandenburg, Pomerania, Silesia), and some Croatia, Serbia, Slovakia, Hungary, and Romania
 - iii. Mostly Protestant, but some Jewish, Catholic, Mennonite also included
 - iv. Subscription-based
 - v. Join newsletter to stay up-to-date on new church books added: <https://www.archion.de/en/discover-archion/news> (scroll down to “newsletter registration” on bottom of page)
- b. Matricula
 - i. <https://data.matricula-online.eu/en/>
 - ii. Includes books for Austria, Germany, Poland, Serbia, Slovenia, Luxembourg, Italy, Bosnia and Herzegovina
 - iii. Mostly Catholic, but some Protestant and Greek Orthodox
 - iv. Free to use
- c. FamilySearch: <https://www.familysearch.org/>
- d. Ancestry: <https://www.ancestry.com/>

2. How to Find Protestant Parishes in Germany

- a. *Map Guide to German Parish Registers* by Kevan M. Hansen
- b. Go to <https://www.ekd.de/en/Gemeindesuche-161.htm>
- c. Type in the name of your town in the *Ort* (town) search box.
- d. Click *Gemeinde suchen* (search parishes).
- e. If there are multiple parishes in that town, the website will provide you with the highest-ranking parish.
- f. Write your request to the e-mail address provided.

3. How to Find Catholic Parishes in Germany

- a. Go to <https://www.dbk.de/bistumskarte>
- b. Click *Inhalt anzeigen* (show content) to load the page.



F204

Katherine Schober
My Church Records Aren't Digitized: Now What?

- c. Type in your ancestor's town in the map search box on the upper right.
- d. Click the icon on the map; may need to zoom out to see all churches.
- e. Go to the website provided.
- f. Find the contact form (*Kontakt*) and write your request.
- g. Wikipedia List of Churches: https://de.wikipedia.org/wiki/Liste_r%C3%B6misch-katholischer_Kirchen_in_Deutschland

4. How to Find Protestant Parishes in Austria

- a. Go to <https://evang.at/kirche/ueberblick>
- b. Click your ancestor's state.
- c. Scroll to the bottom to find an e-mail address under the heading *Kontakt* (*contact*).
- d. Write your request to the e-mail address provided.

5. How to Find Catholic Parishes in Austria

- a. Go to <https://www.katholisch.at/dioezesen>
- b. Scroll down to *Detail-Infos* and click the diocese that pertains to your ancestor's state (listed in parentheses).
- c. Click *Diözesan-Website* on the right of the page to go to that specific diocese's website.
- d. Each website will have a slightly different setup; find *Kontakt* to see their contact information or scroll to the footer information at the bottom of the page.
- e. Write your request to the e-mail address provided.

6. How to Contact State Archives

- a. Google "name of region" + *Landesarchiv/Staatsarchiv* (state archive)
- b. Archive Portal (Germany): <https://www.archivportal-d.de/>
- c. Austrian State Archives:
<https://www.statearchives.gv.at/family-research/general-information.html>

7. How to Translate German Websites to English

- a. Google Chrome - right click
- b. Google Translate links

8. How to Write to the Church/Archive and Obtain Your Records

- a. FamilySearch German Letter Writing Guide:
https://www.familysearch.org/en/wiki/German_Letter_Writing_Guide
- b. Deepl.com: <https://www.deepl.com/translator>

You can do it!



F204

Katherine Schober
My Church Records Aren't Digitized: Now What?

Locating Church Records Vocabulary:

Places	
Archiv	Archive
Kirche	Church
Dekanat	Deanery
Diözese	Diocese
Gemeinde	Parish
Pfarre	Parish
Bistum	Bishopric
Books	
Kirchenbuch	Church Book
Gesamtkirchenbuch	Entire Church Book (Gesamt = Entire, Complete)
Mischbuch	Mixed Book (Multiple Types of Events)
Taufen	Baptisms
Taufbuch	Baptismal Register
Erstkommunion/Abendmahl	First Communion/Communion
Firmung/Konfirmation	Confirmation
Trauungen/Eheschliessungen/Heiraten	Marriages
Trauungsbuch	Marriage Register
Bestattungen/Beerdigungen	Burials
Sterben	Deaths
Sterbebuch/Sterbefälle	Death Register/Deaths
Familienbuch	Family Book
Zivilregister	Civil Register
Religions/Religious Groups	
evangelisch (ev.)	Protestant
Juden	Jews
katholisch (rk = Roman Catholic)	Catholic
Mennoniten	Mennonites

#NGS2024GEN



F204

Katherine Schober
My Church Records Aren't Digitized: Now What?

a	<i>a A</i>	j	<i>j J</i>	s	<i>s S P</i>
b	<i>b B</i>	k	<i>k K</i>	t	<i>t T</i>
c	<i>c C</i>	l	<i>l L</i>	u	<i>u U</i>
d	<i>d D</i>	m	<i>m M</i>	v	<i>v V</i>
e	<i>e E</i>	n	<i>n N</i>	w	<i>w W</i>
f	<i>f F</i>	o	<i>o O</i>	x	<i>x X</i>
g	<i>g G</i>	p	<i>p P</i>	y	<i>y Y</i>
h	<i>h H</i>	q	<i>q Q</i>	z	<i>z Z</i>
i	<i>i I</i>	r	<i>r R</i>	tz	<i>tz</i>

ü Uu ö Ou ü Uu
if il if pf p p

#NGS2024GEN



F301

Stephanie O'Connell, CG
Formerly Known As: Proving Identity with Indirect Evidence

Formerly Known As: Proving Identity With Indirect Evidence



Board for Certification of Genealogists®
Skillbuilding Lecture

Presented by Stephanie O'Connell, CG®
Family Discovered

stephanie@familydiscovered.com
www.familydiscovered.com

This session delves into the unique challenges in proving the relationships of Lorraine Odell. Her multiple marriages and name changes were further complicated by her daughter's acting aspirations and use of pseudonyms. Using cluster research, resolving conflicting evidence and indirect evidence was vital to unraveling their complicated identities.

Understanding Evidence

Evidence is drawn from information in sources and used to answer questions about identity, relationships, or events. Evidence categorization is not static but can evolve based on interpretation and application. A single piece of information can yield different types of genealogical evidence, depending on how it is analyzed and utilized in forming various conclusions. All types of evidence - direct, indirect, and negative - require other evidence items to answer a research question conclusively. Genealogy Standards (Standards 35, 36, 40 to 50) provide a framework for addressing the complexities of analyzing sources, information, and evidence in genealogical research.

Evidence Discrimination (Standard 42)

Genealogists approach their research by meticulously including all sources and pieces of information that appear relevant to their research question while excluding those that seem irrelevant. This thorough and selective method ensures that every piece of evidence that could provide insight or answers is considered. In contrast, unrelated or extraneous information is left out to maintain focus and clarity in the research process.

Indirect Evidence

Indirect evidence is like creating a recipe by tasting a finished dish. We don't have the original recipe (direct evidence), but we can reconstruct it by identifying individual

© Stephanie O'Connell, CG®, 2024

#NGS2024GEN



F301

Stephanie O'Connell, CG
Formerly Known As: Proving Identity with Indirect Evidence

ingredients (pieces of information). Similarly, indirect evidence results from analyzing and correctly interpreting information when no single source provides a direct answer. Indirect evidence challenges us to consider the possibilities, notice details, and consider what they might mean. We must look for what the combined information might suggest.

Indirect evidence often provides a wider range of information, giving a fuller picture of an ancestor's life and circumstances. It can reveal connections and patterns that direct evidence might overlook.

Cluster Research

Cluster Research is a powerful strategy when direct evidence for answering a research question about an individual is insufficient. This method involves delving into the research subject's broader community, paying attention to patterns and connections.

Case Study: Formerly Known As

This case focuses on Lorraine Odell, a woman who lived in California from 1910 through 1985. While the original research question began with a family member, Lorraine's identity and relationships expanded the research trajectory. The complexity lies in her multiple marriages, name changes (pseudonyms), and that of her children.

Effective Research Question (Standard 10)

Begin with a clearly described unique person and specification of unknown information the research is to discover.

Q: *Who were the children of Lorraine Odell, who was born about 1908 in California, and died 24 March 1960 in Hollywood, Los Angeles County, California?*

Analysis of sources (vital records, censuses, newspapers) resulted in a variety of evidence.

"History is tangled, messy, contradictory. But is where we are." - Eamon Duffy

Understanding The Law (Context)

In the United States, state laws regulate name changes. States (except Louisiana) follow common law and usually require a court order. However, informal methods of legal name change exist (e.g., assumed name, usage method, preferred name). In California, the "usage method" is sufficient to change a name, and not all jurisdictions require that the new name be used exclusively.

© Stephanie O'Connell, CG®, 2024



F301

Stephanie O'Connell, CG
Formerly Known As: Proving Identity with Indirect Evidence

Testing: Analysis and Correlation

Adhering to the Genealogical Proof Standard (GPS) ensures that our research meets a high standard of accuracy. Correlating and analyzing our sources, information, and evidence ensures that our conclusions result from a comprehensive and scrupulous examination of all available data.

Tools for testing include:

- Tables help us compare facts that agree and disagree with one another.
- Timelines aid in identifying life events and patterns. They can also identify gaps in our research.
- Bulleted lists are a great way to present short facts and dates.
- Diagrams and maps provide visual aid and clarity.
- Research logs that include details we might have initially deemed insignificant but when reviewed with additional information may provide indirect evidence.
- Citations allow us to analyze the type of source and consider if the information is reliable or biased.

Resolving Evidence Inconsistencies (Standard 48)

Identifying a conflict is the starting point. We must gather supporting evidence items for each conflicting piece of evidence to corroborate each side of the conflict. We evaluate the strengths and weaknesses of supporting information and articulate a defensible rationale for setting aside certain items. Documenting this allows for transparency in the decision-making process and serves as a reference for future researchers who might revisit the conflict with new evidence.

Written Conclusion

Proving relationships within the GPS requires researchers to document the information, analysis, and reasoning. Of the three forms of proof, proof arguments provide detailed and careful explanations; they are the most effective way to show the analysis and correlation of complicated evidence. They may stand alone or be a part of a case study, court record, client report, or personal files.

© Stephanie O'Connell, CG®, 2024

#NGS2024GEN



F301

Stephanie O'Connell, CG
Formerly Known As: Proving Identity with Indirect Evidence

Resource Material and Further Learning

Board for Certification of Genealogists. *Genealogy Standards*. Nashville, Tenn.: Ancestry.com, 2014.

Black, Henry Campbell. *Black's Law Dictionary: Definitions of Terms and Phrases of American and English Jurisprudence, Ancient and Modern*, fourth edition, revised. St. Paul, Minnesota: West Publishing, 1968.

Henningfield, Melinda. "Investigate the Neighborhood to Advance Your Research." 8 Oct. 2021. *Legacy Family Tree Webinars*. <https://familytreewebinars.com/>.

Jones, Thomas W. *Mastering Genealogical Proof*. Arlington, Va.: National Genealogical Society, 2013. [A textbook in paperback and Kindle e-book formats with exercises and answers; covers genealogical research planning and execution, documentation, analysis, and correlation, resolving conflicting evidence, and writing proof statements, summaries, and arguments].

"QuickLesson 13: Classes of Evidence—Direct, Indirect & Negative." *Evidence Explained: Historical Analysis, Citation & Source Usage*. <https://www.evidenceexplained.com/content/quicklesson-13-classes-evidence—direct-indirect-negative> : 2018.

McGhie, Angela Packer. "Analyzing Documents Sparks Ideas for Further Research," *Legacy Family Tree Webinars*, July 2017. <https://familytreewebinars.com/>.

"Skillbuilding: Proof Arguments." BCG website, <https://bcgcertification.org/skillbuilding-proof-arguments/>.

Smith, Robyn. "Cluster Research: Using Groups of People to Find Your People." 23 Sep. 2021. *Legacy Family Tree Webinars*. <https://familytreewebinars.com/>.

#NGS2024GEN

© Stephanie O'Connell, CG®, 2024



F302

Julia A. Anderson, MA, AG
In Their Own Words: Women and the War of 1812

In Their Own Words: Women and the War of 1812

Julia A. Anderson, MA, AG[®], AGL[™]

Anderson Genealogical Research, LLC | PO Box 903; Orem, UT 84059-0903
julia.a.anderson@outlook.com

The War of 1812 changed American lives for generations. Women and families were especially affected. Most research on women in the War of 1812 has focused on well-educated, upper-class women or wives of officers who were the center of their social circles and kept diaries or wrote memoirs. Unfortunately, these sources do not give us the full picture because most nineteenth-century women in the United States were largely uneducated and lived in rural areas away from centers of “society.” War of 1812 pension files give us glimpses into the lives of the every-day women and families in America, specifically those who were hardest hit by the war and its aftermath.

OBJECTIVES

- Review the history and background of the War of 1812.
- Give a brief synopsis of the history of military pensions, laws governing their distribution, and their genealogical value.
- Explain the situation of women and families during the early nineteenth century and discuss the effects of the war on society in general and on women and families in particular.
- Illustrate accounts of life during and after the War taken from information in military pension files.

HISTORY AND BACKGROUND OF THE WAR OF 1812

The War of 1812 grew out of an ongoing conflict between Great Britain and France, indignation at American sailors being seized and impressed into the Royal British Navy, and a desire to acquire more real estate for the United States, specifically, what is now Florida and eastern Canada. In 1807, American President Thomas Jefferson tried to avoid war by creating an embargo which stopped all U.S. trade with foreign nations. Unfortunately, this had disastrous economic consequences. It is estimated that over 150,000 American men—especially sailors, merchants, and laborers—lost their jobs due to the embargo. The restriction was soon reversed, but economic turmoil persisted.

© 2024 by Anderson Genealogical Research, LLC. All rights reserved.

#NGS2024GEN



F302

Julia A. Anderson, MA, AG
In Their Own Words: Women and the War of 1812

British war practices drew the ire of many Americans as French Napoleon courted President James Madison with promises of compliance. A younger generation that had not experienced the ravages of the Revolution felt called to arms. This calling grew after the Battle of Tippecanoe in 1811, where General William Henry Harrison defeated Native American leader Tecumseh, and the British in North America (now Canada) were blamed for causing the “Indian uprising” that led to the conflict.

The Presidential Election of 1812 showed that the south and west voted for Madison, who had declared and supported the war, while the north and east voted for De Witt Clinton, who was against the conflict. Massachusetts and Connecticut refused to supply militia when called upon to defend the country. Some New Englanders even spoke of secession from the Union to join the British and put a stop to the war.

War brought great hardship on all Americans. Prices for necessities rose, while farmers and merchants were unable to sell their wares for profit. The federal government headed toward bankruptcy. On the English side, years of warfare with France had exhausted the British and reduced them to poverty. Finally, on Christmas Eve in 1814, the *Treaty of Ghent* was signed, declaring “peace without victory.”

After the war, Americans’ focus turned to settling the west, industrialism, and national pride. The “Era of Good Feeling” served to reunify a divided country for a short time.

Reference: William A. Hamm, *The American People* (Boston: D.C. Heath and Company, 1938): 259-70.

UNITED STATES MILITARY PENSIONS

A pension is a sum of money paid monthly or yearly as a retirement benefit or supplemental income. Military pensions were paid to veterans or their family members by the government. There were three basic categories: invalid or disability pensions, service pensions, and widow’s pensions.

Shortly after signing the *Declaration of Independence*, one of the first acts of legislation passed by the Continental Congress was a national pension law which provided half pay for life or during disability for every officer, soldier, or sailor losing a limb or being too disabled to earn a living. Partial pensions were given for partial disability. Over the next century, pension laws continued to evolve, and every time Congress passed a new act, more people qualified and applied for pensions.

© 2024 by Anderson Genealogical Research, LLC. All rights reserved.

#NGS2024GEN



F302

Julia A. Anderson, MA, AG
In Their Own Words: Women and the War of 1812

The *War Act of 1818* provided relief for Revolutionary War veterans who were not disabled but had financial need. In 1832, a new law offered full pay for life for officers and enlisted men who served more than two years, and partial pay for those who served between six months and two years.

War of 1812 Pension Files

- Approximately 180,000 pension applications filed
 - Applicants were required to provide the government with proof of eligibility. May include original records such as pages torn from family Bibles, marriage certificates, photographs, military records, and more.
- For pensions granted before 1871:
 - Veteran or widow must not be capable of earning a living
- Pension Act of 14 February 1871:
 - Individual must have served at least 60 days
 - Must have been honorably discharged
 - Included widows if they were married to the soldier before 17 February 1815 (date of ratification of peace treaty and official end of the war)
- Pension Act of 1878:
 - Served at least 14 days
 - Included veterans, widows, and children
- Documents found in War of 1812 pension files:

<ul style="list-style-type: none">▪ Pages from family Bibles▪ Marriage certificates▪ Photographs▪ Letters▪ Military discharge papers	<ul style="list-style-type: none">▪ Church records▪ Land records▪ Wills▪ Affidavits from family, friends, neighbors, and other associates
--	--
- Genealogical evidence found in War of 1812 pension documents:

<ul style="list-style-type: none">▪ Name▪ Age▪ Residence▪ Date and place of birth▪ Military service▪ Family information▪ Personal history	<ul style="list-style-type: none">▪ Wife's maiden name▪ Date and place of marriage▪ Name of former wife, if any, and marriage information▪ Names and birthdates of living children
---	---

© 2024 by Anderson Genealogical Research, LLC. All rights reserved.

#NGS2024GEN



F302

Julia A. Anderson, MA, AG
In Their Own Words: Women and the War of 1812

Resources

- FamilySearch Blog – “How to Use War of 1812 Pension Files”
<https://www.familysearch.org/blog/en/war-1812-pension-files/>
- RootsTech Handout – “War of 1812 Pension Files”
https://static.coreapps.net/rootstech2018/handouts/a99747d94a5313b56b0efb8b4546b63d_1.pdf
- National Archives Catalog – War of 1812 Pension and Bounty Land Warrant Application Files, ca.1871-ca.1900
<https://catalog.archives.gov/id/564415>
- National Archives – Military Records: War of 1812
<https://www.archives.gov/research/military/war-of-1812>
- FamilySearch Wiki – “United States in the War of 1812”
https://www.familysearch.org/wiki/en/United_States_in_the_War_of_1812

THE WAR AND NINETEENTH-CENTURY WOMEN AND FAMILIES

Prior to the War of 1812, American society was largely patriarchal, with men at the head of the government, society, and the home. Some historians argue that the war propelled women to the forefront as they stepped into previously male-dominated fields. While this is true, societal changes based on these new roles were mostly confined to the wealthy, elite, educated American women, especially those who lived in cities and were part of the ruling circles (wives of government officials). Uneducated women who lived subsistence lives in rural areas carried on much the same after the war as they did prior to it—with the exception of the loss of their husbands, sons, and fathers, and often their livelihoods.

Although they were essentially removed from the political, economic, and social arenas of change during and following the War of 1812, rural, uneducated, poor women were impacted by the war for generations. These women left relatively few documents behind for study; however, War of 1812 pension application files between 1815 and 1880 preserve a few of their voices and document a small part of their experiences that demonstrate the effects of the war on their lives and livelihoods. By comparing and contrasting the experiences of women impacted by the War of 1812 as evidenced in these pension applications, it becomes evident that the effects of the war were similar for women of all backgrounds, races, education, and geographic regions.

© 2024 by Anderson Genealogical Research, LLC. All rights reserved.



F303

Diana Elder, AG

illuminating Ancestors' Lives in Small Bites through Focused Themes and Engaging Narratives

illuminating Ancestors' Lives in Small Bites through Focused Themes and Engaging Narratives

Diana Elder, AG[®], AGL[™]

Family Locket Genealogists



FamilyLocket.com

Diana@FamilyLocket.com

Let's explore our ancestors' lives by crafting compelling stories that capture their essence! We can use themed sketches to visually bring their experiences to life, creating timelines with key events and milestones. Including citations adds credibility and depth, ensuring accuracy. By weaving it all together with engaging storytelling, we'll create an informative and captivating family history, a treasure for generations!

The Importance of Writing Family History

Writing about your family history is essential for preserving our family stories and understanding our origins. Exploring our ancestors' lives allows us to appreciate how our family has overcome challenges and celebrated successes over time. Additionally, writing about our family history can uncover missing pieces or inconsistencies, leading to more discoveries and a clearer picture of our family's story. Ultimately, it's a way to honor the past, connect with our roots, and shape our future.

Explanation of the "Small Bites" Approach

Taking a step-by-step approach to writing your family history makes it easier to tackle the immense task of documenting your family's story. Focusing on specific topics or events allows you to dig deep into the details that bring your ancestors' lives to life. These smaller pieces collectively paint a complete picture of your family's history, capturing its richness and complexity. This approach makes writing easier and ensures you do justice to your family's story.

©Diana Elder AG[®], AGL[™]. All rights reserved. 2024

#NGS2024GEN



F303

Diana Elder, AG

Illuminating Ancestors' Lives in Small Bites through Focused Themes and Engaging Narratives

Getting Started

- Setting Goals for Sharing Family History
 - Define the purpose of your research and writing: i.e., preserving family stories for future generations, connecting with living relatives, or contributing to a broader understanding of your ancestors.
 - Stay focused and motivated throughout the process.
- Determine your Audience
 - Tailor your storytelling approach to suit different family members' or audiences' interests and preferences.
 - Consider using different formats (written stories, oral histories, multimedia presentations, blog posts, podcasts, etc.)
- Identify Key Stories and Events
 - Think about the important events in your family's past that have helped shape who you are and your family's story.
 - Consider world events and how they may have affected your ancestors' emigration, migration, involvement in the community, etc.
 - When exploring your family stories, being a bit of a detective is essential.
 - Sort out the facts from any extra details or mistakes that might have crept in over time.
- Adding Context and Historical Background
 - Give your readers some background to help them understand why the events in your family's story are important.
 - Look into the history and culture of the time, and include interesting details to enrich your story.
- Set the Foundation for the Story
 - Do additional research to locate missing records following the research process.
 - Choose a focus for the story - one aspect of the ancestor's life, such as education or emigration, or an engaging anecdote.
 - Create a timeline for the ancestor. Analyze the known family stories, gather all the records, and look for clues to research further.
 - Write source citations for all the records and stories.
 - Learn about the culture, history, and laws of the time. Find additional record collections to search and other associates or relatives that could be researched.

©Diana Elder AG®, AGL™. All rights reserved. 2024

#NGS2024GEN



F303

Diana Elder, AG

Illuminating Ancestors' Lives in Small Bites through Focused Themes and Engaging Narratives

- Create a research plan for adding new information to the ancestor's timeline.
- Perform the research, tracking the searches in a research log.
- Begin writing the story, citing each fact.

Tools and Techniques

- Digital Tools for Organizing and Sharing
 - Explore genealogy software and online trees such as Ancestry.com or the collaborative tree at FamilySearch.org to organize your family tree.
 - Use a spreadsheet or program such as Airtable to create a detailed timeline for your ancestors' lives and track new research. See Nicole Dyer's Airtable research log templates:
<https://www.airtable.com/universe/creator/usrsBSDhwHyLNnP4O/nicole-dyer>
- Consider incorporating visual elements such as maps, charts, or videos to complement your written narrative and provide additional context for your family history.
 - Use family photos, letters, documents, and other visual materials to illustrate and bring your narrative to life.
 - Add captions and explanations to any pictures or visuals you include in your family history to help tell the story and make connections to what you've written.

Crafting Your Narrative

- Consider these questions when writing about a complicated family story
 - What is your responsibility as a family historian?
 - You make or break a reputation; you decide the truth; you deal with the repercussions; you decide what stays in the closet.
 - What are your options?
 - You can leave the skeleton in the closet and say nothing, or you can tell everything you've discovered. Prudently tell the truth or a version of it.
- What is your purpose?
 - If you're telling the story of a family, you may have to explain why a situation occurred. Decide if there is a purpose to putting something in a history.
 - Could the story strengthen family members dealing with the same challenges as an ancestor?
- Who is your audience?

©Diana Elder AG®, AGL™. All rights reserved. 2024



F303

Diana Elder, AG

Illuminating Ancestors' Lives in Small Bites through Focused Themes and Engaging Narratives

- Does the family already know the story? Are the readers thick-skinned? Will the story be too upsetting to some? Some stories may need more time to pass before they are fully revealed.
- What were the motives?
 - Ask why an event occurred or what brought your ancestor to a specific action.
- What is the truth?
 - Be sure anything you reveal is supported by sources more than gossip or rumors. Carefully evaluate each source, the information it holds, and the evidence it provides.

Additional Resources

Crow, Amy Johnson. "52 Ancestors in 52 Weeks." Posted 2024. *Amy Johnson Crow*.

<https://www.amyjohnsoncrow.com/52ancestors52weeks/>

Elder, Diana. "Do You Have a Skeleton in your Family History Closet?" Posted 30 October 2015.

Family Locket. <https://familylocket.com/do-you-have-a-skeleton-in-your-family-history-closet/>.

—— "Six Tips for Excellent Writing." Posted 22 July 2022. *Family Locket*.

<https://familylocket.com/six-tips-for-excellent-writing/>.

—— The Adventures of Cowboy Bob series. Posted 2016, 2017. *Family Locket*.

<https://familylocket.com/?s=adventures+of+cowboy+bob>

—— Track Your Family with a Timeline." Posted 9 June 2016. *Family Locket*.

<https://familylocket.com/track-your-family-with-a-timeline/>.

—— "Tracking Research Projects in Airtable." Posted 17 September 2022. *Family Locket*.

<https://familylocket.com/tracking-research-projects-in-airtable/>

Gendler, Annette. *How to Write Compelling Stories from Family History*. Annette Gendler, 2019.

Thurston, Dawn and Morris. *Breathe Life into Your Life Story: How to Write a Story People Will Want to Read*. Signature Books, 2007.

Thurston, Morris. *Memoir Mentor* <http://www.memoirmentor.com/index.htm>.

©Diana Elder AG®, AGL™. All rights reserved. 2024



F304

Stewart Blandón Traiman
LGBTQ+ Family History

LGBTQ+ Family History

Stewart Blandón Traiman

A Guide to LGBTQ Genealogy

- Look at family history through a new lens – a rainbow prism.
- We all have LGBTQ people in our family’s history. Adding their stories will enrich your narrative.
- Clues to sexuality may be found in:
 - Photographs
 - Census
 - Newspapers
 - Police records
 - Obituaries or tombstones
 - Military discharge records
 - Phone books (Gay neighborhoods)
 - Professions
 - Domestic Partner Registries and recent Marriage records
 - LGBTQ Archives around the world
- Once all documentation has been gathered, put it into the context of LGBTQ History.
- Write ancestor stories openly without judgments, being aware of personal filters or bias.
- Sexuality is inherent to family history and being aware of non-heterosexual ancestors is no different.



“Bias, ego, ideology, patronage, prejudice, pride, or shame cannot shape our decisions as we appraise our evidence. To do so is to warp reality and deny ourselves the understanding of the past that is, after all, the reason for our labor.”
-- Elizabeth Shown Mills

LGBTQ History (Brief)

- Attitudes and tolerance changed toward same-sex relationships throughout history. The terms “Romantic Friendships” or “Boston marriage” were used in Europe and the early USA. Extreme negative attitudes against homosexuals arose in the U.S.A. in the 1930s.
- Partner was a term used in 20th-century censuses. It may be a clue for finding same-sex couples, but it was not exclusively used for that purpose.
- The Stonewall Riots in Greenwich Village, NY on 28 June 1969 marked the beginning of the *modern* LGBTQ rights movement.
- There is a long history of expulsion and prosecution of LGBTQ people in the U.S. Military. Currently, LGBTQ people can serve and be open about their sexuality.
- Less than honorable military discharged personnel were concentrated in certain cities which gave rise to gay neighborhoods.
- Entrepreneurial professions offered more protection should someone’s sexuality become public, offering mobility to start over in new locations. Those who worked for schools or government



© Copyright 2024– Stewart Traiman
SixGen.org

#NGS2024GEN



F304

Stewart Blandón Trainman
LGBTQ+ Family History

agencies were at significant risk of losing their livelihood. LGBTQ job protection only began in June 2020 by the US Supreme Court decision.

- Domestic Partnership began as an idea in 1979. A grassroots group in Berkeley brought this concept to the Berkeley Education Board in 1984. This idea spread throughout the world allowing for the acceptance of Same-Sex Marriage.
- Homosexuality was decriminalized in the entire U.S.A. in 2003 with the Supreme Court case of Lawrence vs. Texas. Some parts of the world still punish homosexual acts with death.
- Same-sex marriage was Federally recognized in the U.S.A. in 2013 with the Supreme Court case of U.S. vs. Windsor. Marriage is available in most of the western hemisphere.

Online Resources

- Jeffrey Gent, "Homo History" - www.homohistory.com
- One-Step Webpages by Stephen P. Morse - stevemorse.org/census/ancestry.html
- List of LGBT Periodicals on Wikipedia - en.wikipedia.org/wiki/List_of_LGBT_periodicals
- B.A.R. Online Searchable Obituary Database - obit.glbthistory.org/olo/index.jsp
- OskiCat UC Berkeley Library Catalog for the San Francisco Bay Area Gay and Lesbian Serial Collection - digitalassets.lib.berkeley.edu/sfbagals/
- Online Archive of California – Finding Aid to the San Francisco Police Department Records, 1870-1983 - pdf.oac.cdlib.org/pdf/csf/sfpl/sfpl.pdf
- Lloyd Sealy Library – Collection: Criminal Trial Transcripts of New York County Collections (1883-1927) - dc.lib.jjay.cuny.edu/index.php/Detail/Collection/Show/collection_id/23
- NARA Military Service Records - www.archives.gov/veterans/military-service-records
- NARA Requesting Copies of Older Military Service Records - www.archives.gov/veterans/military-service-records/pre-ww-1-records
- NARA Location of Service Records - www.archives.gov/veterans/military-service-records/locations
- Documentary - *Citizen Change: Taking the first steps to marriage equality* - citizenchange.weebly.com/
- State of California Domestic Partnership Registry – www.sos.ca.gov/registries/domestic-partners-registry/forms-fees/
- City of San Francisco Domestic Partnership Registry - sfgov.org/countyclerk/declaration-domestic-partnership
- UK Civil Partnership records from the General Records Office - www.gov.uk/order-copy-birth-death-marriage-certificate
- GALE – Archives of Sexuality and Gender - www.gale.com/primary-sources/archives-of-sexuality-and-gender
- Lavender Legacies Guide - www2.archivists.org/groups/diverse-sexuality-and-gender-section/lavender-legacies-guide
- Discovering LGBT History: Records in the National Archives Collection - lgbtqarchives.tumblr.com/
- Tamara Jones GEDCOM Blog - www.tamurajones.net/AGentleIntroductionToGEDCOM.xhtml
- GEDCOM.org
- Many LGBTQ Archives – domestic and international



© Copyright 2024– Stewart Trainman
SixGen.org



F304

Stewart Blandón Trainman
LGBTQ+ Family History

Bibliography

- Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace* (Baltimore, Maryland: Genealogical Publishing Company, 2017), Third Edition, Revised. The opening paragraph, page 15.
- Thomas MacEntee, "Hiding Out in the Open: Researching LGBT Ancestors," *GeneaBloggers*, 10 October 2014 (URL Removed: accessed June 2017).
- John D'Emilio, *Sexual Politics, Sexual Communities: The Making of a Homosexual Minority in the United States, 1940-1970* (Chicago, Ill.: The University of Chicago Press, 1983).
- Maria Popova, "Willa Cather's Only Surviving Letter to her Partner, Edith Lewis," *BrainPickings*, (www.brainpickings.org/2013/04/17/willa-cather-letters/: accessed 2018).
- "Stonewall Riots," *Wikipedia*, (en.wikipedia.org/wiki/Stonewall_riots accessed Feb 2018).
- Paul Lockhart, *The Drillmaster of Valley Forge: The Baron de Steuben and the Making of the American Army* (New York: Harper Collins, 2008), page 203.
- Allan Bérubé, *Coming Out Under Fire: The History of Gay Men and Women in World War Two* (New York: The Free Press, 1990), p 139.
- U.S. Naval Institute, *Key Dates in U.S. Policy on Gay Men and Women in Military Service* (www.usni.org/news-and-features/dont-ask-dont-tell/timeline: accessed February 2018).
- "Sexual orientation in the United States military," *Wikipedia*, (en.wikipedia.org/wiki/Sexual_orientation_in_the_United_States_military: accessed 2018).
- "Transgender personnel in the United States military," *Wikipedia*, (en.wikipedia.org/wiki/Transgender_personnel_in_the_United_States_military: accessed 2018).
- Jean R. Freedman, "Albert Cashier's Secret," *The New York Times*, 28 January 2014; The Opinion Pages (opinionator.blogs.nytimes.com/2014/01/28/albert-cashiers-secret/: accessed 2018).
- "Gay Village," *Wikipedia*, (en.wikipedia.org/wiki/Gay_village: accessed 2017).
- James Chambers, Director, *Citizen Change: Taking the first steps to marriage equality*, DVD (Oakland, Ca: Partners Productions, 2012).
- GayGuide UG, *Spartacus: International Gay Guide* (spartacus.gayguide.travel/: accessed February 2018).
- Nolo, *Domestic Partnership Benefits* (www.nolo.com/legal-encyclopedia/domestic-partnership-benefits-29916.html: accessed March 2018), A Brief History of Domestic Partnership.
- Leland Trainman, "A Brief History of Domestic Partnership," *The Gay & Lesbian Review*, July 1, 2008; (www.glreview.org/article-635/: accessed 2017).
- "World marriage-equality laws.svg" Uploaded 7 Nov 2012, *Wikipedia Commons* (commons.wikimedia.org/wiki/File:World_marriage-equality_laws.svg : accessed 9 Aug 2020).
- Rachel Hope Cleves, *Charity, and Sylvia: A Same-Sex Marriage in Early America* (New York: Oxford University Press, 2014).
- Lizzie Ehrenhalt, *Precious and Adored: The Love Letters of Rose Cleveland and Evangeline Simpson Whipple, 1890-1918* (Minnesota Historical Society Press, 2019).
- "LGBT History," *Wikipedia*, (en.wikipedia.org/wiki/LGBT_history: accessed 2017), Decriminalization of homosexuality in the US (1961-2011).

© Copyright 2024- Stewart Trainman
SixGen.org



F304

Stewart Blandón Trainan
LGBTQ+ Family History

#NGS2024GEN

- Peter Tatchell, "Magnus Hirschfeld 1868-1935: German LGBT pioneer," *Peter Tatchell Foundation: Speaking out for Human Rights*, 21 February 2018 (www.petertatchellfoundation.org/magnus-hirschfeld-1868-1935-german-lgbt-pioneer/; accessed February 2018).
- "Comparison of Genealogy Software," *Wikipedia*, (en.wikipedia.org/wiki/Comparison_of_genealogy_software#Genealogical_features; accessed 2017), Genealogical Features.
- "Three Parent Birth Certificates: What Are They?," *Simply Certificate* ([URL removed](#); accessed March 2018).
- Jennifer Peltz, "Courts and 'tri-parenting': A state-by-state look," *Boston.com*, 18 June 2017, (www.boston.com/news/national-news/2017/06/18/courts-and-tri-parenting-a-state-by-state-look; accessed March 2018).
- Rich Vaughn, "New CA Birth Certificate Law Allows LGBT Parents to Identify as Mother, Father, Parent," *International Fertility Law Group*, (www.iflg.net/new-ca-birth-certificate-law-allows-lgbt-parents-to-identify-as-mother-father-parent/; accessed March 2018).
- Mary Emily O'Hara, "Oregon Becomes First State to Add Third Gender to Driver's Licenses," *NBC News*, (www.nbcnews.com/feature/nbc-out/oregon-becomes-first-state-add-third-gender-driver-s-licenses-n772891; accessed March 2018).
- Thomas MacEntee, "Gender Selection and the Impact on Future Genealogy Research," *Abundant Genealogy*, 7 July 2017 (URL removed; accessed August 2017).
- "Intersex Human Rights" *Wikipedia*, (en.wikipedia.org/wiki/Intersex_human_rights; accessed May 2018).
- Andrew Solomon, "How Polyamorists and Polygamists are Challenging Family Norms," *The New Yorker*, 22 March 2021; (www.newyorker.com/magazine/2021/03/22/how-polyamorists-and-polygamists-are-challenging-family-norms; accessed 1 April 2021).

Linked Archive	Locations
Heakin Museum and Arizona LGBTQ+ Archive	Tucson
Lambda Archives of San Diego	San Diego
GLBT Historical Society (Archive & Museum)	San Francisco
ONE Archives at the USC Libraries	So. Cal
Mazer Lesbian Archives	West Hollywood
Stonewall National Museum & Archives	Fort Lauderdale
Gerber/Hart Library and Archives	Chicago
Leather Archives and Museum	Chicago
Indy Pride - Chris Gonzalez Library and Archives	Indianapolis
Jean-Nickolaus Tretter Collection in Gay, Lesbian, Bisexual and Transgender Studies	Minneapolis
St. Louis LGBT History Project	St. Louis
Lesbian Herstory Archives	NYC
Leslie-Lohman Museum of Gay and Lesbian Art	NYC
The LGBT Community Center National History Archive	NYC
The Dallas Way	Dallas
Gulf Coast Archive and Museum	Houston
Houston Arch Wiki	Houston
Transgender Foundation of America (TFA)	Houston



© Copyright 2024– Stewart Trainan
SixGen.org



F305

John Boeren and others
Becoming a Professional Genealogist

Becoming A Professional Genealogist

Presented by the Association of Professional Genealogists

Becoming A Professional Genealogist

Association of Professional Genealogists

www.apgen.org

APG is the world's largest association for professional genealogists, representing more than 2,000 members in forty countries. We provide education, advocacy, best practices, and a professional community to our members. We also seek to protect the interests of clients who engage the services of professional genealogists. Learn more at www.apgen.org.

Note: we may have transitioned to our new website since the syllabus was shared with NGS. Use the main APG link above if the more specific links below have been impacted.

Our speakers, in order of appearance: John Boeren, J. Mark Lowe, Jenny Irwin, Amanda Perrine, Annette Burke Lyttle, Paul Woodbury, Grant Din, and Jen Shaffer.

Who becomes a professional genealogist?

Professional genealogists come from a wide variety of backgrounds and experiences. They often use all their experience to assist in research projects. Therefore, a professional genealogist's background may be as varied as their potential work projects. For a small percentage, it may be their first career. Many have experience in another field, before coming to genealogy as a second career or a "side gig." Some helpful background experiences include being a schoolteacher, farmer, college student, or someone who enjoys sharing family stories.

Professional genealogists are researchers, lecturers, and writers. Working in this field is interesting and will encourage gaining new knowledge. Opportunities are diverse and may include historical research, analysis, librarianship, presentations, teaching, working at an archive, house & land history, and exhibit development. Our field continues to grow and expand as we address new areas of interest and locations.

Do I have to be certified or accredited to be considered a professional?

Earning a credential such as certification or accreditation is not a requirement to be considered a professional genealogist. However, the process of preparing for certification and/or accreditation enhances the professional's knowledge and provides experience that makes one a stronger, more skilled genealogist! Professional development, whether through the process of earning a credential or through advanced study, should be a part of every professional genealogist's education plan.

©2024, Association of Professional Genealogists

#NGS2024GEN



F305

John Boeren and others
Becoming a Professional Genealogist

Becoming A Professional Genealogist

Presented by the Association of Professional Genealogists

Many genealogists operate successful businesses without holding a credential. Such genealogists have a strong background in genealogical methodologies, familiarity with certain geographical areas, and an understanding of genealogical standards. They also adhere to a professional code of ethics.

While it isn't necessary for all genealogical roles, certification or accreditation is helpful or even compulsory for some specializations. For example, credentialing may be required by the court for forensic genealogists who testify as expert witnesses in estate cases. Forensic genealogists working on repatriation cases for the U.S. military must be credentialed or must work under the supervision of someone who is credentialed.

Credentialing Organizations

Two credentialing bodies in the United States are (1) the Board for Certification of Genealogists (BCG), which governs the awarding of the Certified Genealogist® credential, and (2) the International Commission for the Accreditation of Professional Genealogists (ICAPGen), which governs the awarding of the Accredited Genealogist® credential. (See <https://bcgcertification.org/> and <https://www.icapgen.org/>.) There are many other credentialing organizations outside the U.S., including the Register of Qualified Genealogists, in the United Kingdom, which awards the Qualified Genealogist (QG) credential.

Degree and Certificate Programs

There are genealogy degree and certificate programs available within and outside the United States. Examples include:

- Brigham Young University's Bachelor's degree in Family History
<https://history.byu.edu/family-history>
- The University of Strathclyde's Institute for Genealogical Studies degree programs
<https://www.strath.ac.uk/studywithus/centreforlifelonglearning/genealogy/>
- The National Genealogical Society's Advanced Skills in Genealogy certificate course
<https://www.ngsgenealogy.org/advskills/>
- Boston University's Certificate in Genealogical Research course
<https://genealogyonline.bu.edu/certificate>
- Certificate programs through the International Institute of Genealogical Studies
<https://genealogicalstudies.com/>

Examples of specialized certificate programs include the University of New Haven's Forensic Investigative Genetic Genealogy graduate certificate program (<https://www.newhaven.edu/lee-college/graduate-programs/certificates/forensic-genetic-genealogy/index.php>) and the Investigative Genetic Genealogy Center at Ramapo College's certificate program (<https://www.ramapo.edu/igg/>).

©2024, Association of Professional Genealogists



F305

John Boeren and others
Becoming a Professional Genealogist

Becoming A Professional Genealogist

Presented by the Association of Professional Genealogists

Genealogical Institutes

Genealogical institutes offer the opportunity for focused education on specific methodologies or skills. Some examples in the United States include:

- Salt Lake Institute of Genealogy (<https://slig.ugagenealogy.org/index.php>)
- GRIP Genealogy Institute (<https://grip.ngsgenealogy.org/>)
- Institute of Genealogy and Historical Research (<https://ighr.gagensociety.org/>)
- Genealogical Institute on Federal Records/Gen-Fed (<https://www.gen-fed.org/>)
- Midwest African American Genealogy Institute (<https://www.maagiinstitute.org/>)

How do I prepare to become a professional?

Part of establishing your genealogy business will be determining your area of focus. Will it be a specific geography or ethnicity? Will you only offer specific services, such as interviewing families and creating oral histories or preserving and organizing family photos?

Some key considerations as you prepare yourself to be a professional genealogist:

- Understand and use a wide variety of records in your area of focus. Get experience in archives, courthouses, and other repositories representing unique record sets.
- Study the Genealogical Proof Standard (<https://bcgcertification.org/ethics-standards/>) and know how to apply it to your work.
- Learn the history associated with your chosen specialty.
- If you are working with DNA, ensure you understand the underlying science and math.
- Polish your writing skills; important for research, report writing, and presentations.

Learn more on APG's website: <https://www.apgen.org/cpages/are-you-ready>

What should be part of my educational plan and bookshelf?

- Webinars and classes in your areas of interest (<https://conferencekeeper.org/>)
- Conferences and institutes, such as the ones listed above. APG offers an annual conference (<https://www.apgen.org/cpages/pmc>) specifically for professionals
- Genealogical study groups, such as ProGen, GenProof, and NGSQ Study Groups
- Reference books found on the bookshelves of many genealogists include: *Professional Genealogy*, *Evidence Explained*, and at least one peer-reviewed genealogical journal

See APG's booklist: <https://www.apgen.org/cpages/are-you-ready>

#NGS2024GEN



F305

John Boeren and others
Becoming a Professional Genealogist

Becoming A Professional Genealogist

Presented by the Association of Professional Genealogists

What business skills do I need to be successful?

Genealogists who want to start a sole proprietor business need to make several decisions, including choosing a business name; selecting services to offer; choosing a specialty (or not); and determining what to charge.

The next step is writing a business plan:

- Check out sample business plans at the Small Business Administration’s website (<https://www.sba.gov/business-guide/plan-your-business/write-your-business-plan>)
- Check out budgeting basics at the Service Corps of Retired Executives (SCORE) website (<https://www.score.org/resource/blog-post/7-budgeting-basics-small-business-owners>)
- Consider NOLO’s guide for small business (<https://store.nolo.com/products/legal-guide-for-starting-and-running-a-small-business-runs.html>)
- Decide how much you can invest in starting the business

Register your business

- Every locale has different requirements “Search: your state + corporation requirements”
- Every U.S. state has a helpful website for starting a small business “Search: your state + starting a small business”

Essential skills on the business side (to have or to hire)

- Bookkeeping and budgeting
- Time management
- Planning, organizing, and tracking work
- Communicating with clients
- Marketing
- Website creation and maintenance
- Writing contracts/letters of agreement

How can I grow my business and support client needs beyond my area of expertise?

Having a professional network helps when you encounter an issue outside your specialty. Joining APG is one great way to meet other genealogy professionals, and there are multiple social media group options as well.

Be open-minded about trying new things. Keep learning and stay on top of changes in the industry. If there is an innovation that would greatly help your knowledge base and grow your business, learn everything you can about it. We hope to see you soon at an APG event!

©2024, Association of Professional Genealogists

#NGS2024GEN



F401

LaBrenda Garrett-Nelson, JD, LLM, CG, CGL, FASG
Using Social and Historical Context to Support Indirect Evidence



USING SOCIAL AND HISTORICAL CONTEXT TO SUPPORT INDIRECT EVIDENCE*

Board for Certification of Genealogists® Skillbuilding Lecture

NGS VIRTUAL FAMILY HISTORY CONFERENCE 16–18 May 2024

©2024 LaBrenda Garrett-Nelson, JD, LLM, CG®, CGL^(SM), FASG
<https://www.labgarrettgenealogy.com>

This lecture is based on a case study published in the September 2016 issue of the National Genealogical Society Quarterly, in which context took center stage in the process of analyzing and correlating the evidence available to address a research question.¹

The case study addressed a modern genealogical problem: the birth name of a man born about 1915-1918 in South Carolina. The resolution of the research question was hampered by restrictions on the public disclosure of vital records. The resolution of conflicts among evidence items was supported by evidence gleaned from the historical, geographic, social, and economic context in which the research subject lived—which factors informed the scope of the research plan, identification of relevant sources, and interpretation of evidence leading to a sound conclusion.

The Board for Certification of Genealogist (BCG) *Genealogy Standards* publication is still the only comprehensive compilation of “best practices” (“Standards”) in the field of genealogy, and it is our starting point.² Additional guidance is provided by the rubrics developed by BCG for evaluating applications for the Certified Genealogist® credential but widely used throughout the genealogical community.³

Broad context. Regarding the development of a research plan and scope, Standard 12 calls for the consideration of historical, legal, and other factors that could affect the availability of sources for relevant times and places.⁴ The BCG rubrics make clear that research should extend to sources that might provide additional insights by illuminating or challenging other findings.⁵

* All websites were last viewed on 19 January 2024.

¹ LaBrenda Garrett-Nelson, “Resolving a Modern Genealogical Problem: What was Rainey Nelson’s Birth Name?” *National Genealogical Society Quarterly*, 104 (September 2016): 203-213.

² Board for Certification of Genealogists, *Genealogy Standards*, second edition revised. (Nashville, Tennessee: Ancestry.com 2021).

³ Rubrics for Evaluating New Applications for BCG Certification, Revised 1 January 2021”; PDF, *Board for Certification of Genealogists* (<https://bcgcertification.org/wp-content/uploads/2020/12/BCG-New-Application-Rubrics-2021.pdf>).

⁴ *Genealogy Standards*, 12, Standard 12, “Broad Context.”

⁵ BCG Rubrics, CS1.

#NGS2024GEN



F401

LaBrenda Garrett-Nelson, JD, LL.M., CG, CGL, FASG
Using Social and Historical Context to Support Indirect Evidence

- Example from the case study: If a birth certificate was issued in the name of the research subject born about 1915-1918 in South Carolina, researchers in 2016 would not have had access to it before 2019.⁶

Topical breadth. Standard 14 relates to the topical breadth of a plan, as opposed to the focus of Standard 12 on background context. In addition to sources that might name a research subject or their associates, Standard 14 provides that one should consider sources concerning topics such as “ethnicities..., economies..., social customs and norms, religious, or other aspects of the research questions.”⁷

Evidence Scope. Standard 41 underscores that it is possible to obtain evidence from sources that do not name people of interest, but do provide relevant information regarding “histories of the area, its population, and relevant time periods, and works describing customs.”⁸

- Example from the case study: Although the name used by the research subject since at least 1940 appears on multiple documents, an original marriage record provided the most reliable evidence of his birth name—particularly in view of the unique community where he spent his life.

Correlation of Evidence. Of course, the Genealogical Proof Standard requires “tests of relevant evidence through processes of analysis and correlation.”⁹

Additional Reading

Henningfield, Melinda Daffin, CG®. “The Role of Background Context in Document Analysis,” *OnBoard* 23 (January 2017): 1–2.

Jacobson, Judy. *History for Genealogists, Using Chronological Time Lines to Find and Understand Your Ancestors*. Baltimore, Maryland: Printed for Clearfield Company by Genealogical Publishing Company, 2009.

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

⁶ South Carolina Code of Laws, Title 44. Health, sec. 43-63-80, Chapter 63: Vital Statistics; viewed on *SCStateHouse.gov* (<http://www.scstatehouse.gov>). Records are opened to the public “[w]hen one hundred years have elapsed after the date of birth.”

⁷ *Genealogy Standards*, 13, Standard 14, “Topical breadth.”

⁸ *Genealogy Standards*, 25, Standard 41, “Evidence scope.”

⁹ *Genealogy Standards*, 1–3, “The Genealogical Proof Standard.”



F402

Rebecca Whitman Koford, CG, CGL

John C. McDaniel, Mexican War Soldier: Two Men in a Single Pension Record?

JOHN C. MCDANIEL, MEXICAN WAR SOLDIER: TWO MEN IN A SINGLE PENSION RECORD?



Rebecca Whitman Koford, CG®, CGLSM | rwk.genealogy@gmail.com
National Genealogical Society Family History Conference | May 2024

Board for Certification of Genealogists® Skillbuilding Lecture

Exhaustive Research is Reasonable

The Genealogical Proof Standard (GPS) is a 5-level checklist measuring a finished written argument proposing a solution to a genealogical question of identity, relationship, event, or situation. The GPS challenges researchers to meet high standards of reliability in the proof. One of the learning curves researchers face is a solid appreciation of the first point: reasonably exhaustive research.¹ To approach the concept of reasonably exhaustive research, we will examine it from back to front.

What is “Reasonable” Research?

Looking at the research definition of “reasonable” impels the researcher to seek records which help answer the specific research question. For example, when looking for a Missouri-serving Mexican War soldier’s mistaken identity, it would it be reasonable to search Revolutionary War muster rolls in Rhode Island? Obviously not. Identify reasonable–logical and effective–types of records that are likely to answer the question or lead to answers. Standards to consider from the book, *Genealogy Standards*, when thinking about a *reasonable* research plan to find such records are:

- **Standard 9: Planned research**
- **Standard 10: Effective research questions**
- **Standard 11: Sound Basis**
- **Standard 19: Data-collection scope**
- **Standard 37: Sources, information, and evidence**
- **Standard 40: Evidence discrimination**

When do Reasonable and Exhaustive Meet?

When can a researcher really know if their reasonable search has been exhaustive enough? To break down the seemingly unattainable “exhaustive” nature of the research, create a list of mini-goals to approach the problem that approach it in a practical and analytical manner. Mini-goals are the same as taking each item in a research plan and breaking it down into the how-when-where-and-why of obtaining records. This becomes a matter of understanding what sources are necessary to answer the research question both directly and indirect support for the direct evidence. Alternately, to correctly answer the research question with proof that contradicts direct evidence with more compelling indirect evidence from multiple sources. The answer does not come in counting hours (as in, exhaustive research will take 20 hours or 100 hours), but in an appropriate application of the researcher’s experience and Standards to the particular inquiry. Consider these from *Genealogy Standards*:

- **Standard 17: Extent**
- **Standard 12: Broad context**
- **Standard 13: Source-based content**
- **Standard 14: Topical breadth**
- **Standard 40: Evidence mining**
- **Standard 64: Background information**

¹ References to the GPS and any of the Standards are found in Board for Certification of Genealogists, *Genealogy Standards*, second edition rev. (Nashville, Tennessee: Ancestry.com, 2021).

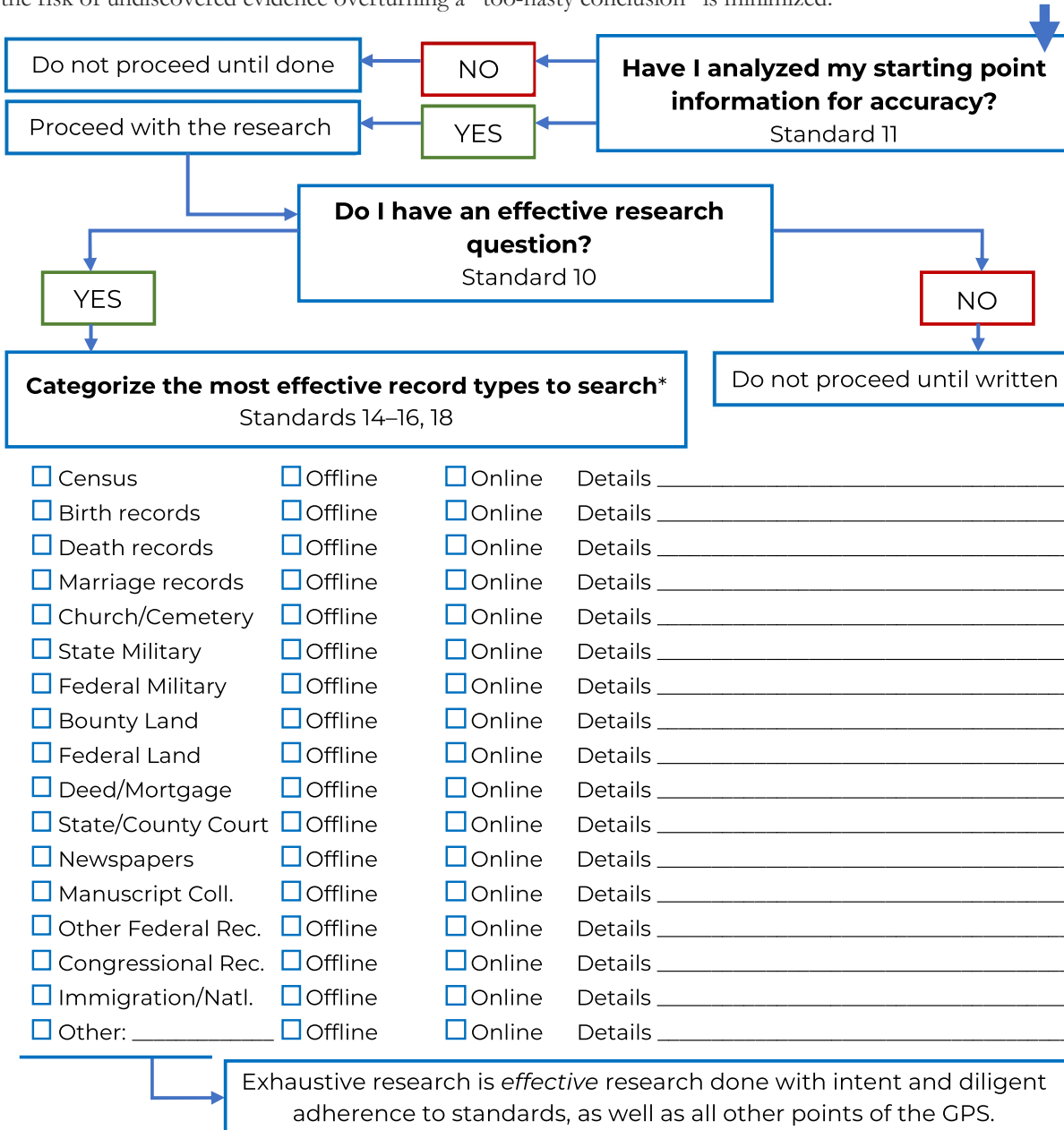


F402

Rebecca Whitman Koford, CG, CGL
John C. McDaniel, Mexican War Soldier: Two Men in a Single Pension Record?

Exhaustive Research Starts One Step at a Time

Has my research been exhaustively reasonable? It depends on if the research question 1) has been answered, and 2) if “examination of all relevant sources” regarding the research question have been investigated so that the risk of undiscovered evidence overturning a “too-hasty conclusion” is minimized.²



#NGS2024GEN

² Board for Certification of Genealogists, *Genealogy Standards*, 2.

**The above is not a full list of potential sources, only an idea list for purposes of this lecture.*



F402

Rebecca Whitman Koford, CG, CGL

John C. McDaniel, Mexican War Soldier: Two Men in a Single Pension Record?

Case Study in Researching: Realistically Exhaustive?

This case study can serve as an example of U.S. research in military records for men of the same name in the Mexican War serving in Missouri. “Reasonable” and “exhaustive” would be met for the research question in searching records on this general checklist. *Note that this list started after 1*) the known ancestor had been identified with a marriage record, censuses, as a warrantee of Bounty Land on the BLM-GLO website (glorerecords.blm.gov), with his children’s identifiers (death certificates & obituaries, including the daughter’s which said she was orphaned at age 2 ½, etc.), court records, in company with a large cluster who he stayed close to at every location in Missouri, and with records of the people in the cluster family. Inconsistencies and conflicts were identified in the Pension File and Bounty Land Application File, leading to this inquiry.

Offline Research

- [Mexican War Service Records at NARA, RG 94](#)
- [Mexican War Pension Records at NARA, RG 15](#)
- [Bounty Land Application Files at NARA, RG 15](#)
- [Bounty Land Surrendered Warrants at NARA, RG 49](#)
- [Muster Roll, 3rd Regt, Co. G, at NARA, RG 94, PI 17 e57](#)
- History of Mexican War Regiments from Missouri at FSL
- Published resources, [Missouri State Archives](#)

Online Research

- [Muster Rolls of Military Posts at Ancestry](#)
- Census records
- Maps at loc.gov/maps/ & catalog.archives.gov
- Newspapers at fee-based websites
- Various marriage records at *Ancestry*
- Probate records (unindexed) at [FamilySearch Catalog](#)
- Land & tax records (unindexed) at [FamilySearch Catalog](#)
- Court records (unindexed) at [FamilySearch Catalog](#)
- Additional patents at glorerecords.blm.gov
- [Missouri Pre-1910 Death record database](#)

Methodology

- Research Logs & comparison tables
- Mexican War Records for cluster family associates at NARA
- Read about pension law for Mexican War veterans
- Compare distances & locations between Springfield and Jefferson Barracks
- Study units of 3rd Regiment and Jefferson Barracks (ex: Wm Roberts’ [Mexican War Veterans](#), published 1887)
- Look for and compare both men & children in censuses 1850–1900
- Look for and compare marriage records, court appearances, patents, land records for 1850–1900
- Compare signatures between years for each man of the same name
- Write article-style report with proof arguments and citations

Recognizing & Resolving Conflicts in Research

Some conflicting information is obvious, some not. The best approaches to identify and resolve conflicts are to apply methods of comparing and contrasting information as evidence is gathered. This is done in tables, comparison charts, and proof arguments. In other words: WRITING. Writing out a problem is a task-oriented way to evaluate the scenario, contextualize it, and establish objectives and desired end goals. Use writing to ask yourself questions, so that you can essentially take the problem out of your head and work it out. Read up on:

- **Standard 58: Research Scope**
- **Standard 60: Selection of appropriate options** (discusses proof arguments)
- **Standard 61: Logical organization**
- **Standard 69: Clear writing**

The words Certified Genealogist and its acronym, CG, are a registered certification mark, and the designations Certified Genealogical Lecturer and its acronym, CGL, are service marks of the Board for Certification of Genealogists®, used under license by board certificants after periodic evaluation.

© 2024 · Rebecca Whitman Koford Genealogical Research, LLC · All rights reserved

#NGS2024GEN



F402

Rebecca Whitman Koford, CG, CGL
John C. McDaniel, Mexican War Soldier: Two Men in a Single Pension Record?

Compare and Contrast the Evidence

Known Ancestor Facts

c. 1821 Military Service Record & 1860 census:
Calculated birth c. 1821 in Tennessee

1847-48 Military Service Record:
2nd Lieut., Co. G, Capt. Boake, 3rd Regiment, Missouri Mounted Infantry. Age 25 with own horse. Enlisted 8 May 1847 at Springfield. Mustered out 21 October 1848.

1850 1850 census:
Washington Twp., Taney Co., Missouri.
Age 33, born Tennessee, farmer; with apparent wife and 2 sons.

1852 1852 marriage record:
Stone Co., Missouri.
Married 2nd wife, 29 August 1852

1860 1860 census:
Pierce Twp., Stone Co., Missouri.
Age 35, born Tennessee, farmer; with named 2nd wife, 2 sons, and 2 daughters.

1862-63 Obituary of daughter:
1946 obituary of daughter states she was orphaned from both parents in Missouri at age 2 ½.
Ancestor therefore died about 1862-63. *No burial, probate, newspaper, or other record found. Last court record dated September 1860 for jury service in Stone County. Cluster family left 1861-1863 for Texas with daughter & one son. Ancestor, wife, & 2 other children no longer appear in records with cluster of family & associates.*

Military Pension Record

1821 Statement of Identity
[made in 1887 from Jefferson Co.]
Born at Jefferson Co., Missouri on 4 April 1821

1847 Statement of Service
Private, Capt. Jones, at Jefferson Barracks. Guarded trains. Enlisted there 17 June 1847. Mustered out there October 1847.

1866 Statement of Marriage
Married a wife in March 1866 at St. Louis County; she died December 1881 in same county.

1880 Statement of Children
Only one living son born April 1880

1887 Applied for pension 10 March 1887
Pension awarded 9 June 1887
Bounty land claim used as proof of service

1906 Pension Office Letter
Pensioner deceased 1906 in St. Louis Co., Missouri

Military Bounty Land Application

1848 Statement of Identity
Military Discharge dated 7 November 1848 at Springfield. Soldier was 2nd Lieut. in Co. G with Capt. Boake, under Col. J. Ralls, 3rd Regiment Mounted Volunteers
Soldier aged 26, farmer, born Grainger County, Tennessee

1849 Pension office notation
Warrant issued 17 February 1849 for 160 acres, no. 47782
[Surrendered warrant shows soldier assigned (sold) title on 5 July 1849 at the Springfield Land Office, Springfield, Missouri]

1903 Application by soldier of "Co. G under Capt. Jones" for Bounty Land.
Denied because already issued.

#NGS2024GEN

Asking Questions is Asking for Answers

© 2024 · Rebecca Whitman Koford Genealogical Research, LLC · All rights reserved



F403

Janice Lovelace, PhD

Lunacy and Asylums: Exploring Mental Health Treatment in 19th Century for Women

“Lunacy and Asylums: Exploring Mental Health Treatment in the 19th Century for Women”

Janice Lovelace, Ph.D.

Janicelovelace2@gmail.com

Did your female ancestors struggle with mental health issues? Were they committed to an asylum in the 1800s? What records can you access?

- I. History of mental health treatment in 19th century
 - a. Lunacy – “intermittent insanity once believed to be related to phases of the moon” (Merriam Webster dictionary)
 - b. Religious view – satanic possession
 - c. First asylum in US in late 1700s – custodial, no treatment
 - d. Friends Asylum – 1817 in Philadelphia, focus on healthy life
 - e. Private or public?
 - f. Phillippe Pinel (early 1800s) and Dorothea Dix (mid 1800s) seen as reformers; push for humane treatment in asylum
 - g. Located far from others “put away”

- II. Causes for being committed
 - a. Main diagnoses – melancholia, mania, dementia
 - b. Women’s reasons for commitment – usually depression and anxiety
 - c. Suicidal and/or homicidal
 - d. Generally committed against one’s will for undetermined time

- III. Treatment in 19th century
 - a. Disorders treated differently

©Janice Lovelace, Ph.D. 2024



F403

Janice Lovelace, PhD

Lunacy and Asylums: Exploring Mental Health Treatment in 19th Century for Women

- b. Leeching – suck out “bad blood”
 - c. Medications
 - d. Hot baths or ice baths
 - e. Confinement
- IV. Finding records
- a. Location - Where committed – differing state record access
 - b. Court records
 - c. Censuses of inmates
 - d. Special census – “defective”
 - e. Death records – die at asylum? Burial at asylum cemetery or in nearby town?
 - f. Newspapers – public behavior, commitment, suicide; obituary
 - g. Manuscripts – by staff and by those institutionalized
- V. Privacy and access to records
- a. Direct descendant may be able to get access through court

Resources

DeYoung, Mary. *Madness: An American History of Mental Illness and Its Treatment*. Jefferson (NC): McFarland and Company, 2010.

Jansson, Asa. *From Melancholia to Depression: Disordered Mood in Nineteenth Century Psychiatry*. McMillian, 2021 (reprint)

Torrey, E Fuller. *American Psychosis*. New York: Oxford University Press, 2014.

Whitaker, Robert. *Mad in America*. New York: Perseus Publishing, 2002.

Ziff, Katherine. *Asylum on the Hill: History of a Healing Landscape*, Miami: Ohio University Press, 2018.

©Janice Lovelace, Ph.D. 2024



F404

Emily H. Garber, MA

It's What They Answered To: Understanding Ashkenazic Jewish Names

It's What They Answered To: Understanding Ashkenazic Jewish Names

Emily H. Garber ♦ extrayad@gmail.com

For a more comprehensive version of this syllabus, see:

<https://www.dropbox.com/scl/fo/7shpuc3qxbkzki512i4wp/h?rlkey=bxz6qw7mcdin7hvv73uw2x7kn&dl=0>

Jewish people's names were the result of a complex amalgam of family, business, social, and religious influences, as well as their interactions with government authorities. Unlike their Christian neighbors, most Jewish people only adopted permanent family surnames when required by the government. Ashkenazi Jews, depending upon context, may have answered to several different forenames in several different languages.

Along with determining immigrant communities of origin, determining the individual names used in a variety of contexts is critical to following people back to the old country. Successfully linking immigrants with their old world records is dependent upon seeking out and understanding the clues that may come from a variety of records.

Patronymics, Matronymics and Nicknames/By-names

Prior to adopting fixed, hereditary surnames, most Jewish people in Europe used patronymics, matronymics or by-names (nicknames). Depending on situations, individuals might use different ones. These names were *not* passed on to the next generation.

Jewish Surnames

Rabbinical dynasties among Ashkenazi Jews in central and eastern Europe took fixed surnames relatively early as a means of tracing heritage. If a genealogist can trace family history to one of these Rabbinical lines, then they may be able to go back well into the 18th century or even earlier. Even so, many Rabbis were not commonly known by their surnames.

Secular rulers in Europe imposed surnames on the general Ashkenazi Jewish populous starting in the late 18th century and, mostly, in the 19th century. Austrian Emperor Joseph II was the first European ruler to mandate surnames among Jews (23 July 1787). Austrian Jews had to adopt German-language forenames and family names (restrictions on forenames were later eased). Western Galicia (Congress Poland) forced Jews to adopt surnames starting in 1805.

Napoleon issued the Decree of Bayonne in 1808, which specified that Jewish heads of household in the area under his rule had to declare family names for themselves and their families. After 1815 when Napoleon's empire collapsed, the area under new Russian rule became known as Congress Poland (or Kingdom of Poland) and Krakow. Thus, Jews in Congress Poland came into the Russian Empire with German surnames (e.g., includes Lublin and Krakow).

Most Jewish people who became Russian subjects due to the breakup of the Polish Lithuanian Commonwealth in the 1790s did not have fixed surnames. Czar Alexander I's edict (ukase) of 9 December 1804 required that each Jewish person residing within the Russian Empire adopt a

Copyright © 2024 by Emily H. Garber. All rights reserved.



F404

Emily H. Garber, MA

It's What They Answered To: Understanding Ashkenazic Jewish Names

hereditary surname to be used in all registers and transactions. Most Jews adopted surnames within about a decade. But there were more rural locations with the Pale where Jews resisted surname adoption into the 1850s. Gravestones in eastern Europe typically did not include surnames.

Procedures for Surname Acquisition in Eastern Europe

There are few contemporary records documenting the process in the Austrian or the Russian Empires.

Austrian (Hapsburg) Empire

Under his edict of 23 July 1787 (and subsequent regulations), Emperor Joseph II required that all Jews take German language fixed surnames no later than 15 January 1788. Jewish heads of households registered new surnames, subject to approval, with local authorities.

Russian Empire

From the time of the edict of 9 December 1804 until 1844, when they were abolished by the Russian government, kahals were responsible for name adoption procedures. Surname spelling was to be consistent and could suffer no alteration. Thus far, researchers have located no contemporary descriptions of the name adoption process. Nor have Kahal-generated registers of names been located.

A seminal study by Paull and Briskman examined 1784 (pre surname adoption) and 1811 (post surname adoption) Revision List (census) records from Slutsk [in the Grand Duchy of Lithuania and, later, Minsk Gubernia (today in Belarus)].¹ They were able to correlate entries for the same families before and after the Czar's 1804 edict and found that members of the same family who lived in separate houses acquired different surnames.

Surname changes in the Eastern Europe

In Rabbinic lines there are documented cases where a man who married an illustrious Rabbi's daughter took the Rabbi's surname as his own. In most cases, however, in eastern Europe, the convention was that a married couple assumed the groom's surname.

Austrian Empire

The edict of 5 June 1826 stated that Jewish surnames could only be changed when a Jewish person converted to Christianity or joined the nobility. All other cases were subject to approval by the emperor. Despite this, spelling continued to be phonetic and variable from document to document and scribe to scribe.

Rules regarding civil marriage in the Austrian Empire had a great effect on Jewish name changes. Galician Jews felt that marriage was a religious not a civil concern and resisted harsh Austrian Empire requirements that included tests and taxes. Jewish brides and grooms would have religious

¹ Jeffrey Mark Paul and Jeffrey Briskman: "The History, Adoption, and Regulation of Jewish Surnames in the Russian Empire – A Review." *Surname DNA Journal*, September 21, 2014.

Copyright © 2024 by Emily H. Garber. All rights reserved.



F404

Emily H. Garber, MA

It's What They Answered To: Understanding Ashkenazic Jewish Names

marriages but would usually not civilly record them. Even after emancipation in 1869, many Galician Jews felt that the government should have no role in regulating marriage.

Birth records for children of unregistered marriages identified the children as illegitimate. Regulations regarding illegitimacy required that only the mother was named on the record. The child's father might not be identified at all unless he appeared with two witnesses who would vouch that he was, indeed, the father.²

All official documents identified illegitimate children with their mothers' surnames. When these children married, they might only be identified with their mothers' surnames. They would not, under law, be considered their fathers' heirs. If parents registered their marriage civilly any time after the birth of a child, they could petition for a notation of the father's name on the child's birth record. At that point, the government would officially recognize paternity.

With increasing emigration in the late 19th century, there was a great increase in Jewish marriage registration in Europe. Couples married so they or their children could get travel authorizations with correct surnames.

Russian Empire

Many Jewish families have oral histories family members changed their surnames to avoid military conscription. Stories include younger sons being adopted out to families with no sons so that they could avoid the draft.³ An analysis of the state of adoptions in the Russian Empire concludes that legal adoption along with acquisition of a new surname was not an option for Jewish people.⁴ Nevertheless, there are documented cases of full brothers with different surnames.

False (f.), Vel (v.) and Recte (r.)

When viewing old world records (especially those from Galicia or Congress Poland) one may see the following Latin terms/abbreviations between two different names:

false (or f.) – incorrectly. Usually used with surnames.

recte (or r.) – legally or correctly. Usually used with surnames.

vel (or v.) – for alias or otherwise called. Usually used with forenames.

² S. Wynne, *The Galitzianers: The Jews of Galicia, 1772-1918* (Kensington, MD: Suzan Wynne, 2006), p. 58-61.

³ Russian rules for conscripting Jews were *not* static. In 1827, Jewish males, age 12-25, became subject to compulsory service for 25 years. In 1856, Alexander II abolished conscription of Jewish children and reduced service time to 5-10 years. In 1874, all Russian males (Jews included) were obliged to serve 6 years in land forces and 9 in reserves. There were exemptions for only sons, sole breadwinners, and families with one member already in service.

⁴ J.M. Paul and J. Briskman: "The History, Adoption, and Regulation of Jewish Surnames in the Russian Empire – A Review." *Surname DNA Journal*, September 21, 2014.

Copyright © 2024 by Emily H. Garber. All rights reserved.



F404

Emily H. Garber, MA
It's What They Answered To: Understanding Ashkenazic Jewish Names

First Names

Jews often follow naming *customs* (i.e., not religious laws) embraced by their Jewish communities. Sephardic Jews typically name their children after living relatives. Ashkenazic Jews usually name newborns for deceased relatives.

Nearly every Ashkenazic Jewish immigrant might have had two or three (or more) first names in his/her lifetimes. Each had a purpose.

	Religious	Venacular	Secular
Language	Hebrew	Yiddish	Local (govt)
Usage	Synagogue	Everyday & govt • family • friends • community	Govt records
	Bris (circumcision)		
	Ketubah (marriage)		
	Get (divorce)		
	Gravestones	Often on gravestones	Recently on gravestones

Immigrants often selected new secular names in the language of their new country. The name might or might not have a relationship to the Yiddish or Hebrew names they used in Europe and probably still used with their family and friends.

Considerations

Names may have been the same in the old country *and* in the new land.

Name variations and nicknames (e.g., Srul is a nickname for Israel or Yisrael).

Name changes could have taken place before or after immigration.

Family stories about names and name changes might be faulty.

On vital records, Immigrants often Anglicized names of people who had never left the old country.

Spelling of names is irrelevant.

- Clerks took license in both the old country and the new.
- Old world names were likely in different languages/alphabets.
- Indices often reflect how familiar indexers were with eastern European names.

Immigrant ancestors may not have had their European surnames for very long in the old country.

- This can make identifying DNA relatives via surnames very fraught.
- Among Ashkenazic Jewish people, there may be many DNA matches with very few common surnames.

No one record will provide the answer. But taken together, several records may provide clues necessary to solve the puzzle.

Copyright © 2024 by Emily H. Garber. All rights reserved.

#NGS2024GEN



F501

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS
Using Mitochondrial DNA (mtDNA) to Solve a Misattributed-Parentage Case in America’s Colonial Era

USING MITOCHONDRIAL DNA (mtDNA) TO SOLVE A MISATTRIBUTED-PARENTAGE CASE IN AMERICA’S COLONIAL ERA

BOARD FOR CERTIFICATION OF GENEALOGISTS[®] SKILLBUILDING LECTURE

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS ♦ Tom@JonesResearchServices.com

Description: : A case study shows mtDNA solving an unknown parentage problem more than two centuries old. It also demonstrates the overturning of a seemingly proved conclusion.

#NGS2024GEN

Publication in 2006

- An article published in the *National Genealogical Society Quarterly* proposed that the parents of Ignatius Tureman’s wife Eleanor [—?—] were Jacob and Elizabeth (Crossthwait) Medley, who lived in what today is Culpeper County, Virginia.
- Eleanor had married three times in Virginia, but only the third marriage, when she was a widow using her prior husband’s surname, was recorded, leaving Eleanor’s parental surname unknown.

The 2006 Rationale

- The conclusion came with caveats: “The evidence is not as clear-cut as family historians might like”; “No record identifies Eleanor’s parents directly”; and “no record or rationale definitely rules out either [set of candidate parents].”
- Eleanor’s first husband interacted with interrelated Klugs and Medleys in Virginia, providing three alternative hypotheses for her father’s identity:
 - *Someone besides Jacob Medley and Rev. George Samuel Klug.* This hypothesis was eliminated from consideration because the many seemingly nonrandom interactions of Eleanor and her first husband with Klugs and Medleys would be unexplained.
 - *Rev. George Samuel Klug, an immigrant from a Prussian area of Poland.* This hypothesis was ruled out for several reasons including the absence of a record in the time and place naming Eleanor Klug.
 - *Jacob Medley, of English descent.* Evidence of an Eleanor Medley in the time and place was found, leaving this as the viable hypothesis.

Copyright © 2024 by Thomas W. Jones.



F501

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS

Using Mitochondrial DNA (mtDNA) to Solve a Misattributed-Parentage Case in America's Colonial Era

mtDNA

- Because mutations in mtDNA are rare, copies of the molecule pass unchanged from mother to child for generations. That characteristic makes it ideal for helping identify unknown mothers of women who lived long ago, like Eleanor.
- Sons and daughters receive copies of their mothers' mtDNA, and daughters pass copies to their children. Male and female test takers who share mtDNA can help identify an unknown mother. At least one should have a documented female line ascending to the woman whose mother is unknown; at least one other should have a female line ascending to a prior generation.

A test-taker with a female-line to Eleanor

- Eleanor's female lines were traced forward to the present to find a living person who had inherited her mtDNA.
- In 2017 Dr. Warren Haddox Sothoron Jr., now deceased, agreed to take a full-sequence mtDNA test with FamilyTreeDNA.
- Dr. Sothoron's female line is documented (birth, death, marriage, and parentage data) for seven generations from him, born in 1936, back to Eleanor, born within a few years after 1748.
- Four years later Dr. Sothoron's mtDNA match-list on FamilyTreeDNA was populated with twelve other mtDNA test takers who had taken full-sequence tests.

The other test takers

- The mtDNA of all thirteen test takers is in a small subclade representing about 0.04 percent of mtDNA Haplogroup H and less than 0.006 percent of reports of female-line origins to FamilyTreeDNA. The rarity of this subclade helps make the case for Eleanor's maternity.
- One test taker in Dr. Sothoron's match list is an adoptee with little information about his genetic mother.
- Seven other test takers, whose kits are managed by the same researcher, all stop at a woman born in 1818 to seemingly unfindable parents.
- The four remaining test takers, a man and three women, include one test taker with mtDNA identical to Dr. Sothoron's mtDNA and three test takers whose mtDNA differs from Dr. Sothoron's by one mutation.
- None of those four test takers descends from Eleanor [—?—].
- Those four test-takers' female lines are documented (birth, death, marriage, and parentage data) for ten generations from the test takers back to the 1600s.

Copyright © 2024 by Thomas W. Jones.

#NGS2024GEN



F501

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS

Using Mitochondrial DNA (mtDNA) to Solve a Misattributed-Parentage Case in America's Colonial Era

Converging lineages

- The ten-generation female-line lineages of the four test takers who share mtDNA with Dr. Sothoron converge on Susanna Christina Schnell, who was baptized in the Duchy of Württemberg in 1688. She was the daughter of Johan Michael and Anna Susanna (Pistorius) Schnell.
- Two of the mtDNA test takers descend through Susanna Christina's daughter Anna Magdalena Castler. The other two mtDNA test takers descend through Susanna Christina's other daughter, Susanna Castler.

The Castlers

- In 1711 Susanna Christina Schnell married Matthäus Gessler (Castler). Their two daughters are their only known children.
- The four Castlers migrated to Virginia around 1720 and settled in the Germanna community in today's Culpeper County, Virginia, the area where Eleanor and the Medleys lived and the community for which the Rev. Klug was minister.
- The Castlers had no known Schnell or Castler relatives who immigrated to the American colonies. Susanna Christina (Schnell) and her two daughters may have been the only people to bring their unique mtDNA signature from German-speaking Europe to North America.

Conclusions

- The mtDNA evidence implies Eleanor and five mtDNA test takers (including Dr. Sothoron) descend from Susanna Christina (Schnell) Castler.
- The eight other test takers who share mtDNA with Dr. Sothoron likely also descend from one of Susanna Christina Schnell's two daughters. Dr. Sothoron's mtDNA, his documented female line to Eleanor, and his shared mtDNA with four documented descendants of Susanna (Schnell) Castler suggests that Eleanor, too, descends from Susanna (Schnell) Castler.
- The Castlers' daughter Anna Magdalena Castler (female-line ancestor of two of the mtDNA test takers) married Conrad Delph. The Castlers' daughter Susanna Castler (female-line ancestor of the other two mtDNA test takers) married the Rev. Klug.
- Eleanor's association with the Klugs suggests her mother was Susanna (Schnell) Castler's daughter Susanna (Castler) Klug, overturning the case study published in 2006.

Rebutting the other candidate

Indirect evidence in 2006 suggested that Elizabeth (Crosstwait) Medley was Eleanor's mother. If Elizabeth had daughters, whose female-line descendants would have inherited her mtDNA, they are unrecorded, preventing the identification of her mtDNA signature. Elizabeth's English surname, makes her an unlikely relative of Germanic immigrant Susanna Christina Schnell.

Copyright © 2024 by Thomas W. Jones.



F501

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS

Using Mitochondrial DNA (mtDNA) to Solve a Misattributed-Parentage Case in America's Colonial Era

Eleanor's genetic father?

- Eleanor was born after her genetic mother married the Rev. Klug. If conceived before his death, Eleanor legally was his child. He likely was her father genetically, too, but no genetic evidence supports that possibility.
- Eleanor's genetic father might have been Joseph Medley, supported in the 2006 article. Her mother married him after thirty years of widowhood.

Lessons from this case study

- Genealogists can use mtDNA identify female ancestors in a time period where autosomal DNA might not be effective.
- Success requires a sufficient number of test takers who took full-sequence mtDNA tests and who have identical or near identical mtDNA. It also requires that they share enough information for a researcher to trace their female lines back many generations.
- Consideration of the possibility that when the test-takers' female lines converge on a woman, female-line relatives of the woman, rather than the woman herself, could be the source of the shared mtDNA. By itself shared mtDNA does not eliminate possibilities other than the convergence.
- Although this case included serendipitous matches, it also included a targeted test taker. It would never have succeeded without him.
- The hardest part of creating a convincing mtDNA case is documenting many generations of females, one person at a time.
- Technological advances can overturn genealogical cases that seemed proved.
- Corrections to prior published research also should be published, ideally in the venue that published the original conclusion.
- Put the findings into a genealogical context. For example, this case identified one of the Rev. Klug's three unnamed daughters and extended Eleanor's documented paternal and maternal ancestry for several generations.
- Expect serendipity. The amount of documentary research that mtDNA cases require can overturn unused records, and it can document previously unknown parent-child relationships. In this case, a proof summary of a mother-daughter relationship supported a relationship that has been misidentified for nearly a century.

References

- Bettinger, Blaine T., and Judy G. Russell. "Genetics for Genealogy." In Elizabeth Shown Mills, ed., *Professional Genealogy: Preparation, Practice & Standards* (Baltimore: Genealogical Publishing, 2018), 361–90, at 364–67.
- Jones, Thomas W. "Uncovering Ancestors by Deduction: The Husbands and Parents of Eleanor (née Medley) (Tureman) (Crow) Overton." *National Genealogical Society Quarterly* 94 (December 2006): 287–305.

Copyright © 2024 by Thomas W. Jones.

#NGS2024GEN



F502

Diahan Southard
It's Not What You Know, but Who You Know - Even in DNA

It's Not What You Know, But Who You Know, Even in DNA

Diahan Southard

Founder and CEO of Your DNA Guide; Author, *Your DNA Guide-the Book*
www.yourDNAguide.com

I see it all the time. Someone has an ancestor to find and they turn to their DNA for answers. But as soon as they login to their DNA match list, they scroll past all those top matches saying something dismissive like, "Oh, I know all of those people," and zero in on a match they don't know their relationship to. What they don't realize is that the key to identifying these unknown matches lies in a straightforward process I call The Plan. The Plan begins with your known matches.

The Power of Known Matches

Your Known Matches are those people in your DNA match list to whom you already know your relationship. Now, you don't actually have to *know* them, you just have to be able to see how they fit into your tree. Your BEST Known Matches (BKMs) are cousins that are descendants of the ancestor you want to research. Why are these matches so important? Well, it is because the DNA they share with you actually acts like a magnet to pull out of your huge DNA match list only those DNA matches that are relevant to your search.



To find these BKMs

Some may be obvious to you, perhaps those you actually know or those you have identified by DOING GENEALOGY. But if you are on the hunt, there are two easy(ish) ways to find them:

- *ThruLines* is a tool from AncestryDNA, available to those who have a subscription. It pulls in the DNA matches on your match list who have a common ancestor with you (according to your tree and theirs). Learn more at <https://www.yourdnaguide.com/ydgblog/ancestry-thrulines>.
- *Theory of Family Relativity* is a tool from MyHeritageDNA, available to those who are subscribers. When your DNA match has a Theory, you can click on it and see a variety of ways that you might be connected to that match, according to family trees (yours, theirs, and others') and historical records. Learn more at <https://www.yourdnaguide.com/ydgblog/myheritage-theory-of-family-relativity>.

Both of these tools can help you quickly identify a BKM so you can move onto the next step in The Plan.



F502

Diahan Southard

It's Not What You Know, but Who You Know - Even in DNA

Looking for a birth parent or grandparent?

If you are, you probably just rolled your eyes at this first page as you don't have ANY known matches, so where does that leave you? No worries, if you are looking for a birth parent you can just choose your highest unknown match to begin The Plan.

Finding A Best Mystery Match

OK, with your BKM in hand, you can now use the Shared Matches tool to help you gather the DNA matches that are most likely to help you find your missing ancestor. The Shared Matches tool is available to subscribers at AncestryDNA and MyHeritage DNA (also to MyHeritage DNA transfers who have paid the unlock fee), and to everyone who has tested at FamilyTreeDNA (though it is called the In Common With tool there). Learn more at:

<https://www.yourdnaguide.com/ydgblog/how-to-find-shared-matches>.

This list of shared matches should be evaluated for your Best Mystery Matches (BMM). These will be matches with the right amount of shared DNA to help you with your particular question. For example, if you are missing a 2X great grandparent, look for a third cousin to help you.



Finding Your Generation of Connection

Once you have identified a BMM (or several!) you will want to identify what I call your Generation of Connection. This is the generation in your match's family tree that most likely holds your common ancestor. Finding this point is always an estimate, but it can help you see how far out you may need to build the family tree of this match in order to find your shared ancestor. Learn more about the generation of connection:

<https://www.yourdnaguide.com/ydgblog/dna-matches-generation-of-connection>.

What if that doesn't work?

All the best laid plans take detours, and this Plan is no different. If you find yourself without Best Known matches to help you find the right group of matches, you can still move forward with your research using a technique called Bottoms Up. This is where you go to the bottom of your shared matches list, and use the matches you find to separate your shared matches list into two groups to make it easier to research.

No matter the composition of your DNA match list, or if you do or don't have Best Known Matches, you can be sure that following The Plan will help you move forward in your research.

#NGS2024GEN



F503

Jill Morelli, CG, CGL, Shamele Jordan, Angela Packer McGhie, CG, FUGA, Mahina Oshie, Robert Raymond, Lori Samuelson, MA, MEd, Karen Stanbury, MA, LCSW, CG, Evan Wilson
Rapid Roots: Seven Share their Secrets in Seven Minutes

Rapid Roots: Seven Speakers Share their Secrets

Lori Samuelson, Karen Stanbury, CG, Evan Wilson, Mahina Oshie, Shamele Jordan, Angela Packer McGhie, CG, and Robert Raymond

Jill Morelli, CG, CGL, editor, producer, facilitator and general herder of cats

jmorelli@gmail.com

Using a Pechakucha format of a tightly choreographed rapid-fire series of presentations, seven outstanding genealogists present their secrets to a successful outcome with twenty images, each twenty seconds long. Buckle up!

Lori Samuelson, GenealogyAtHeart@gmail.com

Individuals embarking on their genealogical journey are often told to begin with themselves, record everything they know, & reach out to family members. Then what?!

TIP #1: Organization is Key

- Scan papers to search & find digital records quickly
- Back up via a Cloud and standalone hard drives, sharing with family

TIP #2: Making Connections

- Message online tree owner & DNA matches; Upload DNA results widely
- Use social media & blogging to make additional connections
- Attend local genealogy and historical group events; Volunteer locally or:
 - NARA <https://www.archives.gov/careers/volunteering>
 - FamilySearch.org <https://www.familysearch.org/getinvolved/>
 - Fields of Honor Database <https://www.fieldsofhonor-database.com/>

TIP #3: Discover Ancestors in Historical Context

- Read about the region's history; try audio books
- Cast a wide net to find personal correspondence and diaries
- Use AI to create timelines and narratives checking for accuracy & sources

Robert Raymond, Robert.Raymond@familysearch.org

More information about Robert's tips can be found at <http://bit.ly/RRHandout>. To put them in context, many of his tips are about FamilySearch.

Tip #1: Full-text historical record search is a game changer. Try the experiment.

Tip #2: Use FamilySearch Family Tree to share documents and photographs.

Tip #3: Filter historical records by collections, dates, and places.

Tip #4: When searching by race, use filtering instead of the search field.

Tip #5: New records show up within a week, unindexed. Click Search > Images.



F503

Jill Morelli, CG, CGL, Shamele Jordan, Angela Packer McGhie, CG, FUGA, Mahina Oshie, Robert Raymond, Lori Samuelson, MA, MEd, Karen Stanbary, MA, LCSW, CG, Ewan Wilson
Rapid Roots: Seven Share their Secrets in Seven Minutes

Tip #6: Maximize the power of your browser: Ctrl+F. Select, copy, paste. Open in new tab. Google image search. Shorten addresses to the “?” (but test).

Tip #7: Use artificial intelligence for handwriting recognition, correction, and translation.

Tip #8: FamilySearch’s handwriting recognition may be public one day.

Tip #9: The Digital Library is every-word searchable and has 500K genealogy books.

Tip #10: FamilySearch Genealogies has Mayflower, medieval, African genealogies, etc.

Tip #11: The FamilySearch Research Wiki is a world-class how-to resource and reference. It contains place guides, online record pointers, foreign word lists, record selection guides, more information about historical record collections, etc.

Karen Stanbary, CG

Tip #1: Research families, not individuals. Look for evidence of parental birthplaces in children’s marriage and death records.

Tip #2: Beware researcher confirmation bias---systematically rule out competing hypotheses rather than ruling in by jumping to conclusions.

Tip #3: Genetic evidence is direct evidence of a relationship but indirect evidence of the specific relationship. It must be correlated with documentary evidence to achieve proof. Proof rests on the BODY of EVIDENCE which is greater than the sum of its parts. Correlation is the key to success.

Tip #4: The genealogical proof standard is not a process—it is a measurement to assess the likely accuracy of a conclusion.

Tip #5: Don’t be numbers obsessed. Autosomal DNA amounts are SQUISHY! Somebody has to make up the 1%.

Tip #6: Most genealogy rests on syllogisms. Explain your reasoning using nouns and verbs. Charts do not communicate reasoning.

Tip #7: Beware of slick automated tools. The best tool of all is your brain.

Shamele Jordan

Finding Family in the Freedmen's Bureau records:

TIP #1: Take advantage of the three search engines that are available. Records will be missed since the indexes are not complete.

DiscoverFreedmen.org (FamilySearch) | Ancestry.com | Freedmen’s Bureau Search Portal

TIP #2: Climb the hierarchy of the Freedmen's Bureau, which was a multi-level military organization. **EFFORT** is required. Establish in 1870, Find their cluster, Find the nearest field office, **Other** officers available? **Rise** in the hierarchy (Sub Assistant Commissioner - Assistant Commissioner - Commissioner), Take notes on the targets of interest *NARA Descriptive Pamphlet (DP) | Smithsonian Online Virtual Archives (SOVA)*



F503

Jill Morelli, CG, CGL, Shamele Jordon, Angela Packer McGhie, CG, FUGA, Mahina Oshie, Robert Raymond, Lori Samuelson, MA, MEd, Karen Stanbary, MA, LCSW, CG, Evan Wilson
Rapid Roots: Seven Share their Secrets in Seven Minutes

TIP #3: Do the Dr. Debbie (Abbott). Read page by page. This is the most foolproof way to research and immerse yourself into the context of “what was going on.”

Read the DP | Read your field office records | Read the reports on the field office and up

Mahina Oshie, MLIS

For many of us who have Black and brown ancestors the paper trail can often end too soon. This can also affect other populations where for example, ancestors come from war-torn countries with massive record loss, and cases of misattributed parentage, or adoption in recent or remote generations.

Tip #1: Social history contextualizes the lives of your ancestors by learning about the time and place they came from and can provide answers when the paper trail ends. Use websites, books from your local library, or books online Google Books (<https://books.google.com>); Internet Archive (<https://internetarchive.com>); and Hathi Trust. (<https://hathitrust.com>)

Tip #2: Take a DNA test. Start with Ancestry DNA – has the most users. Do a second test at 23andMe. Upload your raw DNA to FamilyTree DNA, MyHeritage, and GedMatch. Having your test results in multiple databases increases your chances for cousin matches. Ancestral heritage can be useful in context. Remember, a DNA test does not change who you are but it can inform what you can learn about your ancestors.

Tip #3: Look again, and again...and again. Just because you haven't found the record you are looking for, it doesn't mean you won't find it later. Keep a research journal or log to track what you have looked for and where. Periodically, try another way to find the information you are looking for.

Evan Wilson

Tip #1: “Explain yourself”: Treat yourself like a client who is suspicious of how you're spending their money. Every time you do research, even for just a few minutes, do the following three things:

1. Log every search in a table that includes a citation, purpose of search, and specific results.
2. Summarize and justify what you did that day/hour (etc.) in a separate log.
3. Keep an evolving narrative report to synthesize, argue, and think “out loud.” Revise as you go until, at the end, it contains your final conclusions from that block of research.

Tip #2: “Teach yourself”: Make your own locality or research guides for places or sources that are important to you. The best way to learn something is to teach it—including to yourself. Your locality or research guide can (and should) feed off of your research logs and reports.



F503

Jill Morelli, CG, CGL, Shamele Jordon, Angela Packer McGhie, CG, FUGA, Mahina Oshie, Robert Raymond, Lori Samuelson, MA, MEEd, Karen Stanbary, MA, LCSW, CG, Evan Wilson
Rapid Roots: Seven Share their Secrets in Seven Minutes

Tip #3: “Share the love”: Turn your work into products that others can enjoy and use! Examples: abstracts or transcriptions, research /locality guides or notes, case studies, compiled genealogies, or looser and more “creative” forms of writing. We do so much detailed work on specific records, places, and people—so why not actually make our work useful to other people?

Angela Packer McGhie

Tip #1: Conduct careful research to accurately reconstruct your family tree. Don’t rush. Don’t make assumptions. Don’t trust information without a reliable source. Analyze records for accuracy. Correlate information from various sources to ensure reliability. Seek sufficient evidence to determine relationships and identify parents.

Tip #2: Write your ancestors’ stories.

Our family members and descendants love to read compelling stories of their ancestors. Use your skills to identify and preserve their history for future generations. Seek stories and pull information from documents to write an interesting history for each ancestor.

Tip #3: Thoroughly document the details to create a reliable history.

Work to document the information in the stories with genealogical records. Fill in gaps with records likely to provide details of the lives of individuals to add interest and context about the ancestor, their family, and the community they lived in.

Our experts have shared a total of 33 tips-- all to make you a better genealogist! Thanks for attending and I hope you enjoyed this new (to NGS) format. Let us know.

#NGS2024GEN

[Search](#) | [Learn](#) | [Teach](#)



F504

Judy Nimer Muhn

The Five Largest: Researching the Biggest Indigenous Tribes of the US

The Five Largest: Researching the Biggest Indigenous Tribes of the U.S.



Judy Nimer Muhn, Lineage Journeys

<http://www.LineageJourneys.com>

judynmuhn@gmail.com

While this session will review and provide guidance on basic methods of the rich resources of information for Native/First Nations peoples, this session will not discuss the tribal enrollment process. Most tribes have this information on official websites.

Remember these strategies and keys for Native/First Nations research:

- Do genealogy as you would do it for any family – begin with yourself and move backward in time, documenting everything as you go.
- Research all family members and document their lives through birth, marriage, death and census records.
- Information is only as accurate as those sharing wanted it to be – information was given voluntarily by someone in the household, but they may have had a reason to “fabricate” information.
- Records may give English names and Native names – it is fortunate when you can obtain records that have BOTH names together, to help in confirming how to track families and members.
- Children in the household may be the children of either the father or mother, and maybe not both.
- Indexes are secondary records – check them against the original records.
- Look at the whole neighborhood for the families living nearby – these could be helpful in marriages, info about the ancestral home and ethnic groups in the area (a potential clue if you don’t know the family’s origins).
- Find your family in any rosters or lists, and track them through time including their siblings. If you can’t find your direct ancestor by name, look for former neighbors, siblings, etc.



F504

Judy Nimer Muhn

The Five Largest: Researching the Biggest Indigenous Tribes of the US

Specific to Native/First Nations Peoples:

- Geography is key – tracking where and when your ancestors were in a region, can narrow down the tribal connections and relationships that will guide your research.
- Records specific to tribal affiliation – allotments, rolls, land records, and reservation connections – are easier to find IF you know the tribe!
- Learn about naming patterns, family relationships, clans or other groupings.
- Occupations can sometimes give hints about tribal affiliations – remember to use FAN (friends, acquaintances, neighbors) too.

Largest Tribes:

As of the 2010 Census –

Navajo/Dine'è or just Diné	308,013
Cherokee/Aniyunwiya	285,476
Sioux/Lakota-Dakota-Nakota	131,048
Chippewa/Ojibwa-Ojibway-Anishinaabe	115,859
Choctaw/Chahta	88,913

Online Genealogy Records for Native American tribal groups:

https://www.familysearch.org/wiki/en/American_Indian_Online_Genealogy_Records

List of federally recognized tribes:

<https://www.federalregister.gov/documents/2020/01/30/2020-01707/indian-entities-recognized-by-and-eligible-to-receive-services-from-the-united-states-bureau-of>

Navajo Nations map: <https://www.familysearch.org/wiki/en/index.php?curid=98488>

Cherokee map and history : <http://wsharing.com/WScherokeeTimeline.htm>

Lakota map: <http://www.snowwowl.com/peoplesioux.html>

Chippewa/Anishinaabe map: <https://tinyurl.com/r374bxq>

Choctaw map: <https://tinyurl.com/vb2ub5k>

Websites:

- Tribal Migration, Library of Congress
(http://www.loc.gov/teachers/classroommaterials/presentationsandactivities/presentations/immigration/native_american.html) - Outstanding visual representation of

#NGS2024GEN



F504

Judy Nimer Muhn

The Five Largest: Researching the Biggest Indigenous Tribes of the US

original lands of tribal peoples, with information on the forced removals and patterns of migrations of tribes.

- OHIO – Land cessations: (<https://www.loc.gov/resource/g3701em.gct00002/?sp=49>)
- Oklahoma Historical Society (<http://www.okhistory.org>) – Indexed records especially of the Five Civilized Tribes (Cherokee, Chickasaw, Choctaw, Creek and Seminole) but also other tribal groups.
- Vital Records – Native American Directory
<http://www.daddezio.com/records/room/indian.html>
This web site offers a search feature by tribe. Each tribal section contains contact information for genealogical records or information and links to online and other resources (some are advertised as free and some are advertised for sale).
- The Genealogy Page – National Archives and Record Administration (NARA)
<https://www.archives.gov/research/native-americans> This section contains links to web sites of census rolls, military records, photos and more. NARA also provides publications for sale and information about workshops offered at various regional locations.

INDIAN or TRIBAL ROLLS:

National Archives, Bureau of Indian Affairs, Rolls:

<https://www.archives.gov/research/native-americans/rolls> There are many “rolls” or census records of native people in the United States (Baker, Guion Miller, Kern-Clifton, Roblin, Wallace, etc.)

Baker Roll: <https://www.archives.gov/research/native-americans/rolls/baker-roll.html>

Covering 1924-1929 for the Eastern Cherokee, earlier rolls were combined to create these rolls. Earlier rolls include the 1835 Census for Cherokees living east of the Mississippi, 1884 Hester Roll (which also appears on Fold3.com), the 1907 Council Roll, 1908 Churchill Roll and the 1909 Guion Mill Roll.

Dawes Rolls:

<https://www.archives.gov/research/native-americans/dawes/tutorial/intro.html>

Tribal enrollment between 1899 and 1907 - Five Civilized Tribes who resided in the Indian Territory, which later became the eastern portion of Oklahoma. The Five Civilized Tribes consist of the Cherokee, Choctaw, Creek, Seminole and Chickasaw Indians.



F504

Judy Nimer Muhn

The Five Largest: Researching the Biggest Indigenous Tribes of the US

Guion-Miller Roll: Compiled from the Eastern Cherokee claims of 1905, these records were compiled to determine who received a portion of the \$1M appropriation from the U.S. Court of Claims. A free index is available at NARA

(<https://www.archives.gov/research/nativeamericans/rolls/guion-miller.html#list>) and the lists appear on both Fold3.com and Ancestry.com.

Kern-Clifton Roll from 1897, of Cherokee Freedmen are also potentially available but the NARA website is currently not functioning (check back on the NARA site, rolls list to determine if the link is corrected).

AND there are individual tribal enrollment records, held by Tribal Enrollment Offices, that may or may not be available for public review (they are most often NOT online) and establish who is able to receive benefits and services from a given tribal government. Efforts are also underway at NARA to digitize the 377 Native Treaties (in news released in 2018– see announcement here: (<https://www.archives.gov/news/articles/efforts-begin-to-digitize-377-native-american-treaties?fbclid=IwAR2sD6SpimGAM274rx3DhrOhvge0FK8ePRuVJ3zr-5Z7RCdGfN4SlgMYXew>))

Tribal Leaders Directory – This site guides you to the people, addresses and phone numbers that may be helpful in connecting with tribal offices.

<https://www.bia.gov/tribal-leadersdirectory>

Contact Judy for a list of books that appropriately offer information about tribal groups.

©Judy Nimer Muhn, Lineage Journeys 2024 All rights reserved.



F505

David Allen Lambert

Virtual Family Reunions: Using Technology to Host and Plan Your Event and Conduct Interviews

Virtual Family Reunions: Using Technology to Host and Plan your event and conduct Interviews.

David Allen Lambert, NEHGS Chief Genealogist, dalambert@nehgs.org

F505 – May 17, 2024

Step # 1 – Gathering your Online family members.

1. Collecting e-mail addresses & social media contacts.
2. Using www.facebook.com for a family reunion
 - Do I create a Public or Private account?
 - Assigning Administrators
 - Do I create a Public or Private Group?
 - Inviting family members
 - Online “Group” Chats
3. Using the “Skype” application for virtual family reunions.

Step # 2 – Scheduling the Family Reunion.

1. Planning a reunion with a “Online Family Reunion” simulcast.
2. Recording your video for submission for Facebook.com or Youtube.com

Step # 3 – Beyond the Reunion.

1. How to maintain interest in your “family” group beyond the reunion.
2. Sharing genealogical data and obtaining genealogical updates quicker.
3. Creating a genealogical project to unite family members across the world.

Websites

Creating a “Group” on Facebook.com:

https://www.facebook.com/help/167970719931213?helpref=about_content

Downloading “Skype”: <https://www.skype.com/en/get-skype/download-skype-for-desktop/>

Downloading “Zoom”: <https://zoom.us/>



S101

Rebecca Whitman Koford, CG, CGL

Writing is Researching: How Narrative & Report Writing Improves Analysis

WRITING IS RESEARCHING: HOW NARRATIVE & REPORT WRITING IMPROVES ANALYSIS



Rebecca Whitman Koford, CG®, CGLSM | rwk.genealogy@gmail.com
National Genealogical Society Family History Conference | May 2024

Approaching Analytical Writing—Step-by-Step

The Genealogical Proof Standard (GPS) is a 5-level checklist measuring a proposed solution to a genealogical question of identity, relationship, event, or situation. The GPS challenges researchers to meet high standards of reliability to prove their conclusions.¹ The last point in the GPS seems to be the one that researchers feel the least confident about: writing the conclusion.

“A first step in getting started is to shift mental gears... stop thinking about your family history as a research project with many clues still to follow and start thinking about it as a *writing project*.”

- Penelope L. Stratton & Henry Hoff, CG, FASG, *Guide to Genealogical Writing*

Why Write While Researching?

What is NARRATIVE? For family history it does not need to only be biographies. It is report writing, article-style writing, and proof argument writing as well. Narrative is how one writes to present a series of events, relationships, and the context of events and analysis to its logical conclusion. Writing one’s research as it progresses is an intentional and purposeful way to analyze each piece of evidence, relationship, or event. The advantages of writing reach all types of learners because it actively engages the researcher in multiple processes of investigation. The researcher can choose the method of analysis to apply that is best for both their own style and the purposes of the research problem. Consider these other benefits as well.

- Writing while researching puts the focus on analysis.
- Writing forces exploration of the context of each record, location, related laws, etc.
- Writing demands explanations for evidence inconsistencies—many of which may not immediately appear to be in conflict (when only running around unorganized in the researcher’s head).
- Writing while researching is a process of laying out the evidence to move the pieces around, match them up, see what may be missing, and examine what steps to take next.
- Writing is more easily shared than verbal explanations with another researcher.
- Writing is not only sentences and paragraphs—it encompasses tables, graphics, diagrams, maps, and comparative charts as well. Let the tables do the talking, too.

“The first draft is just you telling yourself the story.”

- Sir Terry Pratchett

¹ References to the GPS and any of the Standards are found in Board for Certification of Genealogists, *Genealogy Standards*, 2nd edition rev., 2021. See Bibliography.



S101

Rebecca Whitman Koford, CG, CGL

Writing is Researching: How Narrative & Report Writing Improves Analysis

Start a Re-start

The ancestor’s known BACKGROUND INFORMATION and a statement of the RESEARCH QUESTION the first point to write from. Try this: from whatever point one is in the research—STOP. Determine that this is now the “beginning” of the project. Write what is currently known about the project, the ancestor, including known relatives impacting this project, and any of the current facts. WRITE ANY WAY THAT GETS IT ON THE PAGE, but to analyze it properly, each stated fact must include a full CITATION. For best results, use a recognized formal style to introduce an ancestral couple, such as the Register System or NGSQ; see *Numbering Your Genealogy*.

Organizing is Writing

RESEARCH LOGS are writing. Use whatever type makes you comfortable, as long as you are utilizing the habit of writing all your research results: the good, the bad, and the frustrating negative results. A research log is a working document to sort, organize, and abstract with, but not a final product. See the bibliography for suggestions on how to begin. Multiple types of logs may be used in concert, depending on the project, such as a main log, plus logs specific for deeds, military pension records, DNA, or other large record sets. Coordinate your research log(s) with a constantly updated TIMELINE.

Timeline and then Timeline Again and then Again

TIMELINES are the first step to building an OUTLINE for your narrative or report. Put it on a separate page from your narrative. I prefer to footnote my source citations in the last column. Create a simple timeline with these columns:

- Year or Date of event
- Location of event
- Event & people involved
- Source evaluation notes

Take everything you know about the ancestor and apply it to the timeline—residences, censuses, marriage(s), children’s births, occupations, military service, local tragedies & epidemics, church attendance, land purchases, city directory entries, court appearances, migrations, deaths, etc. Update this consistently.

Timeline to Outline

OUTLINES are a simple matter of putting things from the timeline into sentences. Start writing very basic sentences describing each event from the timeline. Include your thoughts, ideas, wandering theories, missing pieces, questions, information about context on the document or source’s creation and anything else that was a push-pull factor that impelled the ancestor to be involved in this document. Example:

Timeline entry:

Date	Location	Event & People	Source Evaluation
5 Oct 1847	Oath of Identity at Springfield, Greene Co., MO	John C. McDaniel Mexican War Discharge. Stated b. in Grainger Co., TN, age 26 [calc. b. 1821], 6’ tall, dark complexion, blue eyes, dark hair, occ. Farmer. Served 8 May 1847–5 Oct 1847; 2 nd Lieut, Co. G, 3 rd MO Mtd. Inf. with Capt. Boake. Discharged at Santa Fe, NM.	Original discharge signed by commanding officer. Reverse “Oath of Identity” cert. 7 Nov 1848. ²

Outline sentence:

When John enlisted on 8 May 1847 for the Mexican War with the 3rd Mounted Missouri Infantry, he was 26 years old and a farmer, possibly in or around the Springfield area of Greene County. His “oath of identity” stated he had

² Original Discharge, John C. McDaniel (2nd Lieut., Co. G., 3rd Mounted Inf. Regt. (Rall’s), Missouri Volunteers, Mexican War), bounty land warrant application file 47782; Case Files of Pension and Bounty Land Applications Based on Service between 1812 and 1855; Pension and Bounty Land Warrant Application Files, 1800–1960; Department of Veterans Affairs, Record Group 15; National Archives (NARA), Washington, D.C.



S101

Rebecca Whitman Koford, CG, CGL

Writing is Researching: How Narrative & Report Writing Improves Analysis

been born in Grainger County, Tennessee. Given the age and date of enlistment, his calculated birth was about 1821. He was honorably discharged on the 5th of October the same year from Santa Fe, New Mexico.²

Writing for Analysis

This is one of the times to say that writing really is a bit miraculous. It is hard work, tedious, and a constant effort, but much like a piece of artwork, writing is molded and sculpted until suddenly and seemingly amazingly, the page of text opens up the researcher’s understanding in new and unforeseen ways. This can only happen with consistent application of effort. Consider the outline sentence above with the next one, done while writing during research.

Timeline entry:

Table with 4 columns: Date, Location, Event & People, Source Evaluation. Row 1: 11 Mar 1903, Living in Valley Park, St. Louis Co., MO, John McDaniel Bounty Land Claim Application...

Outline sentence:

In the same file with the original discharge paper for the Bounty Land Application is a 1903 application from “John McDaniel” of St. Louis County, Missouri, who claimed to be the same man, but the facts given by the 1903 claimant vary significantly from the 1848 discharge paper. Later papers in this file denied the 1903 application and said that the bounty land had been issued earlier. [conflicts in red]

Comparison table with 3 columns: Stated Facts, 1847-1848 Discharge, 1903 Bounty Land Application. Rows include Enlistment Date, Enlistment Place, Discharge Date, Discharge Place, Rank, Co. & Captain, Regiment, Age at Enlistment, Calculated birth date, Physical Description, Occupation.

– BLM GLO online shows that John C. McDaniel’s patent no. 47782 was patented by James Brown in 1851. Get the Surrendered Warrant and compare signatures. Also, the family says that John died in 1863! What’s he doing alive in 1903? Is there a pension – referred to in the BL application of 1903? Go back to NARA and pull it. Men of the same name? How did it happen? Jefferson Barracks is at the top NE of MO, but 3rd Regiment enlisted near southern border of MO. Will have to re-write this section.

Writing Suggestions

Writing is not always about just the ancestors. Use this opportunity to write about things, places, peoples, events, laws, and anything else that affect the ancestor’s situation. Here are some other writing ideas.

³ Bounty Land Claim Application, John McDaniel (2nd Lieut., Co. G., 3rd Mounted Inf. Regt. (Rall’s), Missouri Volunteers, Mexican War), bounty land warrant application file 47782; Case Files of Pension and Bounty Land Applications...; Record Group 15; NARA.

#NGS2024GEN



S101

Rebecca Whitman Koford, CG, CGL

Writing is Researching: How Narrative & Report Writing Improves Analysis

Jurisdictional Analysis

Create a locality study for the area: repositories, record loss, geography, culture... Use *FamilySearch Wiki*.

Document Analysis

What may be behind the creation of this document or source? What laws rule it, or do they change? Does it link to related sources?

Event Analysis

Even "typical" events like death may have rituals which need exploration. Investigate more than the superficial implications.

How Do I Measure My Writing?

An old adage my great-aunt would tell me was to dress for the job I wanted, not for the job I had. Turning that around a bit, we can read articles at the level of writing we want to achieve, even before it is the level of writing we have yet mastered. Read one and diagram it out for its parts: background study, levels of evidence, where conflicts are introduced/resolved, and how evidence is presented (tables, proof arguments, etc.)

How Long Will It Take Me to Achieve Mastery?

At the age of fifteen, I had an opportunity to meet the author Ray Bradbury for about 30 seconds. I asked how to become a better writer. Before being pushed along the line by the waiting teens behind me, he said something to the effect, "Write every day, kid. Every day." My fifteen-year-old self was hoping for something a bit more magical (and simple) than what amounted to "hard work." Writing is a challenge, but oh so rewarding!

Bibliography

Board for Certification of Genealogists. *Genealogy Standards*, 2nd edition, revised. Nashville, Tennessee: Ancestry.com, 2021.

Curran, Joan F., Crane, Madilyn Coen, and Wray, John H. *Numbering Your Genealogy: Basic Systems, Complex Families, and International Kin*. Arlington, Virginia: National Genealogical Society, 2008 edition, edited by Elizabeth Shown Mills. For purchase at <https://www.ngsgenealogy.org/numbering-genealogy/>.

Elder, Diana. "Research Plans, Source Citations, and Research Logs, Oh My!" Lecture. RootsTech 2020, <https://www.familysearch.org/en/rootstech/session/research-plans-source-citations-and-research-logs-oh-my?lang=eng>.

Jones, Thomas W. *Mastering Genealogical Proof*. Arlington, Virginia: National Genealogical Society, 2013. NGS Special Publication no. 107.

Koford, Rebecca Whitman. "Research Logs: A Variety of Styles to Suit Your Project." Lecture in 3 parts. RootsTech 2021, <https://www.familysearch.org/en/rootstech/session/research-logs-a-variety-of-styles-to-suit-your-project-part-1-of-3>.

Peters, Nancy A. "Reporting on Research: Standards Encourage Better Communication." Lecture, 16 March 2021. *Legacy Family Tree Webinars*, <https://familytreewebinars.com/webinar/reporting-on-research-standards-encourage-better-communication>.

Mills, Elizabeth Shown, ed. *Professional Genealogy: Preparation, Practice & Standards*. Baltimore: Genealogical Publishing Company, 2018. See especially chapters 12, 13, 18, 20, and 22.

Ross-Larsen, Bruce. *Edit Yourself: A Manual for Everyone Who Works with Words*. New York City: W.W. Norton & Company, 1996.

Stratton, Penelope L. and Hoff, Henry B. *Guide to Genealogical Writing: How to Write and Publish Your Family History*, 3rd edition. Boston: New England Historic Genealogical Society, 2014.



S102

Ari Wilkins
Sources for Researching Rural Ancestors

SOURCES FOR RESEARCHING RURAL ANCESTORS

Ari Wilkins
awilkins@blackgenesis.com
All rights reserved. ©

- I. Church and cemetery records
 - A. WPA Historical Records Survey – inventories of church records
 - B. WPA Historical Records Survey – burial listing in cemeteries
- II. Court records
 - A. WPA Historical Records Survey – inventories of records found in county courthouses
- III. Censuses
 - A. Federal
 1. Population
 2. Agricultural
 - B. State
 - C. Educable censuses
- IV. Gazetteers
- V. Newspapers
 - A. Mainstream newspapers with special columns
 - B. Local newspapers
 - C. Ethnic newspapers
- VI. Property records
 - A. Deeds
 - B. Homestead records

Homestead Records – The Homestead Act of 1862 allowed any American to submit a claim for up to 160 acres of government land. After homesteading the land, making improvements, and residing on the land for five years, the settler could apply for a permanent deed of title.

Any person who was a head of household, widow, single person over the age of twenty-one) could apply for a homestead. This included all U.S. citizens – including women, African Americans, freed slaves, and immigrants.) Land for homesteading was available in public domain states.



S102

Ari Wilkins
Sources for Researching Rural Ancestors

The federal land (or public domain) states are:

Alabama	Iowa	New Mexico
Alaska	Kansas	North Dakota
Arizona	Louisiana	Ohio
Arkansas	Michigan	Oklahoma
California	Minnesota	Oregon
Colorado	Mississippi	South Dakota
Florida	Missouri	Utah
Idaho	Montana	Washington
Illinois	Nebraska	Wisconsin
Indiana	Nevada	Wyoming

Order a land entry case file from the National Archives.

C. WPA Historical Records Survey – Rural Property Inventory

VII. Maps

- A. Enumeration district maps (1880-1950)
- B. Postal route maps
- C. Cadastral maps and landowner plat maps
- D. Railroad maps
- E. Topographic maps
- F. Highway culture maps

VIII. Rural Directories

- A. *The Farm Journal Illustrated Rural Directory of ...* (found in OH, NY, MI, WI, and IA; PA and NJ have similar publications)
- B. *Prairie Farmers Directory of ...* (found in IN, IL, WI)

IX. Manuscript Collections

X. Freedmen's Bureau Records

XI. Mug Books (also known as Vanity or Heritage books)

XII. Rural Farm Security Administration (Record Group 96)



BIBLIOGRAPHY

As of February 2024

- Agriculture and Rural Life Newspapers. Accessed 25 January 2024.
<https://diglib.auburn.edu/collections/agpapers/>.
- Alt, Mary Rasch. "Area Notes: Archives of Michigan: Works Progress Administration (WPA) Rural Property Inventory." *Michigana* 62, no. 3 (2016): 109–11.
- An Illustrated Historical Atlas Map, Jackson County, Mo.: Carefully Compiled from Examinations and Surveys*. Independence, MO: Jackson County Historical Society, 1976.
- Boyd, Gregory A, *Family Maps with Homesteads, Roads, Waterways, Towns, Cemeteries, Railroads and More*, Book series (Norman, Oklahoma: Arphax Publishing Company).
- Bushman, Richard L. *The American Farmer in the Eighteenth Century: A Social and Cultural History*. New Haven, CT: Yale University Press, 2018.
- "Chronicling America: Library of Congress." Accessed 25 January 2024.
<https://chroniclingamerica.loc.gov/>.
- "Collections with Maps." The Library of Congress. Accessed 27 January 2024.
<https://www.loc.gov/maps/collections/>.
- "David Rumsey Map Collection." Accessed 27 January 2024. <https://www.davidrumsey.com/>.
- Garrity, Christopher. "Get Maps." USGS Topoview. Accessed 30 January 2024.
<https://ngmdb.usgs.gov/topoview/viewer/#4/40.00/-100.00>.
- Godfrey, Marie H. *Rural Land Owners of Barbour County, Alabama, 1851*. Greenville, SC: Southern Historical Press, 1990.
- History Geo, "Where Historical Maps and Family History Meet!" Accessed 27 January 2024.
<https://www.historygeo.com/>.
- Hone, E. Wade. "Records Generated by Federal Lands - Homestead Records." Essay. In *Land & Property Research in the United States*, 1st ed., 140–46. Provo, UT: The Generations Network, 1997.
- Kovatch, Marilyn. "Cuyahoga Falls Post Office Summit County, Ohio, Rural Mail Directory, 1905." *Ohio Records and Pioneer Families* 36, no. 3 (1995): 82–86.



S102

Ari Wilkins
Sources for Researching Rural Ancestors

Luebking, Sandra Hargreaves. "Land Records - Public Domain States." In *The Source: A Guidebook to American Genealogy*, 3rd ed., 439–48. Provo, UT: The Generations Network, 2006. "North Carolina's Digital Heritage." DigitalNC. Accessed 25 January 2024. <https://www.digitalnc.org/newspapers/>.

"Post Office Reports of Site Locations, 1837–1950." National Archives and Records Administration. Accessed 3 February 2024. <https://www.archives.gov/research/post-offices/locations-1837-1950.html>.

Puetz, C. J. *North Carolina County Maps*. Lyndon Station, WI: C.J. Puetz, 1996.

Records of the Farmers Home Administration. Record Group 96. National Archives, Washington, D.C. <https://www.archives.gov/research/guide-fed-records/groups/096.html#96.4.4>

Search - BLM GLO Records. Accessed 19 January 2024. <https://gloreports.blm.gov/search/default.aspx>.

"Southern Historical Collection - UNC-Chapel Hill Libraries." University of North Carolina at Chapel Hill, 19 August 2022. <https://library.unc.edu/wilson/shc/>.

"United States Enumeration District Maps for the Twelfth through the Sixteenth US Censuses, 1900-1940." FamilySearch.org. Accessed 30 January 2024. <https://www.familysearch.org/search/collection/2329948>.

Using Maps in Genealogy - USGS Publications Repository. Accessed 4 February 2024. <https://pubs.usgs.gov/fs/2002/0099/report.pdf>.

Verne, J. "Country Stores Were Important to the Survival of Rural Kentucky." *The Kentucky Explorer* 19, no. 5 (October 2004): 30–31.

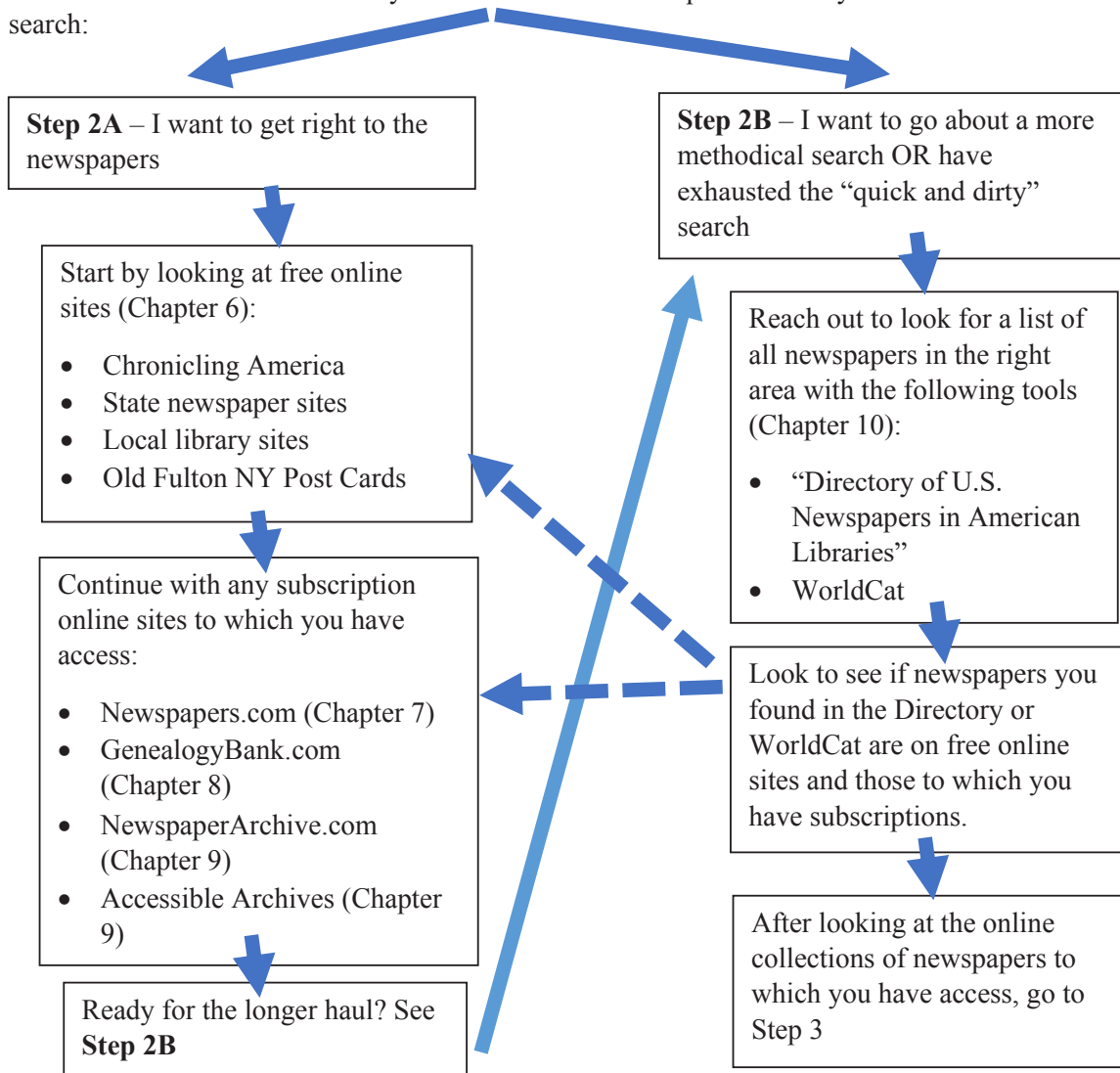


Method to the Madness: Investigating Every Possible Newspaper for Your Ancestors

James M. Beidler jamesmbeidler@gmail.com

Note: Chapter references are to *The Family Tree Historical Newspapers Guide*

Step 1 – The starting point for your research is formulating a specific goal and then using “time and place” – the time frame of your research and the geographic place in which it took place (Chapter 1) – to determine what resources are best. Also, look at all that newspapers covered (Chapter 2) as well as focusing on chronology (Chapter 3) and recordings of death (Chapter 4). You also have to decide whether you want to start with a “quick and dirty” or more methodical search:



#NGS2024GEN

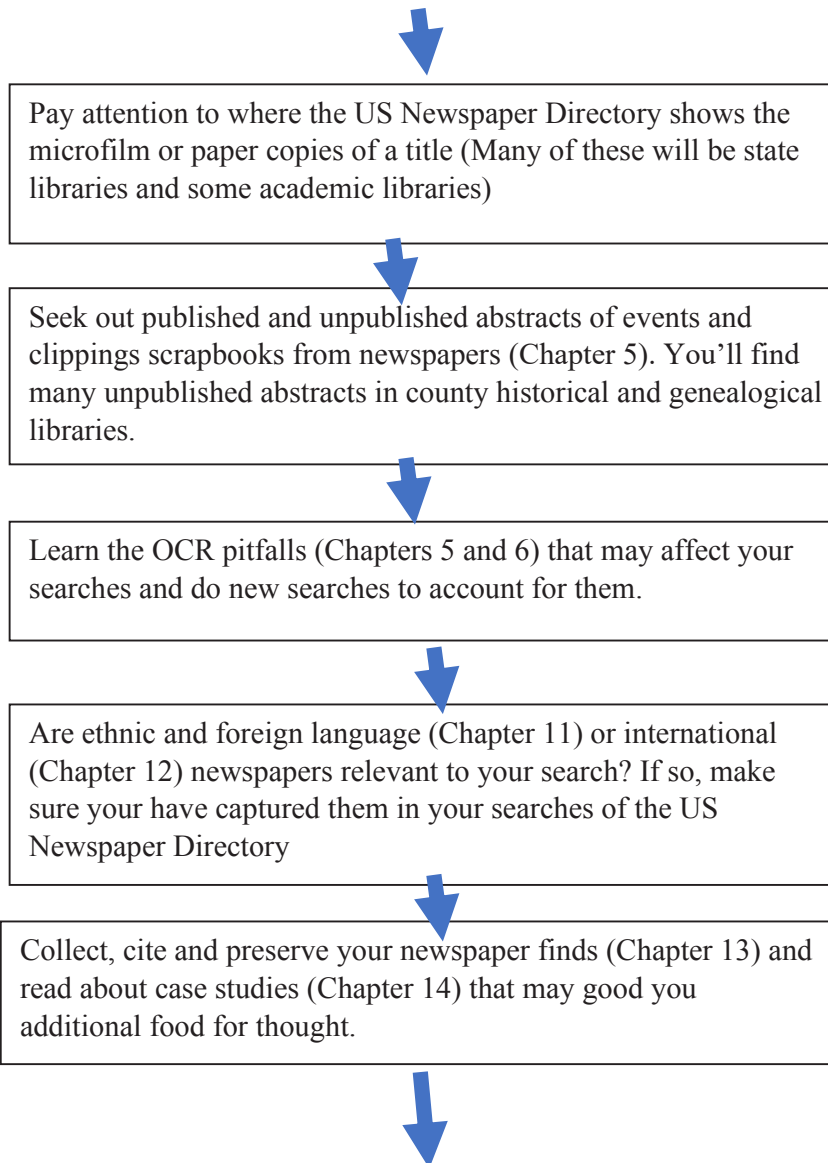


S103

James M. Beidler

Method to the Madness: Investigating Every Possible Newspaper for Your Ancestors

Step 3 – Once you’ve exhausted all the online collections of newspapers, you’re not done by a longshot. Many newspapers are not digitized or the OCR that makes them searchable has defects. Your flow becomes one of going through additional possible sources of newspapers.



Step 4 – Still looking for more? (This is not a bad thing!) Go back to your original premises for time and place – 1) think about expanding the time period to account for “this day in history” other “look back” articles and 2) think about expanding the geographic area to include the birthplace or former residences of the person you’re researching or to account for other newspapers that may have reported on an event.

#NGS2024GEN



S103

James M. Beidler

Method to the Madness: Investigating Every Possible Newspaper for Your Ancestors

Major newspaper websites

Free sites with digitized newspapers

Chronicling America: Historic American Newspapers

<https://www.loc.gov/chroniclingamerica/index.html>

Google News Archive <https://news.google.com/newspapers>

Old Fulton NY Postcards <https://fultonhistory.com/Fulton.html>

For-pay subscription sites for individuals

Accessible Archives <https://www.accessible.com/accessible/index.html>

Ancestry.com <https://www.ancestry.com>

Find My Past <https://www.findmypast.com>

Fold3.com <https://www.fold3.com>

NewsBank Inc. – “America’s GenealogyBank” <https://genealogybank.com>

Newspaper Archive <https://newspaperarchive.com>

Newspapers.com <http://www.newspapers.com>

Subscription sites for libraries

ProQuest Historical Newspapers <http://www.proquest.com/products-services>

Sites that list websites relating to newspapers

The Ancestor Hunt <http://www.theancestorhunt.com/newspaper-research-links.html>

CanGenealogy <http://cangenealogy.com/newspapers.html>

Cyndi’s List of Genealogy Sites on the Internet <https://cyndistlist.com>

Elephind.com <http://elephind.com>

The Online Historical Newspapers Site <http://sites.google.com/site/onlinenewspapersite>

Small Town Newspapers <http://ww.smalltownpapers.com>

Sites with obituaries

Find A Grave <http://findagrave.com>

Legacy.com <http://www.legacy.com>

Obitfinder.com <http://obitfinder.com>

Obitsarchive.com <http://obitsarchive.com>



S103

James M. Beidler

Method to the Madness: Investigating Every Possible Newspaper for Your Ancestors

Bibliography

General

Beidler, James M. *The Family Tree Historical Newspapers Guide: How to Find Your Ancestors in Archived Newspapers* (Family Tree Books, 2018).

Breland, Claudia C. *Searching for Your Ancestors in Historic Newspapers* (Gig Harbor, WA: author, 2014).

Cooke, Lisa Louise. *How to Find Your Family History in Newspapers* (Genealogy Gems Publications, 2012).

Szucs, Loretto Dennis and James L. Hansen. "Newspapers" chapter, *The Source*, Third Edition (Ancestry, 2006).

Taplin, Cari A. "Obituaries in Genealogy: A Research Tool" (Legacy QuickGuide series, 2014).

Tarr, Julie. "Using Historical Newspapers for Genealogy Research" (Legacy QuickGuide series, 2012).

Specialized / Ethnic

Arndt, Karl J.R. and Mary E. Olsen. *The German Language Press of the Americas*, Third Edition, 3 volumes (Munich: K.G Saur, 1976-1980).

Danky, James P. and Maureen E. Hady. *African-American Newspapers and Periodicals: A National Bibliography* (Harvard University Press, 1998).

Danky, James P., Maureen E. Hady and Ann Bowles. *Native American Periodicals and Newspapers, 1828-1982: Bibliography, Publishing Record, and Holdings* compiled (Greenwood Press, 1984).

Hady, Maureen E. and James P. Danky. *Asian-American Periodicals and Newspapers: A Union List of Holdings in the Library of the State Historical Society of Wisconsin and the Libraries of the University of Wisconsin-Madison* (Wisconsin Historical Society, 1979).

Pinnick, Timothy N. *Finding and Using African American Newspapers* (Gregarth Publishing Company, 2008).

Reynolds, Lloyd G. and Charles C. Killingsworth. *Trade Union Publications, 1850-1941* (Johns Hopkins Press, 1944).

Strache, Neil E. and James P. Danky. *Hispanic Americans in the United States: A Union List of Periodicals and Newspapers Held by the Library of the State Historical Society of Wisconsin and the Libraries of the University of Wisconsin-Madison* (Wisconsin Historical Society, 1979).

Copyright © 2024 James M. Beidler



Civil Registrations: Digging Deeper into the Lives of Your Mexican Ancestors

Colleen Robledo Greene, MLIS

Blog: www.colleengreene.com • Email: colleen.e.greene@gmail.com

Facebook Page: <https://bit.ly/3UANKIt>

© 2024 Colleen Greene, MLIS • All links are current as of 4 February 2024.

Mexico implemented federal civil registration (*registro civil*) as its official vital record system **in the 1860s**. It replaced Catholic parish registers as the legal vital record system. The records are created and kept at the *municipio* (county) level. Mexico's civil legal code (*el código civil*) dictates the type of civil registrations, who creates these, how they should be organized, and the type of information reported in the records.

Types of Records & Information Contained

Key dates impacting the records:

- (1821) Mexican Independence
- (1859) Civil Registration began
- (1867) Civil Registration became enforced
- (1917) Civil divorce became legal

Key terms for interpreting relationships:

- *Hijo/a legítimo/a* (Legitimate child, parents married civilly and/or in the church)
- *Hijo/a natural* (Illegitimate child, parents not married civilly or in the church, even if they legally could marry)
- *Abuelos/as paternos/as & Abuelos/as maternos/as* (paternal & maternal grandparents)
- *Viudola* (widower/widow)
- *Padrinos/as* (godparents, also called sponsors)

Key terms for interpreting place name references:

- *Natural de* (born in/ native of)
- *Originario de* (originally from / native of / born in)
- *Vecino/a de* (legal resident of)



S104

Colleen Robledo Greene, MLIS
Civil Registrations: Digging Deeper into the Lives of Your Mexican Ancestors

The contemporary dual surname system became standardized and codified with the adoption of the civil registration system.

Birth Registrations (*Nacimientos*)

Information usually included:

- Date and place of registration (not always the same date and place of birth)
- Name, age, and place of residence of the informant (often the father)
- Names, gender, date, and place of birth of the child
- If the child was born legitimate or illegitimate
- Names, ages, and place of residence of the parents (unless a father is not named)
- Names, age, and place of residents of the witnesses

Information sometimes included:

- A stated relationship between the informant and the child
- Occupation of the father
- Age and place of birth of the parents
- Ethnicity of the parents (caste system abolished after Independence)
- Names of grandparents; whether living or deceased; ages and place of residence
- If the child was part of a multiple birth
- If the child was born dead (still look for a death registration)

Situations to watch for:

- Any margin notes
- Delayed birth registrations (sometimes self-reported)
- References to births that occurred in the U.S. or other countries
- Registering the births of multiple children at a single time

Marriage Registrations (*Matrimonios*)

There are two main types of records:

- **Marriage Presentation (*Presentación*):** The declaration of intent to marry, which usually takes place about 4 weeks before the ceremony. This record contains the most genealogical information of the two main record types.
- **Marriage Ceremony (*Matrimonio*) Record:** The actual marriage event, which usually takes place about 4 weeks after the presentation.

Information usually included between the two books:

- Date and place of registration.



S104

Colleen Robledo Greene, MLIS

Civil Registrations: Digging Deeper into the Lives of Your Mexican Ancestors

- Names, ages, places of birth & residence for groom and bride
- If the bride and groom were single, or widowed & previously married
- Occupation of the groom
- If the groom and bride were born legitimate or illegitimate
- Names of parents; whether living or deceased; ages and place of residence
- Names, age, and place of residents of the witnesses

Information sometimes included between the two books:

- Place of birth for the parents, and an occupation for the father
- Names of grandparents; whether living or deceased; ages and place of residence
- The name of a previous spouse, and when they died

Situations to watch for:

- References to an earlier church marriage (go look for that parish record)
- References to an earlier marriage between the two in another country

Death Registrations (*Defunciones*)

Information usually included:

- Date and place of registration (not always the same date and place of birth)
- Names, gender, age, date, place, and cause of death of the individual
- Place of residence and birth of the decedent
- Names of parents; whether living or deceased; ages and place of residence
- Name of a spouse, and if they are a surviving widow/er or already deceased

Information sometimes included:

- Relationship of the informant to the decedent
- Profession of the decedent
- Date and place of burial or interment
- Names of surviving children
- If the individual left a will (*testamento*)
- Place of residence and birth of the parents and/or spouse

Locating the Records Online

Ancestry

The civil registrations collection is available in a World Explorer membership with a personal Ancestry.com subscription, and through Ancestry Library Edition at



S104

Colleen Robledo Greene, MLIS
Civil Registrations: Digging Deeper into the Lives of Your Mexican Ancestors

subscribing libraries. I prefer to start with Ancestry for civil registration, because *they provide the fully indexed and searchable collection* with digitized images attached. Go ahead and try the regular search boxes. However, the card catalog provides better precision.

- **Search > Card Catalog**
- **Title:** Use the Mexican state name and choose the desired civil registration or church database collection

FamilySearch

FamilySearch makes the digitized image copies available to everyone for free. However, the fully indexed (searchable) version, with digitized images attached, is *only accessible with an LDS account or from within a FamilySearch library or affiliate library* (not to general remote access members). Go and try the regular Historical Records Search box, but the catalog provides better precision.

- **Search > Catalog**
- **Place (Mexico):** Use the Mexican state and municipio name
 - Select civil registrations
 - Select the desired record type and range of years

Resources to Learn More

"Civil Registers." Brigham Young University Center for Family History and Genealogy. *BYU Script Tutorial: The Spanish Script Tutorial*, n.d.
<https://script.byu.edu/spanish-handwriting/documents/civil-records/general> : 2024.

FamilySearch Research Wiki. "Mexico Civil Registration."
[familysearch.org/wiki/en/Mexico_Civil_Registration](https://www.familysearch.org/wiki/en/Mexico_Civil_Registration) : 2024.

Greene, Colleen Robledo. "Historical Laws of Mexico," Mexican Genealogy Guide, *Colleen Robledo Greene* [blog]. <https://www.colleengreene.com/mexican-genealogy/historical-laws/> : 2024.

Ryskamp, George & Peggy. *Finding Your Mexican Ancestors: A Beginner's Guide*. Provo, UT: Ancestry Publishing, 2007.

Ryskamp, George & Peggy, and H. Leandro Soria. *Mastering Spanish Handwriting and Documents: 1520–1820*. Baltimore, MD: Genealogical Publishing C., 2023.



S105

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS

Assembling Cryptic Bits of Documentary Evidence and DNA to Answer Major Genealogical Questions

ASSEMBLING CRYPTIC BITS OF DOCUMENTARY EVIDENCE AND DNA TO ANSWER MAJOR GENEALOGICAL QUESTIONS

2024 Helen F. M. Leary Distinguished Lecture Series

Sponsored by the BCG education fund

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS ♦ Tom@JonesResearchServices.com

Description: A case with audience participation demonstrates using at-home research to follow trails of clues from one country to another and assembling the clues into conclusions.

#NGS2024GEN

Background Information: An Undated Note

Transcription of handwritten (cursive) notes on an otherwise blank sheet of paper:

Thomas John Boyd and a brother married 2 Taggart girls, Marie and Jane. Their father was William John Taggart.

Thomas John Boyd married Jane Taggart. They were parents of my father, John Thomas Boyd who was born in New Bern, Indiana 1854. ~~He was their~~ He was their second child (^{1st born} 1852 †) so the family came from Ireland prior to 1854 (1848? fall).

The Taggart and Boyd families lived in Lisnanane, Sand holes, Tully Hogue ~~Count~~ County Tyrone, Ireland.

A widow of Jack Boyd, Margret, lived at the old home place and her address was Margaret Boyd, 47 B. Princess Ave. Monrush, Cookstown, County Tyrone, Northern Ireland. She has remarried and is now Mrs. Joseph Stewart, 115 E. Derry Road Hershey, Pa. 17033

There is a Boyd girl, whose name I do not have, that lives now in the old home where our grandparents lived.

The Boyds originated in Scotland and it is now the 3rd most common name in Scotland.

I am Mabel Boyd Reynolds (Mrs. Gilbert F. Reynolds) daughter of John Thomas Boyd and granddaughter of Thomas John Boyd.

[Added by another writer:] Henry Boyd, older brother of John Thomas Boyd. born 18 January ¹⁸⁵² (over) at cininatti [*sic*], Ohio corner of vine and Buck eye.

Copyright © 2024 by Thomas W. Jones.



S105

Thomas W. Jones, PhD, CG, FASG, FUGA, FNGS

Assembling Cryptic Bits of Documentary Evidence and DNA to Answer Major Genealogical Questions

Genealogical research methods

1. Focus your research on one or a few specific questions.
 - In this case the primary research question is:
Are Mable (Boyd) Reynolds and Jack Boyd related, and if they are related, what is their relationship?
2. Your research should begin with facts in which you have great confidence.
 - Now, at the start of your research to answer the research question, what facts do you have in which you have the greatest confidence?
 - Why are you confident of those facts?
3. Your first research objective, or phase, should be to verify your starting-point information.
 - In this case, what sources would you consult to obtain that verification?
4. By verifying your starting-point information you have completed your first research phase. Your next research phase will build directly on that verified information. Ideally the phase will lead or point you to a research phase that seems likely take you closer to your research question's answer. Each research phase should have a focus. That focus might be a specific sub-question, person, location, record set, relationship, event, or something else.
 - In this case, what would be the focus of your first research phase after verifying your starting point information?
 - In this phase, what would be the first sources you would examine, and what might they tell you?
5. To the extent possible, you will progress systematically from one research phase to the next. You will have few or many research phases.
 - What further research phases do you envision for this project?
 - What further sources might you consult for one of those phases?
6. As your research progresses you will assess the bits of information you encounter for their likely accuracy or inaccuracy. You also will consider how the likely-accurate bits will fit together or point you toward further research and eventually to an answer to your major research questions. You will seek supporting information, but you also will test your assessments by seeking information that would exist if other information you have is incorrect.
 - What would be examples of likely accurate information?
 - What would be examples of likely inaccurate information?

Source material

Jones, Thomas W. *Mastering Genealogical Proof*. Arlington, Va.: National Genealogical Society, 2013. [A textbook with explanations, exercises like this one, and answers at the back of the book.]

Copyright © 2024 by Thomas W. Jones.

#NGS2024GEN



S201

Sharon Hoyt, MLIS, CG

"A Matrimonial Advertiser:" Tracing the Treacherous Trail of an early 20th-Century Romance Scammer

A Matrimonial Advertiser: Tracing the Treacherous Trail of an Early 20th-Century Romance Scammer

Board for Certification of Genealogists® Skillbuilding Lecture

Sharon Hoyt, MLIS, CG® | meadowoak@sonic.net

Long before online dating, men and women advertised through matrimonial agencies. Some found companionship, but others used marriage bureaus to prey on the lonely by marrying, bilking, and then abandoning their unfortunate victims.

Tracing matrimonial scammers can be challenging. Because they may have advertised over a wide geographic area, they may move long distances to marry new spouses, leaving records in many locations. They may also use aliases or nicknames and provide unreliable and conflicting personal information. Tracking them requires careful analysis of their records and those of their spouses.

Spotting an Unexpected Marriage

- Create a timeline of your ancestor's life and try to fill in any gaps in which a marriage might have occurred. Newspapers, city directories, voting registers, tax and court records, land deeds, and military documents are some of the many records that may provide useful information.
- Think of research as a process rather than an event. Continue to research your ancestors even after you believe you have a good understanding of their lives. Regularly researching your ancestor in online resources may yield a mention in a newly added or updated record collection or index.
- Look for marriages of short duration, particularly those that occur late in a person's life.
- Check court record indexes for divorces and annulments, and review deed records for possible land transfers between spouses. If you find relevant index entries, obtain the original records if available. They may contain information on prior marriages or include signatures which can help to establish identity.

Location Research

Establishing a person's places of residence can help you find records. Where was the couples' likely residence when they married, separated, or divorced? Did both live in the same place? Do those place(s) still exist? Have the place names or county lines changed? Understanding locations can help you determine possible migration routes, locate interim residences, and identify nearby towns where records may exist.

#NGS2024GEN



S201

Sharon Hoyt, MLIS, CG

“A Matrimonial Advertiser:” Tracing the Treacherous Trail of an early 20th-Century Romance Scammer

Research in all known places of residence

Mine records for references to relevant locations and conduct research in all of them. For example, Malinda’s marriage announcement to Isaac Johnson named three cities in Kansas, including his residence, their place of marriage, and her former residence. Newspaper research in her former hometown revealed Malinda’s scheme and identified her census entry under a previously unknown married name.

Location, location, location

Relevant information may exist at all jurisdictional levels, including towns, counties, region or district, states, and countries. To identify available research resources for a location, use place-based tools like the *FamilySearch* Research Wiki, Catalog, and Images links, and the “Explore by Location” section of the *Ancestry* Search page. Consider creating a locality guide of available resources for locations where you conduct extensive research.

Look beyond major genealogy sites

Be sure to check for locally created resources. Genealogy and historical societies, local archives and libraries, museums, and universities can often provide access to records and indexes which may not be available elsewhere.

Use maps!

Plotting event locations on a date-appropriate map can help you analyze your findings and suggest new avenues of research.

Name Searches

Keep track of name variations you find for a person and search for all of them, even if it requires multiple searches in the same source. A name table (below) can be helpful:

Name	Initials	Nicknames	Alternates	Surname Variations
Joseph Furminger	J.	Joe	James	Ferminger, Firminger, Furmanger
William Heigel	W. L.		Wilhelm	Heigle

Use Wildcard characters to find variant spellings.

Wildcards are special search characters that can help you find different versions of names. For example, the wildcard search f*m?nger finds Furminger, Firmenger, Farmanger, etc., while M?lind? finds Malinda, Melinda, Malindy, etc. For usage information, check the advanced search help on the websites you use.

#NGS2024GEN



S201

Sharon Hoyt, MLIS, CG

"A Matrimonial Advertiser:" Tracing the Treacherous Trail of an early 20th-Century Romance Scammer

Try initials-only searches with a surname

Nineteenth-century newspapers often used initials in place of full names, such as J. W. Silsby and J. Furringer. To find references to initials while minimizing irrelevant results, use a phrase search like "M C Fuller."

Unique surnames are great search terms!

When surnames are unique or rarely occur in an area, searching for only a surname can be a useful strategy. Limiting a search to a unique surname in a known place of residence can be a quick way to find relevant records.

Search for all previous married surnames

When researching a woman who was previously married, search for her birth surname and all prior known married names. Malinda reverted to the Fuller surname despite several intervening marriages and divorces. Divorce records will sometimes note what surname a woman plans use after her divorce, so check for a "restored" name in divorce case files or published legal notices.

Consider nicknames and middle names

Searching for middle names and related nicknames can help you break down research brick walls. When you find a nickname for a person you're researching, note it and include it in searches. It's also helpful to keep records of what names you've checked in each source. If you later discover a new nickname, you can re-examine previously reviewed sources for the new name. Consider the possibility that someone may also have used a nickname for their middle name. "Sarah Elizabeth" may appear in a record as "Lizzie S.," "Sallie E.," or even "Sarabeth."

Newspaper Research

Use newspapers as finding aids to original records

Newspapers are a good source of information on vital events, court actions (divorces, lawsuits, and probates), land transactions, religious observances, and other key events in our ancestors' lives. They can also be excellent tools for tracing changing names and identities. In the absence of a marriage or divorce index, a brief newspaper mention of an event can provide the information you need to obtain the related original records.

Cast a wide net

Check newspapers in the cities, counties, and states where your ancestors and their family members lived, including past places of residence. News that affected a faraway family member might be published where other family members lived. If an ancestor lived or worked near a major city or near a county or state line, check newspapers for the expanded area, since nearby newspapers sometimes contain overlapping coverage.

#NGS2024GEN



S201

Sharon Hoyt, MLIS, CG

“A Matrimonial Advertiser:” Tracing the Treacherous Trail of an early 20th-Century Romance Scammer

Look for an occupation

Tracing Malinda’s consistent employment as a carpet weaver identified her moves across state lines. An occupation can be a useful clue to establishing identity.

Correlate information across records

Extract all information from the records you use and correlate the data to show patterns and identify discrepancies. As shown below, tables and spreadsheets can help you compare evidence across records.

	Silsbee Marriage Santa Clara Co., Cal.	Johnson Marriage Leavenworth Co., Ks.	Heigel Marriage Cleburne Co., Ark.
Date	10 October 1910	9 May 1913	17 October 1913
Name	Mrs. M. C. Fuller	Malinda C. Silsby	Mrs. M. C. Silsbee
Residence	Dodge City, Ks.	Dodge City, Ks.	Morgan Hill, Cal.
Age	55	60	65
Spouse	James Watson Silsbee	Isaac R. Johnson	Wm. Heigel Sr.

Research Family/Friends, Associates, and Neighbors (FAN Principle)

Note *every* name mentioned in records for the person you’re researching. Thoroughly research all spouses, whose records may provide vital clues to other relationships or relevant research locations. For an overview of the FAN principle, see:

Mills, Elizabeth Shown. *QuickSheet: The Historical Biographer’s Guide to Cluster Research (The FAN Principle)*. Baltimore: Genealogical Publishing Co., 2012.

Mills, Elizabeth Shown. “QuickLesson 11: Identity Problems & the FAN Principle.” *Evidence Explained: Historical Analysis, Citation & Source Usage*
<https://www.evidenceexplained.com/index.php/content/quicklesson-11-identity-problems-fan-principle>).

Bibliography

For examples of other cases of multiple marriages and changing identities, see:

Hoyt, Sharon L. “[Her Sixth Matrimonial Venture: The Many Marriages of Ida May Chamberlain](#).” *National Genealogical Society Quarterly* 106 (September 2018): 217–238.

Jones, Thomas W. “The Three Identities of Charles D. McLain of Muskegon, Michigan.” *National Genealogical Society Quarterly* 96 (June 2008): 101-120.

#NGS2024GEN



S202

LaBrenda Garrett-Nelson, JD, LLM, CG, CGL, FASG
Researching African American Ancestors in Equity Court Files



RESEARCHING AFRICAN AMERICAN ANCESTORS IN EQUITY COURT FILES*

NGS VIRTUAL FAMILY HISTORY CONFERENCE 16–18 May 2024

©2024 LaBrenda Garrett-Nelson, JD, LLM, CG®, CGL^(SM), FASG
<https://www.labgarrettgenealogy.com>

Effective research of the ancestors of Freedmen requires research of enslavers.¹ Because enslaved people were valuable assets,² they were likely subjects of judicial proceedings that were often handled by courts of equity (or chancery). These courts had specialized jurisdiction to resolve controversies with remedies other than monetary damages.

Equity Courts. Much of the American legal system was derived from the “common law” of England, a system based on precedents established by English courts.³ In addition to courts of law, the English developed equity courts to address issues that the law was inadequate to handle.⁴ Decisions in equity were based on what was fair in a particular situation, not on the law.⁵ Very generally, A court of equity handled cases where the resolution required equitable remedies such as injunctions or specific performance.⁶

From time-to-time an American state may have either established separate equity courts or given equity jurisdiction to law courts. For example, Alabama Circuit courts had equity jurisdiction from 1819 until 1839 when Chancery Courts were separately established. In 1915 Alabama transferred equity jurisdiction to Circuit Courts (effective in 1917).⁷ As another example, North Carolina

*All websites were last viewed on 19 January 2024.

¹ For the definition of “Freedmen” as those who were formerly enslaved, see Randall M. Miller and John David Smith, *Dictionary of Afro-American Slavery, Updated, with a New Introduction and Bibliography* (Westport, Connecticut, London: Praeger Publishers, 1997) 267.

² Edward E. Baptist, *The Half Has Never Been Told: Slavery and the Making of American Capitalism* (New York: Basic Books, 2014), 350. “By 1860, the eight wealthiest states in the United States, ranked by wealth per white person, [included] South Carolina, Mississippi, Louisiana, . . . Georgia, Alabama, Florida, and Texas—seven states created by cotton’s march west and south.”

³ Henry Campbell Black, “Common Law,” *Black’s Law Dictionary: Definitions of the Terms and Phrases of American and English Jurisprudence, Ancient and Modern*, revised 4th ed. (St. Paul Minnesota: West Publishing Co., 1968), 345-346. The outlier is Louisiana, a state that is not discussed herein; Louisiana codified its legal system following the “civil law” tradition of Continental European countries such as France. *Ibid.*, 312.

⁴ Devine, Donn, “The Common Law of England: A Key Resource for American Genealogists,” NGSQ 95 (September 2007): 165-178.

⁵ Sir William Blackstone, *Commentaries on the Laws of England*, vol.2 (San Francisco: Bancroft-Whitney Company, 1916); 1562; *Google Books*

(https://www.google.com/books/edition/Commentaries_on_the_Laws_of_England/R20aAAAAYAAJ?hl=en&). . See note 14 regarding The Fundamental difference between law and equity.”

⁶ “Court of Equity,” *Legal Information Institution, Cornell Law School* (https://www.law.cornell.edu/wex/court_of_equity).

⁷ “Alabama: Constitution of 1819,” *Avalon Project: Document in Law, History, and Diplomacy*, Yale Law School, (https://avalon.law.yale.edu/19th_century/ala1819.asp). Also, “An Act to provide a circuit court in every county in

#NGS2024GEN



County Superior Courts had equity jurisdiction between 1806 and 1868—the 1868 Constitution abolished the distinction between law and equity.⁸

Illustrative Cases Involving Enslaved African Americans. Equity cases often arose out of estate settlements where unhappy legatees challenged the fairness of a proposed settlement. Where the issue at hand was the ownership of an enslaved person, a court of law could not “divide” human chattel in the way in which it might apportion other property; however, an equity court had additional remedies at its disposal. Because Equity Courts were supposed to administer justice based on what was fair in view of all of the circumstances, their decisions often included more detailed information about enslaved people than can be found in the files of probate or other courts.

An Equity Case Involving Title to Enslaved People

Following is an 1823 inventory and appraisal that was conducted pursuant to a decree of the court of equity in the (then) district of Laurens South Carolina, and preserved in a probate file. The equity case involved a dispute over the ownership of the enslaved woman and five children listed on the inventory.

#NGS2024GEN

Inventory and appraisal of certain negroes (Decreed by the court of Equity to) belong to the Estate of Charles Simmons dec'd. Sale of the District of Laurens State of South Carolina the 24th March 1823. —

<i>Sall and her child Sophia or Mary about 12 months old</i>	<i>550 00</i>
<i>Mary about two years old</i>	<i>350 00</i>
<i>Annancy about 12 1/2 years old</i>	<i>300 00</i>
<i>Robert about 12 years old</i>	<i>225 00</i>
<i>Lazett about five or six years old</i>	<i>175 00</i>
	<i>1600 00</i>

the State, and for the consolidation of the chancery court and all other courts of record having the jurisdiction of the chancery court or circuit court or either of them into the circuit court, and to remove all pending causes and records into the circuit court, and to provide and regulate the proceedings therein,” *General Laws (and Joint Resolutions) of the Legislature of Alabama Passed at the Session of 1915 Held at the Capitol, in the City of Montgomery, Commencing Tuesday, January 12, 1915* (Montgomery, Alabama: Brown Printing Company, 1915) 279; *Internet Archives* (<https://archive.org>). Also, Thomas McAdory Owen, *History of Alabama and Dictionary of Alabama Biography*, vol. 1 (Chicago: The S. J. Clarke Publishing Company, 1921) 230; *Hathitrust.org* (<https://www.hathitrust.org>).

⁸ Helen F.M. Leary, “A Master Plan for North Carolina Research,” *National Genealogical Quarterly* 75 (March 1987) 18. Also, 1868 Constitution of North Carolina, Article IV, section 1.

⁹ Equity Court, Laurens District, Charles Simmons & David Anderson vs. John Simmons, Sarah Madden, Elizabeth Smith, William Simmons, John Garlington, Nehemiah Franks, & Jane his wife, (1823), No. 25, “Washington



A Creditor's Claim Against a Marriage Trust

Following are excerpts from a South Carolina Court of Appeals case involving a trust established by a marriage settlement. Marriage trusts were created to hold property that would otherwise come under the control of the man a daughter was about to marry. This was a typical case where the husband's creditors challenged the validity of the trust, in an attempt to get at one of the assets: an enslaved man.

H. W. Rice ads. A. W. Burnett, trustee.

1. By the provisions of a marriage settlement, the real and personal estate of the intended wife was vested in a trustee, to be held for her until the marriage, "and from and immediately after the solemnization thereof, *in trust to permit*" the husband and wife "to have, use and possess" the said property, "for and during their joint lives, and from and after the death of either, then to permit the survivor to use and possess the said property, during his or her natural life," with contingent remainders over; and it was provided, that the real and personal estate might be altered, sold or exchanged, with the joint consent, in writing, of the trustee and *cestui*

plantation or tract of land, situate, lying and being in St. Bartholomew's parish, in the district and State aforesaid, containing, in the whole, about three thousand acres, more or less, butting and bounding, to the north and west, on the Parker's Ferry road; to the east, on Pon Pon river; to the south, on lands of Mrs. Hort and others; to the north, on lands of Mr. Fraser; together with all and singular the rights and hereditaments and appurtenances thereto belonging. And also, the following negro slaves, to wit:—Beck, *Simon*, Cyrus, Doll, Lavinia, Pender, Lizzy, Libby, Hagar, Jacob, Sancho, Abram, Peter, Dandy, Amy, Dick, Rhemus, Peggy, James, Abraham, George, Doll, Judy, Charles, Amy, the above named Pender's child, and also Doll's infant child, Andrew, Adam, Silvery, Jane, Jim, Sally, Mary, Nelly, Andrew, Diana, Nancy, Myrah, and her infant child, John, Thomas, and Celia, together with the future issue and increase of the females; to have and to hold the land and negroes,

10

Defining an Enslaved Woman's "Increase"

The following excerpt is from an 1847 case that came out of a County Superior Court to the North Carolina Supreme Court. The case revolved around what was meant by a testator when

District Equity Court, Western Circuit, Partition of Estates, 1803-1826"; microfilm C50, Laurens County South Carolina Library, Laurens. "Inventory and appraisal of certain negroes," 24 March 1823.

¹⁰ R.H. Speers, state reporter, *Equity Cases Argued and Determined in the Court of Appeals of South Carolina*, vol. 1 (Columbia, South Carolina: A.S. Johnston, 1844) H.W. Rice ads. A. W Burnett, trustee, 579–592; *Google Books* (https://www.google.com/books/edition/Equity_Cases_Argued_and_Determined_in_th/5P4aAAAAAYAAJ?hl=en&).



he referred to an enslaved woman “and her increase” in his will: Specifically, whether he meant to include all of her children no matter when they were born.

SOPHIA HURDLE & AL. vs. E. N. REDDICK & AL.

A. had put into the possession of his daughter B. a negro woman named P. While in her possession, she had two children. A. then resumed the possession and continued it to his death, during which time P. had another child. A. afterwards died and among other things bequeathed as follows: “ I give and bequeath to my daughter B. all the property I have heretofore possessed her with, except negro woman P. which I lend to her during her life, and after her death the negro woman P. and all her increase to be equally divided among my daughter B's. children.” The executors assented to the legacy. *Held* that, after the death of B. her children could

Petition For Partition of Slaves

RICHARD J. MILLSAPS v. ARCHIBALD McLEAN, et al.

Where one, by will, gave all his slaves, equally to be divided among his four children, and afterwards, by deed of gift, gave two of them, by name, to one of his children, there is no rule of law preventing the donee of the two from coming in for an equal share of the residue.

Where, on a petition for the partition of slaves, the County Court ordered that partition should be made in certain proportions, and appointed commissioners to make it accordingly, and on an appeal to the Superior Court, the order was reversed and the division ordered in different proportions, it was held that the Superior Court was not in possession of the whole case, by the appeal, and that a procedendo to the county court was proper.

PETITION for partition of slaves; heard before BAILEY, Judge; at the Fall Term, 1862, of Robeson Superior Court.

Additional References

- Black, Henry Campbell. *Black's Law Dictionary, Revised Fourth Edition*. St. Paul, Minnesota: West Publishing Co., 1968).
- Freilich, Kay Haviland and William B. *Genealogy and the Law: A Guide to Legal Sources for the Family Historian*. Arlington, Virginia: National Genealogical Society, 2014.
- Garrett-Nelson, LaBrenda. *A Guide To Researching African American Ancestors in Laurens County, South Carolina, and Selected Finding Aids*. Bloomington, Indiana: Xlibris, 2016. This is a model for research in South Carolina and other Historical Slave States.
- Rose, Christine. *Courthouse Research for Family Histories: Your Guide to Genealogical Treasures*, 2d. ed.. San Jose, California: CR Publications, 2019.

¹¹ Supreme Court of North Carolina, Hurdle v. Reddick, 29 North Carolina Reports (1847) 87; *Google Books* (https://www.google.com/books/edition/North_Carolina_Reports/o9kzAQAAMAAJ?hl=en&).

¹² Supreme Court of North Carolina, Richard J. Millsaps v. Archibald McClean, et al. I *Wilson's Law Reports* (1863) 80; *Google Books* (https://www.google.com/books/edition/Cases_at_Law_Argued_and_Determined_in_th/wMPLuiurkLEC?hl=en&).



S203

Yvette Hoitink, CG, QG

Hand-written Text Recognition: Harnessing the Power of Artificial Intelligence to Transcribe and Search Documents

Handwritten Text Recognition

Harnessing the Power of Artificial Intelligence to Transcribe and Search

Yvette Hoitink, CG[®], QG[™]



NGS conference

Session S203

18 May 2024

#NGS2024GEN

Introduction

Handwritten Text Recognition (HTR) automatically transcribes handwritten documents. Several archives in Europe are using HTR to make millions of records full-text searchable. *FamilySearch* will be using HTR for searching their collections too, announced for 2024.

Machine Learning, a form of artificial intelligence, is used to train HTR models. Well-trained models can achieve 95–99% accuracy (1-5% *character error level* or CER). Several archives and universities have made the models they trained available to the public. You do not need to be an AI specialist to use these models to generate your own transcriptions.

Even imperfect transcriptions can be useful:

- They will give you a starting point to create a transcription. You can correct errors.
- They will give you an idea of the content and relevance of the document.
- You can make images searchable to easily find them again, for example using searchable PDFs. This is similar to OCR technology for printed text.
- You can use tolerant searches (e.g. wildcards, regular expressions) to find terms despite recognition errors.
- You can use generated transcriptions together with Large Language Models such as ChatGPT to obtain summaries or translations.

© 2024, Yvette Hoitink, CG[®], QG[™]

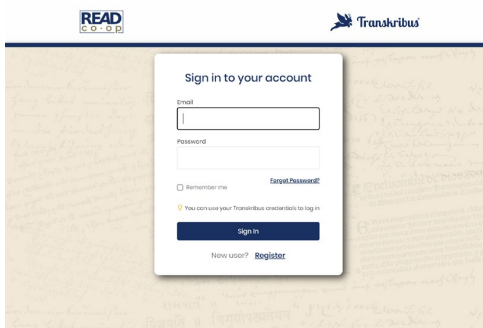


S203

Yvette Hoitink, CG, QG

Hand-written Text Recognition: Harnessing the Power of Artificial Intelligence to Transcribe and Search Documents

Step-by-Step: Using Transkribus Online to Transcribe a Record



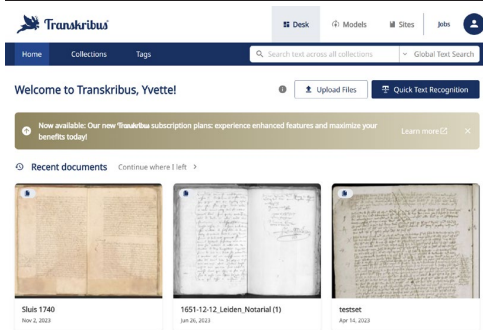
Step 1: Sign in to Transkribus

Go to <https://app.transkribus.eu>

Sign in to your Account.

First time? Click “Register” to register as a new user, then sign in.

New users receive 100 free credits, enough to transcribe 100 handwritten pages.

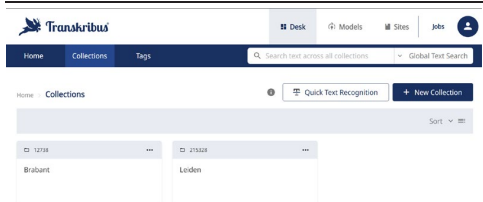


Step 2: Go to Collections

In the menu, click Collections.

The Collections section is where you manage your documents and transcriptions. It uses existing models for the recognition.

Adventurous users can generate their own models in the Models section. The Sites section allows subscribers to create a website hosted by Transkribus to share the results.



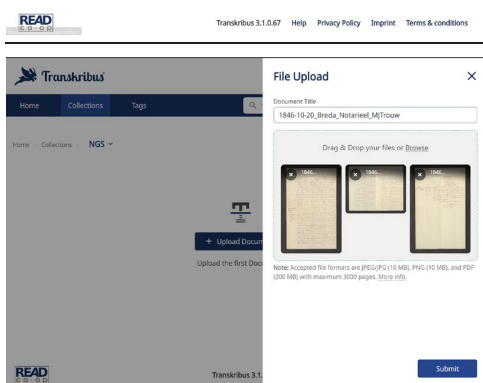
Step 3: Create Collection

Click New Collection.

Give your collection a name.

Transkribus uses three levels to organize your information:

Collection > Document > Page.



Step 4: Upload Document

Click Upload Document

Give your document a title

Press Browse to select the files on your computer (PDF, JPG or PNG).

Use high-quality images for the best results.

Click Submit.

Wait until finished, close Server Jobs.

© 2024, Yvette Hoitink, CG®, QG™

#NGS2024GEN

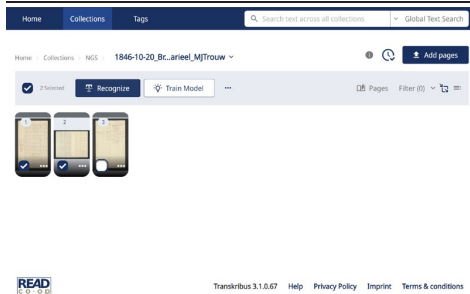


S203

Yvette Hoitink, CG, QG

Hand-written Text Recognition: Harnessing the Power of Artificial Intelligence to Transcribe and Search Documents

#NGS2024GEN



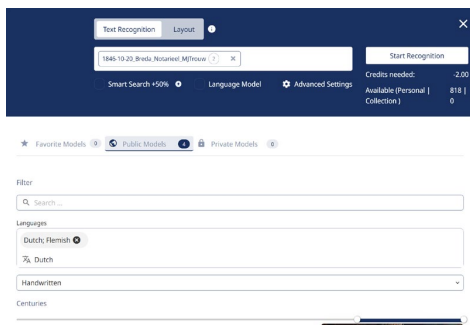
Step 5: Select the document to transcribe

In the Collections menu, click the collection.

Click the document you just created.

Check all the pages you want to transcribe.

Click Recognize.



Step 6: Configure and start recognition

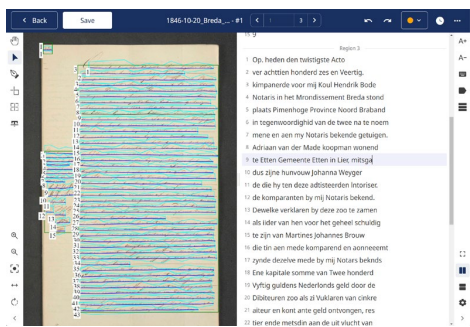
In Languages, type the language of the document and select the language.

Select whether the document is handwritten or printed.

In the list at the bottom, select a model.

Click Start Recognition.

Wait until the job is finished.



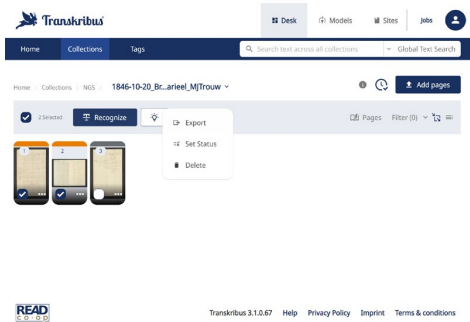
Step 7: View and edit transcription

Go to the document (in the Jobs list or collection tab).

Click on a page to see the transcription.

You can click on a line to highlight the transcription of that line.

If you want, you can edit the transcription in the right pane.



Step 8: Export the transcribed document

Go to the document in the collection.

Click ... next to Train Model.

Select Export.

Select the output format: Transkribus PDF and Text Files (TXT).

Start Export.

You will receive an email with the download link.

© 2024, Yvette Hoitink, CG®, QG™



S203

Yvette Hoitink, CG, QG

Hand-written Text Recognition: Harnessing the Power of Artificial Intelligence to Transcribe and Search Documents

Tool comparison

	Transkribus	Loghi
Platform	In the browser or desktop client (Windows, Linux, Mac).	Docker and Linux (can be emulated) on your desktop.
Hardware requirements	Minimal. Text recognition is done on Transkribus servers. Any device with a browser will work.	Requires a powerful computer including graphics card with CUDA cores. Recognition runs on your own computer.
Models	Many, including English.	Few, no English (yet).
User friendly?	Yes, especially in the browser.	No, for advanced computer users only. Hard to set up.
Price	Credit system. New users get 100 free credits. Extra credits may be purchased. Subscription for monthly credits, advanced models, more storage.	Free (open source).
Website	https://www.transkribus.org	https://github.com/knaw-huc/loghi

Learn More

“Transkribus.” Instruction videos and background information. *YouTube*.

<https://www.youtube.com/@transkribus>.

“Insights Blog.” *ReadCoop*. <https://readcoop.eu/insights/>.

“Public AI Models.” *Transkribus*. <https://www.transkribus.org/public-models>.

“Success Stories.” *ReadCoop*. <https://readcoop.eu/success-stories/>.

“Transkribus Blog.” *Transkribus*. <https://www.transkribus.org/blog>.

Hoitink, Yvette. “How I use AI in my work.”

<https://www.dutchgenealogy.nl/how-i-use-ai-in-my-work/> : 2023.

_____. “Using AI for Transcriptions: VerledenTekst.”

<https://www.dutchgenealogy.nl/using-ai-for-transcriptions-verledentekst/> : 2023.

#NGS2024GEN



About the presenter

Yvette Hoitink, CG®, QG™ is a professional genealogist, writer, and lecturer from the Netherlands who specializes in tracing ancestry from the Netherlands and its former colonies, including New Netherland. She has a background in computer science and artificial intelligence.

Website: <https://www.dutchgenealogy.nl>.

© 2024, Yvette Hoitink, CG®, QG™



S204

Grant Din, MA

How Established and More Recently Arrived Asian American Researchers Can Learn from Each Other

How Established and More Recently Arrived Asian American Researchers Can Learn from Each Other

Grant Din
grant@tonaidin.net

As described in the lecture, most people of Asian descent in the United States today have families who arrived in the U.S. after the Immigration and Nationality Act of 1965. On the other hand, most active Asian American genealogists I have met have roots in America that go back to before World War II and even as far back as the 1850s. The exclusion era of 1882-1943 made it very difficult for Asians to immigrate to the U.S., and those who did try have extensive documents still in the records of the National Archives as well as the U.S. Citizenship and Immigration Service. More recent immigrants have fewer and less detailed records available.

Pre-1965 Case Files and Other Documents

There are many resources available for pre-1965 Asian American immigrant research and information. Generally, if Asian immigrants passed through U.S. ports between 1893 and 1943, San Francisco between 1910 and 1940, they were processed at centers such as Angel Island, San Francisco, and Los Angeles, California; Port Townsend, Sumas, or Seattle in Washington; El Paso, Texas; New York City, or Boston. Not all of them have case files; if their processing was routine, they might not have files. Here are a few resources on where to search for them:

Searches on the National Archives website can produce case files or links to other documents. Visit [archives.gov/research](https://www.archives.gov/research) and enter the name of the person you are searching. Entering the name "Chiu Chew Lin," for example, brings up a link to a duplicate certificate of identity like this one, in the collection of the National Archives branch in San Bruno, near San Francisco. Staff there can scan these certificates for you, and with the case number listed on the certificate, may be able to find the associated case file, which often will contain photographs, interrogations to ensure the immigrant has legal status, testimonies by supporters, and other documents. All case files themselves do not appear to be listed on the Archives.gov search at this time.



Chiu Chew Lin, Duplicate Certificate of Identity, Records of the INS, RG 85, National Archives at San Francisco

#NGS2024GEN



S204

Grant Din, MA

How Established and More Recently Arrived Asian American Researchers Can Learn from Each Other

testified for him, and extensive questioning of him and his father, who had merchant status which allowed him to be exempt from the Chinese Exclusion Act.

If the immigrant became a naturalized citizen or participated or was named in the “confession” program in the 1950s or 1960s, it is likely that the file became an “A-file” (“A”=“Alien”) and could be in other physical locations. Many of these files are now in San Bruno and available for viewing 100 years after people were born, but the process is a bit behind as U.S. Citizenship and Immigration Services slowly releases them to the National Archives. If the files are in San Bruno or possibly NARA Kansas City, you will be able to find them in the National Archives index at catalog.archives.gov/. A-file numbers are on naturalization petitions and certificates, among other places. Staff at NARA can scan these files for a fee or you can view and scan them in person when the facility is open.

Some A-files are available from the US Citizenship and Immigration Services, depending on the A-file number. Genealogist Marisa Louie Lee recommends making a free Freedom of Information Act request first regardless of one’s A-file number, which you can do at uscis.gov/records/request-records-through-the-freedom-of-information-act-or-privacy-act. You will be notified if you should instead go through the genealogy program, for which there is a fee. USCIS has a genealogy program for A-files under 8 million and other records, which requires an index search and fee and if the file is found, an additional fee for the file. Find out more here: <https://www.uscis.gov/history-and-genealogy/genealogy/requesting-records>.

World War II Records: “Enemy alien” files for Japanese, Germans, and Italians who were briefly held at the former Immigration Station on Angel Island are in the files of the National Archives in College Park, MD. They can be searched for at catalog.archives.gov.

Japanese American Wartime Documents

Information on a database of Japanese American Internees is at <https://www.archives.gov/research/japanese-americans/wra>.

Annotated Selected Bibliography for Research and Historical Information:

Chinese Family History Group, Guide for Researching Your Chinese Family History. Online (<https://chinesefamilyhistory.org/guide/>), 2020.

Lee, Erika. *The Making of Asian America: A History*. New York, Simon & Schuster, 2015. An excellent overview of Asian American history, from the first arrivals in North America before the formation of the United States to more recent immigrants and refugees. Its bibliographic essay is very extensive.

#NGS2024GEN



S204

Grant Din, MA

How Established and More Recently Arrived Asian American Researchers Can Learn from Each Other

Lee, Erika, and Judy Yung. *Angel Island: Immigrant Gateway to America*. New York, Oxford University Press, 2010. The definitive book about Angel Island immigrant history, it has a general overview about Angel Island plus sections on Chinese, Japanese, South Asian, Korean, Russians/Jews, Mexican, and Filipino immigrants.

There are several personal Asian American immigration/genealogy stories with extensive research that are inspiring for genealogists, all with extraordinary research and storytelling. These are a sampling of excellent accounts.

Chin, Ava. *Mott Street: A Chinese American Family's Story of Exclusion and Homecoming*. New York, Penguin Press, 2023. Chin, a fifth-generation New Yorker, tells the story of her family's immigration despite the Chinese Exclusion Act, their work on the transcontinental railroad and the racism of frontier towns, journeys through Angel Island, sneaking across the U.S.-Canada border, and lives and loves in New York Chinatown.

Ching, Frank. *Ancestors: The story of China told through the lives of an extraordinary family*. London, Rider (an imprint of Ebury Publishing), 2009 (revised edition). Ching tells the story of 34 generations of his family. He came to America in 1957 and later returned to Hong Kong.

Hajratwala, Minal. *Leaving India: My Family's Journey from Five Villages to Five Continents*. Boston, Houghton Mifflin Harcourt, 2009. Hajratwala spent seven years traveling the world to interview 75 family members who left Gujarat, India to live in Fiji, Aden, East Africa, South Africa, London, United States, Canada, Australia, New Zealand, Hong Kong, and Kuwait. She was born in San Francisco and raised in New Zealand and suburban Michigan.

Kang, K. Connie. *Home was the land of morning CALM: A Saga of a Korean-American Family*. Reading, MA, Addison-Wesley, 1995. Kang, a pioneering Korean immigrant journalist, interweaves her family's story with Korea's recent history. Her family fled from Korea to Japan and then Okinawa during the Korean War and she came to the U.S. to study journalism.

Madison, Paula Williams. *Finding Samuel Lowe: China, Jamaica, Harlem*. New York, Amistad/Harper Collins, 2015. Madison tells the story of her search for her grandfather Samuel Lowe, who came to Jamaica from China in the 1910s and fathered her mother and other children.

Masumoto, David Mas. *Harvest Son*. New York, W.W. Norton & Company, 1998. Farmer-writer Masumoto tells his family history including the rural culture of Japan and World War II incarceration, through the lens of his organic peach farm.

Wagner, Alex. *Futureface: A Family Mystery, an Epic Quest, and the Secret to Belonging*. New York, One World, 2018. Journalist Wagner searches for her roots in Luxembourg and Burma, taking the reader on a fascinating journey.



S301

Dana Palmer, CG, CGL
Using Cluster Research to Prove Kinship

Using Cluster Research to Prove Kinship

Board for Certification of Genealogists® Skillbuilding Lecture

By: Dana Palmer, CG®, CGL^(SM)

dana@treasuredlineage.com

www.treasuredlineage.com

Proving kinship is vital to connecting generations. Kinship proof may be needed for those who want to join a lineage society while others just want documented proof their research is correct. Whatever the reason, a record or records that answer the questions directly or indirectly will be needed to do this. This is not difficult for generations born after the start of the 20th century because most citizens of the United States are easily identified by their birth certificate and social security record.

As you move earlier in time proving kinship becomes increasingly difficult. Those born in the late 1880s to early 1900s may not have a birth record if they lived in a rural location. Some of those people may have applied for a late or delayed birth registration when time came to apply for social security benefits. Make sure to check for these delayed records if the birth record is missing. Copies of the application for social security, church birth and baptismal entries, guardianships, records found in military pension files, and bible records can also be used to prove kinship when used in conjunction with other sources such as census and probate records if the relationship to their parents is clearly stated.

Proving kinship when no birth record exists is difficult, but not impossible. Sometimes it can be easily remedied by finding a will for the child's deceased parent where the child is listed by name as an heir. Other times an indirect proof argument will have to be written to show how the family connects. Sometimes these proof arguments are published in local or national periodicals and journals.

Helpful records for proving kinship:

- Birth records
- Death records
- Marriage record (post 1900s)
- Church records
- Bible record
- Obituaries
- Probate / court records
- Land records
- Cemetery & related records
- Census records (federal & state)
- Military records
- Tax records
- County / local histories
- Maps

Occasionally kinship for your line will have to be shown by proving kinship to a sibling whose kinship can be proven to their parents. Other times, cluster research will be needed to show a potential possibility and eliminate all other choices.

#NGS2024GEN



S301

Dana Palmer, CG, CGL
Using Cluster Research to Prove Kinship

Popular methods to prove kinship

Directly – this method is where you find a record for that person that states the relationship directly such as a birth record, bible record, church record, will, deed, military record, etc.

Indirectly – this method uses a variety of sources correlating evidence to prove kinship. A written proof argument is often needed when proving kinship indirectly. Methods to prove kinship indirectly include:

- Through a variety of sources for that person
- Through a sibling whose kinship is proven
- Using cluster research for the person and extended family, friends, and others
- Using elimination to show the family left is the only possibility

Kinship tips

- Don't assume kinship. Everything must be proven!
- If you are looking at probate records, obtain copies of all the records (estate papers, journal records, court records, etc.) not just those found online, especially if they died intestate.
- Not all records are online, so you may need to dig deeper and check the local records too.
- Kinship evidence sometimes is listed in the neighbors' records such as in the sale bill (people such as family, friends, and neighbors buying items from the deceased's estate).
- Just because they are on the same record together does not prove they are related.
- Search for statements of relationships in deeds and probate records for earlier generations.
- Search cemetery interment records for extended family members who may be buried in the same cemetery or plot.
- Use military service records and widow's pension files for affidavits and statements of kinship.

Develop a Research Plan

It's helpful to have a plan or goals when you want to prove kinship. This "plan of attack" will be essential in being successful. The research plan will help you identify sources needed to prove your kinship hypothesis.

- Step 1: Identify objective / goals
- Step 2: List known facts
- Step 3: Create a working hypothesis to prove / disprove theory
- Step 4: Identify sources to support / disprove hypothesis
- Step 5: Search for the records
- Step 6: Write report / article with sources

#NGS2024GEN



S301

Dana Palmer, CG, CGL
Using Cluster Research to Prove Kinship

Do I need to write a kinship proof argument?

It depends.

Do you have enough evidence to support kinship for that person without an explanation such as a document that directly states the relationship of the child to his parents? The document may be one of the following:

- birth record
- baptism record
- bible record
- document where the child is listed as an heir such as a will
- a document where the relationship is directly stated such as in a deed
- 1880 or later census record
- affidavit in a military pension file where the relationship is clearly stated

If the relationship isn't directly stated or has to be deduced from multiple records, it is advisable to write a proof argument with citations. This is especially important if you plan on submitting a lineage society application since the reviewers are limited in how much time they can spend on each application. If the kinship is not easily seen, the application will be rejected. A clearly written kinship proof argument can supplement records submitted for the application and be key in having the generation in question be approved.

Federal census records prior to 1880 can not be used to prove kinship (in almost all cases) because they do not list the relationship in the record. They can be used in conjunction with other records to indirectly show how the family relates.

Tips for writing a kinship proof argument

- Be methodical and search for records of all potential and extended family in the area.
- Start with the more current time period and work backwards.
- If no direct record exists to prove kinship, try proving kinship to a sibling using a variety of records including military records and deeds.
- If needed, eliminate other potential parents in the area by searching records including probates, deeds, tax, census, cemetery, church, etc.
- Cite your sources using the format used in Elizabeth Shown Mills' book *Evidence Explained*.
- Consider submitting your kinship proof argument for publication in one of the scholarly journals, in addition to the lineage society. Make sure to follow the guidelines for how the journal prefers their sources to be cited.
- When you finish writing your proof argument, read it aloud to catch mistakes, then read it from the back forward. Have a non-genealogist read the report and give feedback. Make sure your writing and proof argument is clear and concise so people unfamiliar with the family can follow what you wrote.



S301

Dana Palmer, CG, CGL
Using Cluster Research to Prove Kinship

Further reading

Board for Certification of Genealogists. *Genealogy Standards*. Second Edition Revised. (Nashville, Tennessee: Ancestry, 2021).

Devine, Donn. "Evidence Analysis." In *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians*, edited by Elizabeth Shown Mills. (Baltimore, MD: Genealogical Publishing Company, 2001).

FamilySearch Wiki. [https://familysearch.org/wiki/en/Tracing_Women_Using_Cluster_Genealogy_\(National_Institute\)](https://familysearch.org/wiki/en/Tracing_Women_Using_Cluster_Genealogy_(National_Institute)) "Tracing Women Using Cluster Genealogy" (National Institute).

FamilySearch Wiki. https://www.familysearch.org/en/wiki/Inferential_Genealogy "Inferential Genealogy"

Jones, Thomas W.

---- "Inferential Genealogy," <https://www.veoh.com/watch/v43667807EJA48D6n>

---- "Inferential Genealogy," http://broadcast.lds.org/elearning/FHD/Community/en/CBIG/Inferential_Genealogy_Course_Handout.pdf

---- "Inferential Genealogy," https://www.scgsgenealogy.com/members_only/2016/2016-03-16-Jones-Inferential_Genealogy_Deducing_Ancestors_Identities_Indirectly.pdf

---- "Reasoning from Evidence." In *Professional Genealogy - Preparation, Practice & Standards*, edited by Elizabeth Shown Mills. (Baltimore, MD: Genealogical Publishing Co., 2018).

---- *Mastering Genealogical Proof*. (Arlington, VA: National Genealogical Society, 2013).

Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. 4th Edition. (Baltimore, MD: Genealogical Publishing Co., 2024).

Mills, Elizabeth Shown. *QuickSheet: The Historical Biographer's Guide to Cluster Research (The FAN Principle)*. (Baltimore, MD: Genealogical Publishing Co., 2012).

The Family History Guide Association. "Goal 7: Solve problems and use effective research methods." In *The Family History Guide*. <https://www.thefhguide.com/project-4-discover07.html>

©Dana Palmer, 2024

#NGS2024GEN



S302

Dr. Shelley Viola Murphy

From Heroes to Fathers: Unveiling the Stories of Black Military Soldiers and the Generations They Fathered

From Heroes to Fathers: Unveiling the Stories of Black Military Soldiers and the Generations They Fathered

Dr. Shelley Viola Murphy

<https://familytreegirl.com>

shelleyviola@gmail.com

Objective: The objective is to shed light on the often overlooked and rich history of African American military soldiers and their progeny, including the 'Brown Babies' — a generation born from unions between African American soldiers and local individuals in Germany and Japan during and after WWII.

Background: A brief overview of the role of African and African Americans in the U.S. military from the Revolutionary War to World War II. Their contributions are often overlooked even though they played critical roles showing bravery and dedication amidst systemic prejudice and discrimination.

Brief overview of African American's Roles and Contributions:

- Revolutionary War-6,600+ and up to 9k and Black Loyalist, about 20k (women were involved as well) <https://www.dar.org/library/research-guides/forgotten-patriots>
- War of 1812-some 5,000 enslaved, provided strategic intelligence, access to supplies, general labor, serving under white officers. <https://www.nps.gov/subjects/warof1812/african-american-story.htm#:~:text=Although%20the%20documentation%20is%20fragmented,substantial%20numbers%20on%20either%20side.>
- Civil War-By the end of the Civil War, roughly 179,000+ black men (10% of the Union Army) served as soldiers in the U.S. Army and another 19,000 served in the Navy. (USCT's, etc.): https://en.wikipedia.org/wiki/Military_history_of_African_Americans_in_the_American_Civil_War
- WW1- about 350,000 African Americans served in segregated units. Several units saw action alongside the French soldiers fighting against the Germans, and 171 African Americans were awarded the French Legion of Honor
- WW2- more than 2.5 million African American men registered for the draft, and African American women volunteered in large numbers. When combined



S302

Dr. Shelley Viola Murphy

From Heroes to Fathers: Unveiling the Stories of Black Military Soldiers and the Generations They Fathered

with black women enlisted into Women's Army Corps, more than one million African Americans served the Army during the War. (Feb 27, 2020)

- Vietnam-A total of 300,000 African-Americans served in Vietnam. Info from https://en.wikipedia.org/wiki/Military_history_of_African_Americans_in_the_Vietnam_War

Typical military records you will find:

- Registrations, Pensions, Wounded and Deserters, Army of Enlistments-1798-1914, Units, Regiments
- Bureau of Refugees, Freedmen & Abandoned Lands, USCTs
- Final Payment Vouchers index for Military Pensions 1818-1864-ancestry.com
- WW1 Draft Registration Cards: 1917-1918 (Ancestry.com). Also, transportation records and deceased files, journals, unit histories, etc.

Focusing on WW2 many African American soldiers stationed overseas in places such as Germany and Japan formed relationships with local women, leading to the birth of a generation of mixed-race children, often referred to as "Brown Babies. Researching the histories and experiences of the African American fathers of the "Brown Babies" after the war presents several challenges, mainly due to the social and political dynamics of the time.

Here are **five common challenges** that researchers might face:

- 1. Incomplete Records:** military records & birth records
- 2. Stigmatization and Secrecy:** Some are reluctant to share information & it could be sensitive information
- 3. Sociopolitical Barriers: Legal Barriers & Societal Norms:** The prevalent societal norms of the time, both in the U.S and in countries like Germany and Japan, did not favor interracial relationships, which might have led to the estrangement of these fathers from their children
- 4. Geographical Separations: Distance & Relocations**
- 5. Language Barriers**

Suggested strategies to help deal with the challenges:

- Seek out oral histories, collaborating with organizations focused on this historical period, fostering open dialogues can aid in piecing together the fragmented histories and narratives surrounding the African American fathers of the "Brown Babies."



S302

Dr. Shelley Viola Murphy

From Heroes to Fathers: Unveiling the Stories of Black Military Soldiers and the Generations They Fathered

- Understanding the country's adoption laws during the time when the "Brown Babies" were put into orphanages is vital for several reasons such as:
 - Having historical accuracy information, personal narratives, rights and reunifications & social and cultural context
 - **To find out laws regarding adoption: look at historical research:** archival research, & academic journals, obtain an expert
- **Online Databases and Libraries: Digital Archives & Genealogy Platforms:** Social Media & Networking, Literature reviews: Books and Memoirs & Newspaper Archives

Explore various resources, both offline and online: **Germany**

1. **German Federal Archives (Bundesarchiv):** They house a vast collection of documents including legal texts, government decrees, and other official documents that can shed light on the adoption laws of that period.
https://en.wikipedia.org/wiki/German_Federal_Archives
2. **German State Libraries and Universities:** Many libraries and universities have digitized collections where you might find academic research, journals, and books on the topic.
3. **Local Civil Registration Offices (Standesämter):** These offices might have historical data and information regarding adoption processes and individual cases.

Japan

1. **National Diet Library:** Japan's National Diet Library would be a resource for accessing legal documents, government publications, and academic research materials related to the adoption laws and processes in Japan during that period.
<https://www.ndl.go.jp/en/>
2. **Japanese Universities and Research Institutions:** Institutions such as Waseda University and The University of Tokyo might house pertinent research materials and archives that can provide insights into the adoption procedures.
3. **Online Resources: Digital Archives:** Digital collections such as JACAR (Japan Center for Asian Historical Records- <https://www.jacar.go.jp/english/>) for Japan, and the German Digital Library (<https://www.deutsche-digitale-bibliothek.de/>) for Germany can be resources to find digitized documents, publications, and research materials.



S302

Dr. Shelley Viola Murphy

From Heroes to Fathers: Unveiling the Stories of Black Military Soldiers and the Generations They Fathered

Genealogical Websites: Websites like Ancestry.com and FamilySearch.org sometimes offer forums and resources where you can find specific information regarding adoption laws and personal narratives.

Non-Governmental Organizations such as Historical Societies & Books & Academic Journals. <http://afrogermans.us/german-brown-babies-2/> and https://en.wikipedia.org/wiki/Elizabeth_Saunders_Home?fbclid=IwAR3SWa-UwlkBvWSkX2awkOKN7pj2DPCtYEW_CbsM6a0utPRbI_7JRScPIfl

Personal Narratives: seek out oral histories and any documentaries. Look for groups focused on this same topic.

Finding a biological parent, particularly in the context of being a “Brown Baby” can be a personal and potentially challenging journey. Here are some steps to help you begin this journey to find an African American father:

- **Gathering All Known Information:** Start with gathering all personal documents such as birth certificates, adoption papers, or any other document that might contain information about your biological father. Speak to family members or other individuals who might have knowledge or information about your biological father.
- **DNA Testing:** Consider using DNA testing services. Also look at Genealogy Databases: Once you have your DNA results, you can upload them to various genealogy databases to increase the chances of finding a match.
- **Research: Know the Historical Context & Military Records:** Websites such as the U.S. National Archives and fold3.com can be a starting point.
- **Networking and Community Engagement:** Join support groups or online communities where you can connect with others who are on a similar journey. Utilize social media platforms to reach out to potential relatives or to spread the word about your search.
- **Professional Assistance:** Hire a Researcher or Genealogist who specializes in this field and also obtain legal assistance and can also speak/read the language.
- **Emotional Preparedness:** Be prepared emotionally for the potential outcomes of your search. Be patience and persistence. Counseling is available.
- **Document Your Journey: Keeping Records & Personal Narratives:**
- **Following Up on Leads: Contacting Matches & Building Relationships**
- **Final Step: Reunion, if you choose too and Celebrate Your Roots.** Remember, everyone’s journey is unique, and it might take time to find the answers you are seeking. Proceed with sensitivity, both towards yourself and others, as you undertake this significant journey.

#NGS2024GEN



S303

Judy G. Russell, JD, CG, CGL
In That Case: Using the Caselaw Access Project

IN THAT CASE:

Using the Caselaw Access Project

Judy G. Russell JD CG CGL

The **Legal Genealogist**®

<https://www.legalgenealogist.com>

legalgenealogist@gmail.com

Introducing *Case.law*

The website <https://case.law> is the entry portal and home base for the Harvard Law School Caselaw Access Project. Initiated in the fall of 2015 as a cooperative venture with Ravel Law, the project set out to digitize every volume of published court opinions held by the Harvard Law School Library—more than 40,000 volumes from virtually every court in the United States. Its stated goal: “to make all published U.S. court decisions freely available to the public, online, in a consistent format.”

Today, more than 6.9 million cases beginning in 1658 and extending through 2020 appear on the website from “all state courts, federal courts, and territorial courts for American Samoa, Dakota Territory, Guam, Native American Courts, Navajo Nation, and the Northern Mariana Islands.” Thanks to a partnership with the subscription service *Fastcase*, new cases are added on a yearly basis. Note that the initial data partner Ravel Law—now owned by LexisNexis—maintains a separate entry portal at <https://www.ravellaw.com/#/>.

Why use *Case.law* and Published Cases

Published court opinions offer a wealth of information useful for genealogical research, both specifically as to named individuals and generally as they reflect the conditions of the time and place of decision.

Finding a case in which an ancestor appears as a court official, lawyer, litigant or witness can add depth and breadth to an individual or family history. Reading the opinion of the U.S. Supreme Court in *Stevenson’s Heirs v. Sullivant*, 18 U.S. 207 (1820) (<https://cite.case.law/us/18/207/>), for example, allows a researcher to chart out three

Our data

360 years of United States caselaw

State and Federal Totals	
6,930,777	Unique cases
612	Reporters
36,357,668	Pages scanned
Federal Totals	
1,842,484	Unique cases
75	Reporters
10,409,741	Pages scanned

#NGS2024GEN

©2024 — Judy G. Russell, JD, CG®, CGLSM



S303

Judy G. Russell, JD, CG, CGL
In That Case: Using the Caselaw Access Project

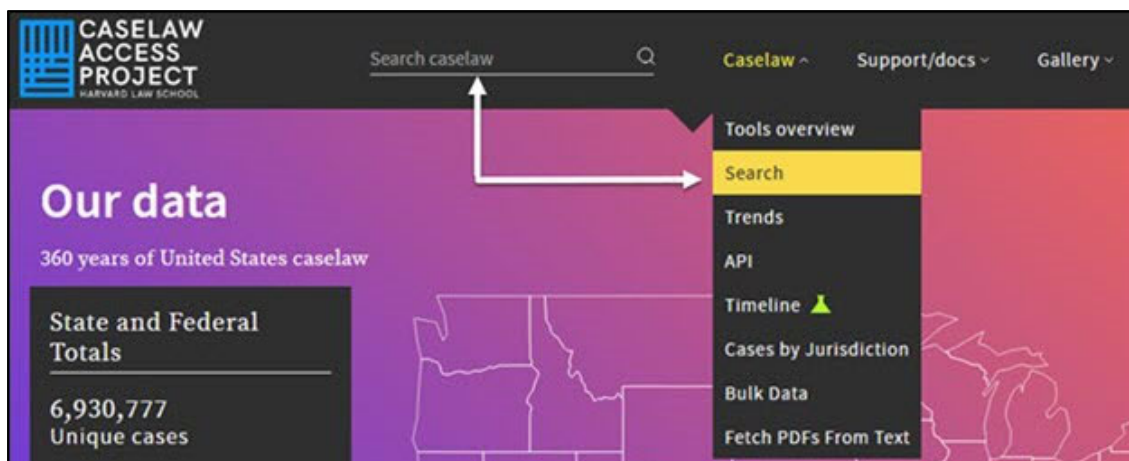
generations of a Revolutionary War-era Virginia family and understand how land passed from one set of claimants to another.

Finding a case in which a court focused on an issue of general significance within a time or place can help create a better view of the historical context in which an ancestor lived. Reading, for example, the U.S. Supreme Court’s opinion in *Scott v. Sandford*, 60 U.S. 393 (1856)—the Dred Scott case (<https://cite.case.law/us/60/393/6142949/>)—allows a researcher to gain a deeper broader understanding of the institution of slavery in America in the years just before the Civil War.

Searching *Case.law*

Case.law is a relatively simple website to use, but does have some quirks in its search system. Its Search documentation page (https://case.law/docs/site_features/search) notes that the search tool has only “a basic interface for locating and viewing the cases in our repository. You can use it to search through our cases and some of our metadata tables, but there are no advanced tools.”

The basic search features can be accessed either at the top of most pages (the words “Search caselaw” appear with a search icon) or from a Search page (<https://case.law/search/#/>) accessed by dropping down the Caselaw menu from the top menu and choosing Search.



The default is a simple full-text search of the entire database. The search will stem search terms (returning results based on potential variations of a keyword that use the same root or stem) and combine the search terms with the Boolean search command AND (returning results in which all search terms appear). A search using the family name David Davenport, for example, will return all cases in which the words David and Davenport appear, and will also return all cases in which the word Davids or Davidson or the like appears.

©2024 — Judy G. Russell, JD, CG®, CGLSM

#NGS2024GEN

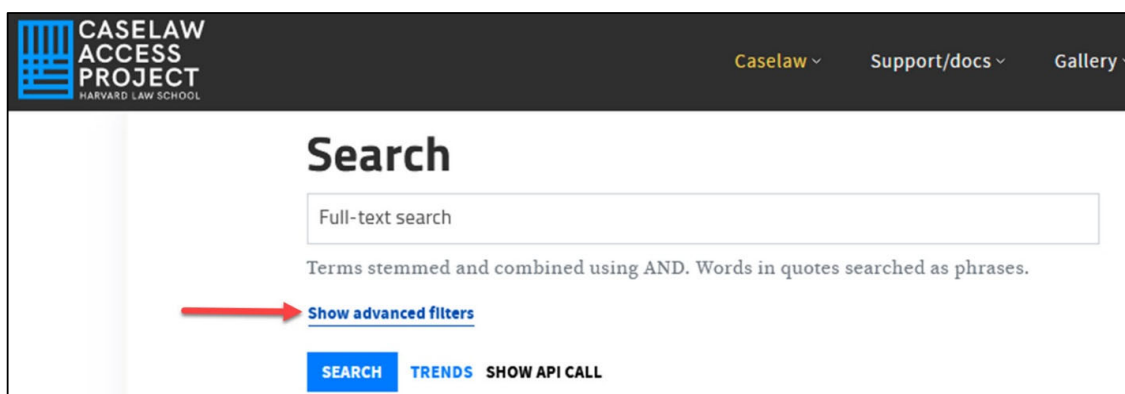


S303

Judy G. Russell, JD, CG, CGL
In That Case: Using the Caselaw Access Project

There are two ways to limit a full-text search: exact phrase searching and exclusion searching. Exact phrase searching requires quotation marks around the search term. Searching, for example, for “David Davenport” returns only those cases in which that exact name appears. Exclusion searching requires a leading minus sign (-railroad, for example) and will eliminate any case in which the excluded term appears.

Filters to limit a search from the outset can be accessed on the Search page by clicking on the “Show advanced filters” link:



Those filters will also appear in a left-side box after a basic search is performed, there are advanced filters for search options that include:

- Case name abbreviation (Smith v. Jones, for example)
- Docket number
- Reporter (the name of the volume set in which the case was published)
- Jurisdiction (state or territory)
- Citation (60 U.S. 393, for example)
- Court
- Author (judge who wrote opinion)
- Author type (to search for dissent or concurrence)

Combining search options can limit results immediately to cases of potential interest. For example, a search for the surname Davenport will return 42,240 results. Limiting the search to the Jurisdiction North Carolina reduces that to 933 results. Limiting the search further to the years 1800-1850 reduces the hits to 14.

Reading/Downloading the Cases

Each hit returned in a search is a hot link to a published opinion. Each case appears in two useful formats: plain text on the right and PDF in a link on the left Case Outline box. Note that the plain text results from optical character recognition (OCR) of the published volume and is often inaccurate, and reference to the PDF file may be necessary to accurately read the text.

©2024 — Judy G. Russell, JD, CG®, CGLSM

#NGS2024GEN



Clicking on the PDF link generally offers a user the option to read the file online or save it to the user's computer. Downloads are limited to 500 cases per day. Note that, in some circumstances, downloads may require registration (see the explanation and registration link at https://case.law/docs/site_features/registration).

Other *Case.law* Features—the Fun Stuff

Other features of the Case.law website can provide additional historical context to a case, and are accurately described by the site as the Fun Stuff. These include:

- Historical Trends (<https://case.law/trends/>): graphing the frequency of words and phrases that appear in court cases over time (seeing, for example, how often the courts have referred to both “baseball” and “apple pie” in reported opinions).
- Witchcraft in Law (<https://case.law/exhibits/witchcraft>): mapping all cases in which the word “witchcraft” has appeared in an opinion.
- Caselaw Limerick (<https://case.law/exhibits/limericks>): a random limerick generator based on published cases.
- California Wordclouds (<https://case.law/exhibits/wordclouds>): charting most-used words in California cases from 1853 to 2015.
- Caselaw colors (<https://colors.lil.tools/>): graphic depiction of references to colors within court cases.

Resources

Caselaw Access Project. Harvard Law Library. <https://case.law/>

— . Documentation > Site Features > Search. https://case.law/docs/site_features/search

— . Gallery. <https://case.law/gallery/>

Public Case Access. Ravel Law (LexisNexis). <https://www.ravellaw.com/#/>

Case.law in the News

Ambrogi, Robert J. “New Legal Research Tool Taps Into Caselaw Access Project’s 6.7M Cases.” *LawSites*, posted 26 June 2020. <https://www.lawnext.com/2020/06/new-legal-research-tool-taps-into-caselaw-access-projects-6-7m-cases.html>

Espinoza, Laura C., and Katherine S. Li. “Harvard Law Gives Public Free Access to Four Centuries of U.S. Court Cases.” *The Harvard Crimson*, posted 1 November 2018. <https://www.thecrimson.com/article/2018/11/1/caselaw-access-project/>

“Harvard Law School launches ‘Caselaw Access’ project.” *Harvard Law Today*, posted 29 October 2015. <https://hls.harvard.edu/today/harvard-law-school-launches-caselaw-access-project-ravel-law/>

Treisman, Rachel. “Slave cases are still cited as good law across the U.S. This team aims to change that.” *NPR*, posted 14 June 2023. <https://www.npr.org/2023/06/14/1181834798/slave-cases-precedent-us-legal-system>

Website URLs verified 4 February 2024.

©2024 — Judy G. Russell, JD, CG®, CGLSM



S304

Jill Morelli, CG, CGL
Research Planning: The First Step to Solving Tough Problems

Research Planning: The First Step to Solving Tough Problems

S304

Jill Morelli, CG, CGL

jkmorelli@gmail.com

<https://theCDGseries.wordpress.com>

<https://appliedgen.institute>

In the course of my career as a genealogist my thoughts about research planning have changed:

- I used to think that research planning was something that you did when you ran out of other ideas to research.
- I used to think research planning was of collecting records only.
- I used to think that research planning was focused on recording your research in a research log.

If it's not the above...what is research planning? Let's explore a few basic themes related to research planning; what it is and isn't:

- Planning the plan
- Crafting a strong research question
- Identifying your known information
- Identifying three different types of research plans and their application
- Knowing when to stop

Planning the Plan

Why do I need to plan my research and when should I plan? The answers to these questions depend on your overall research strategy. If your strategy is to gather similar information for each ancestor and search broadly for all, then you may have an overall goal of consistency. If, on the other hand you have a single tough problem you would like to solve, then you have a more focused goal. Both start with a research plan. Neither strategy is wrong and both may be warranted—even at the same time! We will look at both strategic goals and see how they differ from a research plan perspective.

Crafting a strong research question

Let's not get ahead of ourselves. Whether our strategic goal is consistency of evidence or a single tough problem, we must craft a strong research question. There are some dos and don'ts:

Do:

- Focus on one individual/problem
- Have a date of a known event
- Include a place of known location
- Ask for what you want

Don't

- Include all the known information
- Pose too broad of a question
- Answer the question in the question
- Pose a question about feelings or motivations



S304

Jill Morelli, CG, CGL
Research Planning: The First Step to Solving Tough Problems

There are three types of research questions (RQ): identity (ex: when and where born?), relationships (ex: who were the parents?) and event (ex: did he fight in the war?).

You may have a lot of information about your focus person, but pick a single piece of known information to start. All research questions require a Person of Interest (POI), a known event that includes a date and place, and the interrogatory (who, what, where, when, and why).

Example (identity): William H. H. Link died February 1913 in Allegheny County, Pennsylvania. When and where was he born?

Example (relationship): William H. H. Link died February 1913 in Allegheny County, Pennsylvania. Who were his parents?

Example (event): William H. H. Link died February 1913 in Allegheny County, Pennsylvania. Did he fight in the Civil War?

Identifying your known information

Put only enough information in the RQ to define your POI uniquely, not too much and not too little. First, make sure your POI, your starting person, is correctly identified. Example: I have an ancestor born to a Swedish couple, Nils Nilsson and Johanna Svensdotter. The parents were clearly named in the birth record. The problem was that there were three couples in the parish with those names and two even lived on the same farm! I had mistakenly assigned my ancestor to the wrong couple. If I had pursued the parents of that couple, that branch of my tree would have been wrong. I recrafted my RQ to identify the parents of the child, and with work, the problem was solved.

Identifying the three types of research plans and their application

While we usually focus on a record-based research plan, let's consider two others that need to be addressed before we look for records: the Process Plan and the Broad Context Plan.

The **Process Plan** addresses the methodology to solve the problem. It's the steps you will go through to solve the problem. This is often the first plan you make when looking at a tough problem.

The **Broad Context Plan** identifies topics which may yield information to assist in interpretation of the documents, but probably won't include the names of your ancestors. This type of plan might not be initially necessary for a geographic area you know well, but as you implement your Record Collection Plan, topics may arise that you hadn't considered before, which deserve study.

Record Collection Plan is most likely what we think of when asked to build a "research plan." It contains the references to documents that might contain information germane to answering our research question. It is usually a short list, four or five items. We usually revise this plan continually as we conduct the investigative process.

Application

If your strategic goal is consistency of evidence, consider this. I have an Ancestry tree for my direct line ancestors, but user-generated online trees assume that the reader will understand how you established the relationship between generations of each ancestor. I want to prove each ancestral relationship. I first identify an ancestor (I started with my parents.), craft a research question and identify all my known information that addresses the research question.



S304

Jill Morelli, CG, CGL
Research Planning: The First Step to Solving Tough Problems

For example, I have five sources providing direct evidence attesting to her birth parents, but I discovered I was missing her birth certificate! That now forms my Record Collection Plan for my mother’s relationship to her parents. Because I have worked so much on this line, I have little need for a Broad Context Research Plan or a Process Plan. Next, I looked at my father’s parents and after that would be my grandparents and the relationship with their parents, and so on ...

Yvette Hoitink, in her blog, *Dutch Genealogy*, (see Resources) has devised a way to look at the consistency of her collection of evidence visually.

Here is the key to the elementary chart below:

- Green: I have all information and I have written up a biography
- Yellow: I have some missing data of the “Big US 4.” The lighter the color the less I have.
- Red: I only have a name.
- Grey: Person is unidentified.

Søren Jacobson	Christina Christiansen	Bengt Peter Anderson	Johanna Jönsdotter	Hendrick Bode		Obbo Berg	Aukea Rykena
Chris Jacobson		Emma Anderson		John Bode		Carrie Berg	
Harold Jacobson				Gertrude Bode			
Jill Morelli							

This could also be illustrated as a fan chart.

If, on the other hand, your strategic goal is to solve a tough problem: The approach for solving the problem is more complex. You might need all three types of plans:

1. You might create a Process Plan first. (See Resources, Marsha Hoffman Rising) For example: a problem of multiple same-named individuals:
 - a. Identify all same-named individuals in a 50-mile radius;
 - b. Research each one, eliminating those who do not comply with the known facts;
 - c. Resolve any conflicts related to the one individual left standing;
 - d. Assess the strength of that selection and decide whether to move forward or not.
2. You might be in an unknown geographic area and need to create a Broad Context Plan. What records are available and where are they located? Would some research in the occupation or military be helpful? Would learning about the record-keeping of his religion help?
3. Now, create a Record Collection Plan, identifying additional/missing records that would confirm or deny your selection.

Tip: Choose one problem at a time and focus on it.

#NGS2024GEN



S304

Jill Morelli, CG, CGL

Research Planning: The First Step to Solving Tough Problems

Knowing when to stop

Genealogy is never really “done,” is it? There are numerous situations which may lead us to conclude our work:

1. We have answered the research question and satisfied the Genealogical Proof Standard.
2. We have external limitations (time, \$\$) which may require us to stop before we are finished.
3. We may run out of records.
4. Other priorities may intercede.
5. We may find it helpful to set the project aside for a while and let it “percolate.” Perhaps new records will come online or we have a scheduled research trip.
6. If we cannot reach a conclusion then we have not proven our case.

I hope you see that there are advantages to research planning---all three types and you know when to apply them! Research planning outlines an efficient path of discovery; it keeps you focused and flexible. As you write up your findings you gain confidence in your work. All are great outcomes.

Resources

American Ancestors. “Research Templates.” Series of forms.

<https://www.americanancestors.org/tools/research-templates>

Board for Certification of Genealogists, *Genealogy Standards, Second Edition Revised*. Chapter 3, Washington, DC: Board for Certification of Genealogists, 2021.

DeGrazia, Laura Murphy. Website, “Skillbuilding: Planning Effective Research.” From *OnBoard*, 21 (September 2015): 17–18, 23. <https://bcgcertification.org/skillbuilding-planning-effective-research/> Excellent.

FamilySearch. “Basic Genealogical Research Plans.”

https://www.familysearch.org/en/wiki/Basic_Genealogical_Research_Plans_-_International_Institute

Hoitink, Yvette, *Dutch Genealogy*, blog, a series of posts, search for “level up.”

<https://www.dutchgenealogy.nl/six-levels-ancestral-profiles/>

Ingle, Cyndi. *Cyndi’s List*. “Charts & forms > Research Plans, Charts & More.”

<https://www.cyndislist.com/charts/research/>

Jones, Thomas, *Mastering Genealogical Proof*. Nashville: National Genealogical Society, 2013. Outlines how to craft a strong research question.

Mills, Elizabeth Shown, *Evidence Explained, Citing History Sources from Artifacts to Cyberspace. 4th edition*. Baltimore: Genealogical Publishing, 2024. I haven’t received my copy yet, but by the time of the conference I will have!

Morelli, Jill, “Write As You Go! A Methodology for Efficient Report Writing.” *Family Tree Webinars* (\$). <https://familytreewebinars.com/webinar/write-as-you-go-a-methodology-for-efficient-report-writing/> A methodology for combining all three research plans in a single written report.

Rising, Marsha Hoffman. *The Family Tree Problem Solver, 3rd Edition*. Cincinnati: Family Tree Books, 2019. Addresses strategies for solving typical genealogical problems.

Search | Learn | Teach



S305

Katy Rowe-Schurwanz

Discover Your Paternal Heritage and Expand Your Family Tree with Y-DNA

Discover Your Paternal Heritage and Expand Your Family Tree with Y-DNA

Katy Rowe-Schurwanz

Product Owner, FamilyTreeDNA

What is Y-DNA?

Y-DNA tests examine the Y chromosome, which is only found in genetic males. The Y chromosome is passed down intact from father to son, generation after generations.

How can Y-DNA help your genealogy research?

Because there are few to no changes as the Y chromosome is passed down, this allows you to trace patrilineal lineages back further than autosomal DNA which divides and randomly recombines while passed down.

Before you embark on your Y-DNA genetic journey, determine your goal for testing. Different Y-DNA tests can help with different goals. You will also want to determine who the best candidate for testing is. You will always need to find a male descended patrilineally from the line you wish to test.



S305

Katy Rowe-Schurwanz

Discover Your Paternal Heritage and Expand Your Family Tree with Y-DNA

Which level of Y-DNA testing is best for your goal?

FamilyTreeDNA is the only direct-to-consumer genetic genealogy company that provides Y-DNA testing. FamilyTreeDNA provides three levels of Y-DNA specific testing. The more of the Y chromosome tested, the more recent your matches share a common ancestor with you and the more of your father's story you can discover.

Y-37 tests the least amount of your Y chromosome. This test is really an entry level shot in the dark to see what you can discover. It's also good for confirming if two or more men match before upgrading them to a higher level to get more granular information.

Y-111 tests all of the genealogically relevant STRs and can refine matches for a better Time to Most Recent Common Ancestor (TMRCA) estimate. You may be able to confirm a specific surname with this test, and potentially even which branch of that surname if enough testers from it have Y-DNA results. It provides more detailed information for you and for Group Project administrators to place you in the project.

Big Y-700 is the test that is going to determine who your closest matches are, provide the best TMRCA estimate, distinguish between different lines of the same surname,



S305

Katy Rowe-Schurwanz

Discover Your Paternal Heritage and Expand Your Family Tree with Y-DNA

provide your most specific haplogroup, link your recent genealogy with ancestors who lived before the adoption of surnames, and you get lifetime analysis— your results keep improving as the database grows.

What Y-DNA reports can help break a brick wall?

The reports you will want to focus on the most here will be your Y-DNA Matches, the Time Tree, and the Group Time Tree.

What Y-DNA reports can best help discover patrilineal origins?

The reports you will want to focus on the most here will be the Country Frequency, Globetrekker, Ancient Connections, Time Tree, and Group Time Tree.

Success Stories

Constantino, Laurie. “Big Y-700 Confirms African Ancestry for “Old Jock” Perkins Family.” FamilyTreeDNA blog. 2/27/2023.

<https://blog.familytreedna.com/big-y-african-ancestry/>

Estes, Roberta. “Bennett Greenspan: Meet My Extended Family & Discover Extraordinary Deep Heritage.” DNA-Explain. 1/21/2024. <https://dna->



S305

Katy Rowe-Schurwanz

Discover Your Paternal Heritage and Expand Your Family Tree with Y-DNA

<https://dna-explained.com/2024/01/21/bennett-greenspan-meet-my-extended-family-discover-extraordinary-deep-heritage/>

Estes, Roberta. "The Ancestors are SPEAKing: An 18-Year Y-DNA Study That Led Us Home." DNA-Explain. 11/5/2022.

<https://dna-explained.com/2022/11/05/the-ancestors-are-speaking-an-18-year-y-dna-study-that-led-us-home-52-ancestors-381/>

Helpful Links

FamilyTreeDNA Help Center.

<https://help.familytreedna.com/hc/en-us>

FamilyTreeDNA Blog.

<https://blog.familytreedna.com/>

Estes, Roberta. "Y DNA Resources." DNA-Explain.

<https://dna-explained.com/y-dna-resources/>



S401

Nancy A. Peters, CG, CGL

Finding Frances: A German-American Case Study in Community, Illegitimacy, Immigration, and Interstate Migration

FINDING FRANCES: A GERMAN-AMERICAN CASE STUDY IN COMMUNITY, ILLEGITIMACY, IMMIGRATION, AND INTERSTATE MIGRATION



BOARD FOR CERTIFICATION
OF GENEALOGISTS®

Board for Certification of Genealogists® Skillbuilding Lecture

Nancy A. Peters, CG, CGL

npeters@bellsouth.net

Genealogists reconstructing families often encounter obstacles when reassembling female ancestors' lives. Immigration to the United States often complicates the research. Keys to success include researching broadly and making the most of available sources by mining them for all relevant evidence.¹ Family stories can also be helpful if clues are followed and information verified. Applying standards to the research helps genealogists come to credible kinship conclusions.

**WENDELGASS—Mrs. Frances Wendelgass, aged 86 years. . Monday, May 18, 1936, at the home, 87 Harvest Street. She is survived by four daughters, Mrs. Edward Grämlich, Mrs. George Frankenberg, Mrs. Jacob LeFrois and Mrs. Dorothy Blum; one son, Anthony Wendelgass; 20 grandchildren; 17 great-grandchildren; one brother and one sister. Deceased was a member of the L. C. B. A., the Sacred Heart Society and the Rosary Society.
—Services Friday morning at 8:30 from the home and at 9 o'clock at St. Francis Xavier Church.**

Figure 1: Rochester (N.Y.) Times Union, 20 May 1936, p. 32, col. 6. Courtesy of Rochester Public Library.

Starting-Point Information

Frances Wendelgass died in 1936 in Rochester, Monroe County, New York. Her obituary and death certificate report she was eighty-six, born in Germany, and had five living children. She was the matriarch of a family, which included twenty grandchildren and seventeen great-grandchildren. She was known to her descendants as the daughter of Killian Balbach and an unknown mother. Can we rely on the accuracy of death certificate and obituary information about a woman's life?

Research Questions and Planning

In a research project's first steps, we evaluate what is known about a subject and determine what we want to find out. We write a specific research question and an efficient plan for gathering information. The question directs our efforts so we stay focused. Genealogical standards give guidance. A good research question is

- specific to the research subject and the unknown sought-after information,
- sufficiently broad to be answerable, and
- sufficiently focused to be testable.²

A research plan requires a sound starting-point basis and must be flexible—adjusted when new findings are discovered as work progresses.³ See References #4 (DeGrazia) and #6 (Henderson).

1. Board for Certification of Genealogists, *Genealogy Standards*, 2nd ed., rev. (Nashville, Tenn.: Ancestry.com, 2021), 24–25, Standard 40, “Evidence mining”; and 25, Standard 41, “Evidence scope.”

2. *Ibid.*, 11–12, Standard 9, “Planned research”; and Standard 10, “Effective research questions.”

3. *Ibid.*, 12, Standard 11, “Sound basis”; and 14, Standard 16, “Flexibility.”

© Copyright 2024 Nancy A. Peters. All rights reserved.

#NGS2024GEN



S401

Nancy A. Peters, CG, CGL

Finding Frances: A German-American Case Study in Community, Illegitimacy, Immigration, and Interstate Migration

Family Stories

If we are fortunate, we have family stories to draw on—sources genealogists scrutinize for relevant clues. Similar to other source types, stories can be evaluated and reliability assessed. Frances’s case illustrates the importance of verifying undocumented family lore. See References #9 (Miller) and Case Studies #21 (Peters), #22 (Wilcox).

Migration Factors

Most genealogists are familiar with the concepts of “push” and “pull” factors that affected migrating ancestors. Reasons for ancestors leaving their homeplace are complex. It’s difficult to generalize. However, several migration theories have developed. For example, Everett S. Lee, a twentieth-century sociologist and demographer, broadly defines migration as “a permanent or semi-permanent change of residence” with no restriction on distance, time, or whether the act is involuntary as in cases of enslaved persons’ forced removals.⁴

Key Strategies Used in the Case

- Work backward in time from known to unknown.
- Mine a broad range of sources.
- Analyze documents and correlate evidence as you research.
- Extend research beyond immediate family.
- Seek out and verify family stories.
- Consider community context.

“In America we can say that migration is a part of our way of life. We are all but a few generations removed from our immigrant ancestors . . .”

—Everett S. Lee⁵

Lee states four factors affect migration decisions.

- Conditions in the area of origin
- Conditions in the area of destination
- Intervening obstacles
- Personal factors⁶

Every factor has a potential to keep people in an area, attract people to a new area, or force people away from an area. Some factors apply universally. Others are unique to an individual.

Contextual Analysis

Ancestors did not live in isolation. They were affected by cultural, economic, historical, legal, religious, political, and social factors in their communities.⁷ Understanding the context of past lives helps us analyze records and develop and test hypotheses about an ancestor’s origins and birth family. See References #3 (Daniels), #7 (Henningfield) and Case Studies #15 (LaRue), #17 (Mills), #19 (Nelson), #20 (Peters), #21 (Peters).

Identifying Frances’s Origins

The case study identifies the specific birthplace and mother of a German-born nineteenth-century woman. Research was complicated by

- a death certificate with inaccurate information,
- early widowhood,
- family migration across three U.S. states,
- immigration to the U.S. as a young child, and
- an unmarried birth mother.

“Follow the male is a basic principle in tracing all females.”

—R. M. Lennon and E. S. Mills⁸

4. Everett S. Lee, “A Theory of Migration,” *Ekistics* 23, no. 137 (April 1967): 212.
 5. Everett S. Lee, “The Turner Thesis Reexamined,” *American Quarterly* 13 (Spring 1961): 79.
 6. Lee, “A Theory of Migration,” 212.
 7. *Genealogy Standards*, 36–37, Standard 64, “Background information.”
 8. Rachal Mills Lennon and Elizabeth Shown Mills, “Mother, Thy Name is Mystery! Finding the Slave Who Bore Philomene Daurat,” *National Genealogical Society Quarterly* 88 (September 2000): 224.

© Copyright 2024 Nancy A. Peters. All rights reserved.

#NGS2024GEN



S401

Nancy A. Peters, CG, CGL

Finding Frances: A German-American Case Study in Community, Illegitimacy, Immigration, and Interstate Migration

The case was solved by understanding German-American communities' social context and by correlating information mined from a wide range of records. Sources included censuses (state and federal), cemetery, court, family stories, immigration, land, newspapers, Ortsfamilienbücher (town family books), probate, tax, religious, and vital records. See Case Studies #21 (Peters).

Lessons from the Case Study

- Verify all assertions, including information in official documents.
- Research all the couple's children and their spouses.
- Read newspapers and social histories for background on the ancestral community.
- Investigate individuals in the community because people migrate in groups.
- Be aware of migration and settlement factors for the ancestral ethnic group.
- Identify and research members of the ancestor's extended social network.

FOR FURTHER STUDY

Websites were viewed 15 February 2024. Issues of the National Genealogical Society Quarterly are available to NGS members at https://www.ngsgenealogy.org/ngsq/ngsq_archives/ (requires member login).

References

1. Board for Certification of Genealogists. *Genealogy Standards*. 2nd ed., rev. Nashville, Tenn.: Ancestry.com, 2021.
2. Bockstruck, Lloyd de Witt. *American Settlement and Migrations: A Primer for Genealogists and Family Historians*. Baltimore: Clearfield Co., 2017. This slim volume covers the colonial and federal periods up to the late 1800s. It makes an admirable attempt at a vast subject. Not a comprehensive treatment, it is a survey with suggested readings for further study.
3. Daniels, Roger. *Coming to America: A History of Immigration and Ethnicity in American Life*. 2nd ed. New York: Harper Perennial, 2002. Separate sections cover various ethnic groups.
4. DeGrazia, Laura Murphy. "Planning Effective Research." *OnBoard* 21 (September 2015): 17–18, and 23. Available online at *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-planning-effective-research>.
5. Evans, Stefani. "Evidence Correlation." *OnBoard* 18 (September 2012): 21–23. Available online at *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-evidence-correlation>.
6. Henderson, Harold. "Ten-Minute Methodology: How to Ask Good Research Questions." Blog post, 28 January 2016. *SpringBoard*. <https://bcgcertification.org/ten-minute-methodology-how-to-ask-good-research-questions>.
7. Henningfield, Melinda Daffin. "The Role of Background Context in Document Analysis." *OnBoard* 23 (January 2017): 1–2. Available online at *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-context-document-analysis>.
8. Jones, Thomas W. "Reasoning from Evidence." Elizabeth Shown Mills, ed. *Professional Genealogy: Preparation, Practice & Standards*. Baltimore, Md.: Genealogical Publishing Co., 2018. Pages 267–92.
9. Miller, Gail Jackson. "Finding the Truth in the Undocumented Story." *OnBoard* 23 (September 2017): 21–22. Available online at *Board for Certification of Genealogists*. <https://bcgcertification.org/skillbuilding-truth-in-undocumented-story/>.

© Copyright 2024 Nancy A. Peters. All rights reserved.

#NGS2024GEN



Case Studies Featuring Family Reconstruction and Identifying Females

10. Anderson, Worth Shipley. “Recovering the Identity of Barsheba (Morris) Johnson of North Carolina and Eastern Tennessee.” *National Genealogical Society Quarterly (NGSQ)* 107 (March 2019): 43–54. Unique personal characteristics and timeline comparisons for Barsheba’s husband and siblings place her in the correct birth family.
11. Giroux, Amy Lerner. “The Many Names of Frances Ellsworth: Unraveled Evidence Identifies a Birth Name.” *NGSQ* 109 (December 2021): 283–307. Winner of the 2020 NGS Family History Writing Contest. Reconstructing three generations from records found in ten states.
12. Henningfield, Melinda Daffin. “A Family for Mary (Jones) Hobbs Clark of Carroll County, Arkansas.” *NGSQ* 107 (March 2019): 5–30. Available online at *Board for Certification of Genealogists*. https://bcgcertification.org/wp-content/uploads/2020/06/Henningfield-NGSQ_107-1_Mar2019.pdf. Combined DNA and documentary evidence leads to the birth family of a female left behind when family migrated West. 2019 *NGSQ* Award of Excellence.
13. Ingalls, Kay Germain. “*Cherchez la Femme!* Looking for Female Ancestors.” *NGSQ* 88 (September 2000), 165–78. Although written two decades ago, the advice about identifying females still applies. Part of a special *NGSQ* issue on “Reassembling Female Lives.”
14. King, Ricki. “Separating Identities of Two Hattie Campbells of Marion and Ralls Counties, Missouri, Reveals Hattie King’s Mother.” *NGSQ* 110 (December 2022): 265–73.
15. LaRue, Nicole Gilkison. “A Woman of Many Names: Henrietta Dixon of Baltimore City, Maryland.” *NGSQ* 108 (September 2020): 183–93.
16. Lennon, Rachal Mills and Elizabeth Shown Mills. “Mother, Thy Name is Mystery! Finding the Slave Who Bore Philomene Daurat.” *NGSQ* 88 (September 2000): 201–24. Available online at *Historic Pathways*. <https://www.historicpathways.com/download/philodurat.pdf>. Although focused on an enslaved woman, the methodology applies to identifying all females.
17. Mills, Elizabeth Shown. “Louis Monet’s Daughters Dorothee and Dorothee: Sorting Tri-Racial Roots of Two Same-Named, Previously Merged, Colonial-Born Freedwomen.” *NGSQ* 109 (June 2021): 85–110. Available online at the author’s website, *Historic Pathways*. <https://www.historicpathways.com/download/Dorothee%20MonetMillsNGSQ109.pdf>.
18. _____. “Testing the FAN Principle Against DNA: Zilphy (Watts) Price Cooksey Cooksey of Georgia and Mississippi.” *NGSQ* 102 (June 2014): 129–52. Identifying the parents of a woman who died in the 20th century using the FAN principle and mitochondrial DNA.
19. Nelson, Lynn. “Was Leonard Baumgardner (1755–1839) of York, Pennsylvania, the Father of Anna Maria “Mary” Wehrly Meyers (1791–1852)? Using Conflict Resolution to Establish Identity.” *NGSQ* 111 (December 2023): 278–88. Multiple naming conflicts are resolved for a woman of German heritage.
20. Peters, Nancy A. “A Birth Family for Sophia Corine (Dyches) Rowell of Barnwell County, South Carolina: A Case of Forgotten Identity.” *NGSQ* 111 (March 2023): 35–57. The case study reconstructs a young widow’s forgotten birth family despite shifting forenames, multiple migrations away from the homeplace, and family dispersion across the United States.
21. _____. “The Origin and Descendants of Frances (Schreiner a.k.a. Balbach) Wendelgass of Bavaria, Indiana, Kentucky, and New York.” *The Genealogist* 38 (Spring 2024). Publication pending.
22. Wilcox, Shirley Langdon. “John Porter Langdon: One of Four Brothers to Settle in California.” *NGSQ* 109 (September 2021): 217–236. Family documents help reconstruct a family and trace its westward migration to California in the 1850s.

© Copyright 2024 Nancy A. Peters. All rights reserved.



S403

C. Ann Staley, CG, CGL
Complete Census Research: Evaluating the Whole Schedule



Complete Census Research: Evaluating the Whole Schedule

C. Ann Staley, CG®, CGLSM
Jacksonville, FL 32222
Email: ann@cannstaley.com
Website: <http://cannstaley.com>

Taking Census. [Between 1918 and 1920] Photograph.
Retrieved from the Library of Congress.
<https://www.loc.gov/item/2016819972/>

Censuses – Basically, a census is an enumeration of people or things that were created to enumerate or make a count of them for a specific purpose. Usually, they are conducted for taxation, studies of population trends, determination of Congressional representation, and determining the military strength of a country. I have even seen a partial census of boats in Florida taken by the WPA in 1938.

1. "About Census Records. Introduction to Census Records." *National Archives*.
<https://www.archives.gov/research/census/about>
2. "Census." *Britannica*. <https://www.britannica.com/science/census>
3. "Census." *Wikipedia*. <https://en.wikipedia.org/wiki/Census>
4. "Economic Census." *United States Census Bureau*.
https://www.census.gov/history/www/programs/economic/economic_census.html
5. "Florida Merchant Marine Survey, 1936-1939." *Florida Memory*.
https://www.floridamemory.com/discover/historical_records/florida_merchant/
6. "Our Surveys & Programs." *United States Census Bureau*. <https://www.census.gov/programs-surveys.html>
7. "United States Census." *Wikipedia*. https://en.wikipedia.org/wiki/United_States_census
8. "United States Census." *FamilySearch*. https://www.familysearch.org/en/wiki/United_States_Census
9. "United States Census Bureau." *Wikipedia*. https://en.wikipedia.org/wiki/United_States_Census_Bureau

Census Day/Date vs Enumeration Day/Date – The census day, or date, is the official census date – all information supplied to the census enumerator was supposed to be "as of" that date. If a child was born after that date, he was not to be counted; the child was not a household member on the "census day." The enumeration day/date, however, is the day/date that the enumerator actually came and questioned the household. Usually, a time limit was also placed on the taking of the census so that a "snapshot" in time could be taken.

10. "United States Federal Census Dates." *FamilySearch*.
https://www.familysearch.org/en/wiki/United_States_Federal_Census_Dates

Some census records that might be available for your research area

- Colonial Census – Most covered the occupiers' small area of occupation only.
- Territorial – Taken of a territory before the area becomes a state
- Federal
 - 1790–1880, 1900–1950
 - 1890 (only fragments remain)
- Special Federal Censuses
 - 1800–1880, 1885 – Industry and Manufacturing
 - 1840 – Census of Pensioners for Revolutionary War Military Service
 - 1850–1880, 1885 – Mortality Schedules
 - 1850 & 1860 – Slave Schedules
 - 1850–1870 – Social Statistics
 - 1850–1880, 1885 – Agriculture Schedule
 - 1880–Defective, Dependent, Delinquent Classes
 - 1885–1950 – American Indian
 - 1890–Union Veterans and Widows of Union Veterans of the Civil War
- State Census- usually taken in the years between the U.S. Federal Census
- City and/or Town Census
- School Census – enumeration of students

©2023, C. Ann Staley. Complete Census Research. All rights reserved. Please do not duplicate.

#NGS2024GEN



S403

C. Ann Staley, CG, CGL
Complete Census Research: Evaluating the Whole Schedule

11. "American Community Survey (ACS)." *United States Census Bureau*. <https://www.census.gov/programs-surveys/acs>
12. Blake, Kellee. "First in the Path of the Firemen: The Fate of the 1890 Population Census." Parts 1 and 2. *Prologue*, Spring 1996, Vol. 28, No. 1. *National Archives*.
<https://www.archives.gov/publications/prologue/1996/spring/1890-census-1.html>
13. Dollarhide, William. *Census Substitutes & State Census Records*. 3 volumes. Second Edition. Bountiful, UT: Family Roots Publishing Co., 2016 [Vol. 1 Eastern States, Vol. 2 Central States, Vol 3 Western States and National].
14. ———. *[State] Name Lists [Dates] With a Selection of National Name Lists [Dates]: An Annotated Bibliography of Published and Online Name Lists*. Bountiful, UT: Family Roots Publishing Co., [various dates].
15. ———. *[State] Name Lists Published and Online Censuses & Substitutes [Dates] With a Selection of National Name Lists [Dates]*. Bountiful, UT: Family Roots Publishing Co., [various dates].
16. ———. *The Census Book: Genealogists Guide to Facts, Schedules and Indexes*. Bountiful, Utah: Heritage Quest, 1999.
17. ———. *Substitutes for the Lost 1890 U.S. Federal Census*. Orting, Washington: Family Roots Publishing Co., LLC, 2019.
18. Dubester, Henry J. *State Censuses: An annotated bibliography of censuses of population taken after the year 1790 by States and Territories of the United States*. 1948. Reprint, Knightstown, IN: The Bookmark, 1990.
19. Hinckley, Kathleen W. *Your Guide to the Federal Census for Genealogists, Researchers, and Family Historians*. Cincinnati, Ohio: Betterway Books, 2002.
20. Lainhart, Ann S. *State Census Records*. Baltimore, Maryland: Genealogical Publishing Co., 1992.
21. Powell, Kimberly. "Agricultural Schedules of the United States Census: Researching Farms & Famers in the U.S. Census." *ThoughtCo*. <https://www.thoughtco.com/agricultural-schedules-united-states-census-1422758>
22. "State Censuses." *United States Census Bureau*.
https://www.census.gov/history/www/genealogy/other_resources/state_censuses.html#:~:text=%20State%20censuses%20often%20can%20serve,elsewhere%20in%20the%20federal%20schedules
23. Stickney, Clyde P. "A Note of U.S. Federal Census Research." *The Florida Genealogist*, Vol. XXXVI, No. 2. Florida: Florida State Genealogical Society, 2013.
24. *U.S. and Special Census Catalog: An Invaluable Aid to Genealogical Research*. Salt Lake City, UT: Ancestry, n.d.
25. United States Census Bureau. *Measuring America: The Decennial Censuses from 1790-2000*. Washington, DC: U.S. Government Printing Office, 2002. [Also available as:
https://www2.census.gov/library/publications/2002/dec/pol_02-ma.pdf]
26. United States Department of Commerce. *200 Years of U.S. Census Taking: Population and Housing Questions 1790-1990*. 1989. Reprint, Bountiful, UT: AGLL, 1996.

Concerns to be careful of:

- Some enumerations are missing, not complete, or have been lost/destroyed.
 - 1790 census for DE, GA, KY, NJ, TN & VA were destroyed or lost - "Substitutes" have been made from tax lists
- Some people gave false information.
- The handwriting of the enumerator is not legible.
- The ink has faded through the years
- Names are "misspelled".
- Some given names are abbreviated or only initials are written,
- Families are in house order; not alphabetical order,
- The enumerator may not have gone to every house
- Indexes have a good percentage of errors; look for all possible, spellings of surnames.

Census Indexes

- Printed – Published by companies, individuals, and organizations.
- Soundex - Available for Federal censuses of:
 - 1880 – Head of Household with children 10 and under



S403

C. Ann Staley, CG, CGL
Complete Census Research: Evaluating the Whole Schedule

- 1900 – Head of Household completely soundexed
- 1910 – Available for 21 states
 - AL AR CA FL GA IL KS KY LA MI MS MO NC OH OK PA SC TN TX VA WV
- 1920 – Head of Household completely soundexed
- 1930 – Available for 10 states
 - AL AR FL GA LA MS NC SC TN VA (Partial: KY and WV)
- Online – Free and subscription
- 27. “Research Our Records – The Soundex Indexing System.” *National Archives*.
<https://www.archives.gov/research/census/soundex>
- 28. “Soundex.” *Wikipedia*. <https://en.wikipedia.org/wiki/Soundex> [Provides a history of the system with a copy of the coding used.]
- 29. “Soundex Converter.” *Maine Genealogy*. https://www.maine-genealogy.net/soundex_converter.asp
- 30. Steuart, Bradley W., editor. *The Soundex Reference Guide*. Bountiful, UT: Precision Indexing, 1990.
- 31. Burroughs, Tony. “The Original Soundex Instructions” *National Genealogical Society Quarterly* 89:4 (December 2001): 287-298.
http://www.tonyburroughs.com/uploads/1/3/2/8/13281200/the_original_soundex_instructions_t-burroughs.pdf

Census Index Strategy

- Look for all possible spellings of surnames. How does it sound?
- Check for double characters – BBrown.
- Check for transposed characters – Simth
- Check for other transposed characters – Dmith. Think about where the letters are on the keyboard
- Check for abbreviations.
- Check for switched names - John Johnson as Johnson John.
- Most often the handwriting is not legible. These are just a few examples of letters that can be confused:
 - n & u ys & ip a & o s & p
 - e & r & i o & e t & l & i S & L & T
- The search box does not have to be filled in. Start with less information; add more to filter your search.
- 32. Dollarhide, William. “Census Mistakes.” *GenealogyBlog*. <https://www.genealogyblog.com/?p=18199>
- 33. Saldana, Richard H. *Practical Guide to the "Mistakes" Made in Census Indexes*. Bountiful, Utah: American Genealogical Lending Library, 1987.

Census Strategy

- Start with the census closest to the marriage of your ancestor.
- Go forward in time finding all of the children and/or new marriages.
- Go backward in time to find parents, siblings, etc.
- Search 5 pages before and 5 pages after “your” page for other family members and possible relatives.
- Learn all you can about the possible neighbors; look for them instead when you can’t find your ancestor. City directories can be a good source for finding the neighbors.
- Look for everyone with the same surname. Have an alphabetical list of potential surnames (direct & collaterals).
- Read the census from upper left to lower right, line by line. What is the census header telling you about the area enumerated and the questions asked?
- What is the page number? Is there more than one? Are there page numbers missing for this city/county?
- What is the census date and what is the date your family was enumerated?
- Read the lines for your ancestor(s) all the way across – from the left side to the right side.
- 34. “20 Tips for Census Research Success.” *National Archives*. <https://www.archives.gov/research/census/20-tips-for-census-research-success>
- 35. “1950 Census: Procedural Studies of the 1950 Censuses No. 2: The 1950 Censuses – How They Were Taken.” *United States Census Bureau*. <https://www.census.gov/library/publications/1955/dec/procedural-study-02.html> [The document can be found at <https://www2.census.gov/library/publications/decennial/1950/procedural-studies/study-02/00322994.pdf>]

#NGS2024GEN



36. Bradshaw, Laurie. "U.S. Census Records." *FamilySearch Blog*. <https://www.familysearch.org/en/blog/us-census-records>
37. Broderick, Lynn. "7 Ways to Avoid Commonly Made Mistakes When Using the U.S. Federal Census." *FamilySearch Blog*. <https://www.familysearch.org/en/blog/7-ways-to-avoid-commonly-made-mistakes-when-using-the-us-federal-census>
38. Franklin, Charles M. *How to get the most from your census search*. Indianapolis, IN: Ye Olde Genealogie Shoppe, 1995.
39. *Handy Tips on How to Use the United States Census Record*. Logan, Utah: Everton Publishers, Inc., [ca 1982].
40. Jenkins, Robert. "Procedural History of the 1940 Census of Population and Housing," 1983. *IPUMS USA*. <https://usa.ipums.org/usa/resources/voliii/enumproc1940.pdf>
41. Mills, Elizabeth Shown, CG, CGL, FASG, FNGS, FUGA, "Censuses—Often-Overlooked Basics," *OnBoard* 4 (January 1998): 8. <https://bcgcertification.org/skillbuilding-censuses-the-often-overlooked-basics/>
42. Morse, Stephen P. "Deciphering Miscellaneous Codes Appended to the 1940 Census in One Step." *Steve Morse*. <https://stevemorse.org/census/mcodes1940.htm>
43. Powell, Kimberly. "How to Make Sense of Census Abbreviations." *ThoughtCo*. <https://www.thoughtco.com/what-do-census-abbreviations-mean-1422760>
44. Smith, Robyn N. "4 Ways US Census Records Can Fool You." *FamilyTree*. <https://familytreemagazine.com/records/census/avoid-census-errors/>
45. "United States Census: Analyzing Census Data." *FamilySearch*. https://www.familysearch.org/en/wiki/United_States_Census_Analyzing_Census_Data
46. "United States Enumeration District Maps for the twelfth through the sixteenth US Censuses, 1900-1940." *FamilySearch*. <https://www.familysearch.org/search/catalog/4092225?availability=Family%20History%20Library>

Additional Resources

47. *AccessGenealogy*. <https://accessgenealogy.com/> [In the panel on the right-hand side, choose your research state, then review the data for available census information for that state.]
48. Baker, Donna. "Narrowing Dates Calculator." *Golden Channel Publishing*. <http://genohistory.com/2016/07/20/narrowing-dates-excel-tool/> [Free calculator form for narrowing dates for resolution.]
49. Beine, Joe. "U.S. Census Records: Tips, Resources & Online Records." *German Roots*. <https://www.germanroots.com/censuslinks.html>
50. "Worksheet for Genealogy and Family History." *CensusMate*. <http://www.censusmate.com> [Free MS Excel forms to download to organize and work with the pre-1850 censuses.]
51. *CensusTools*. <https://www.censustools.com> [Electronic spreadsheets for census data, cemetery data, research logs, passenger manifest data, and more. 40 spreadsheets for a fee.]
52. "Fast Facts." *United States Census Bureau*. https://www.census.gov/history/www/through_the_decades/fast_facts/ [A unique look at the times the censuses were taken in – statistically and culturally.]
53. Ingle, Cyndi. "Census Worldwide." *Cyndi's List*. <https://www.cyndislist.com/census-worldwide/>
54. ———. "U.S. Census." *Cyndi's List*. <https://www.cyndislist.com/us/census/>
55. Rands, Richard. "Census Analysis Worksheet." *Silicon Valley Computer Genealogy Group*. http://www.svcgg.org/documents/CensusAnalysisForm_RichardRands.pdf
56. Rhodes, Karen Packard. *Non-Federal Censuses of Florida, 1784-1945: A Guide to Sources*. Jefferson, NC: McFarland Publishers, 2009.
57. Szucs, Loretto Dennis and Matthew Wright. "Census Records." Loretto Dennis Szucs and Sandra Hargreaves Luebking, editors. *The Source: A Guidebook of American Genealogy*. Third edition. Provo, Utah: Ancestry Inc., 2006. Chap. 5, pp. 157-218. Available online at https://wiki.rootsweb.com/wiki/index.php/The_Source:_A_Guidebook_to_American_Genealogy
58. "11 Tips for Reading Old Handwriting." *FindmyPast*. <https://www.findmypast.com/blog/help/tips-for>
59. "Five Tips for Deciphering Old Handwriting." *LegacyTree Genealogists*. <https://www.legacytree.com/blog/five-tips-deciphering-old-handwriting>
60. "United States Census Forms." *FamilySearch*. https://www.familysearch.org/en/wiki/United_States_Census_Forms

All URLs accessed 29 Jan 2024



S404

Paula Williams

DNA's FAN Club: Using Shared Matches to Solve Genealogical Mysteries

DNA's FAN Club: Using Shared Matches to Solve Genealogical Mysteries

Paula Williams

pkwilliams823@gmail.com / www.paulawilliamsgenealogy.com

When doing genealogical research, a commonly used strategy is studying the “FAN Club,” as named by Elizabeth Shown Mills. Looking at not just an ancestor’s records but also at an ancestor’s FAN Club (Friends, Associates, and Neighbors) can help provide answers to our genealogical questions when direct evidence cannot. We study our ancestors in the context of their FAN Club to distinguish individuals of the same name, to identify parents, and to understand their lives.

Using DNA in our genealogical research is no different. A single DNA match rarely answers our genealogical questions. Simply searching our match lists for surnames misses much of what our DNA matches can tell us. Instead, we corroborate those matches with other matches and with paper trail research to provide the context of the results and our ancestors.

When we take a DNA test at the “big 4” testing companies used for genealogy (Ancestry, 23andMe, FamilyTreeDNA, and MyHeritage), we receive biogeographical (or “ethnicity”) estimates, and a list of people who share DNA with us as well as the amount of DNA we share with them. More importantly, the companies also provide lists of shared matches (also called “in common with” or “relatives in common”). Blaine Bettinger refers to shared matches as “our secret weapon” in solving genealogical problems.

What are Shared Matches? When viewing a specific match on your match list, the list of shared matches, by whatever name the company uses, identifies matches who share DNA with BOTH you AND the match you are viewing. There are two reasons why someone appears on the shared matches list. The first, and most common, is that you, the match you are viewing, and the shared match all share a common ancestor. A second reason, and one we do have to keep in mind, is that you and the match you are viewing share one common ancestor, the shared match, and the match you’re viewing share a second common ancestor amongst themselves, and you and the shared match share yet another common ancestor. Of course the former situation is more helpful, but in either case, these shared matches are part of our matches’ and our ancestors’ FAN clubs and can provide important clues, context, and evidence.

Smart genealogists use not just the existence of DNA matches, but HOW those matches share with you *and with each other* to verify existing research and to solve mysteries. In cases of unknown parentage or recent ancestry, grouping matches into clusters and looking for commonalities among the matches in those clusters can help identify how we fit in those clusters – just as we look for commonalities among our ancestors’ friends, associates, and neighbors in traditional research. We will explore how to use shared matches in case studies and examples during this lecture.

©2024 Paula Williams

#NGS2024GEN



S404

Paula Williams

DNA's FAN Club: Using Shared Matches to Solve Genealogical Mysteries

Though each of the companies provides shared matches, they each provide different tools for identifying and working with the shared matches.

AncestryDNA uses their SideView technology to split ethnicity estimates (and now the genetic communities) and matches by parent. The technology doesn't know which parent is which from DNA alone, but by comparing the matches and ethnicities to known matches, we can usually determine which parent is "Parent 1" and which is "Parent 2." Another powerful tool at Ancestry is their custom groups. We can create up to twenty-four color-coded groups to which we can add matches. We can then sort and filter our match list by these groups, allowing us to focus just on those groups. There are multiple approaches to using the groups, which we will explore during this lecture.

23andMe's "Family Tree" attempts to organize our closest matches based on the DNA they share with us and with each other in a tree format. When viewing this as clusters of matches rather than frustrated at the lack of perfection in a tree, we can gain insights into our matches and our ancestors. Also, their "Relatives in Common"¹ feature not only provides how much DNA you share with each of the shared matches, but also how much DNA those shared matches share with the match you are viewing. One match may have no identifying information, but their shared matches list indicates a parent, or a full sibling or other close relative who has provided enough information for you to identify both matches.

MyHeritage also identifies the amounts of DNA shared between your matches and shared matches as 23andMe does. They also provide custom grouping (called "labels") for sorting and filtering matches. Perhaps MyHeritage's standout tool is its AutoCluster feature. Developed with Evert-Jan Blom of the third-party match clustering tool Genetic Affairs (<http://geneticaffairs.com/>), AutoClusters is a networking tool that visually clusters shared matches together, allowing us to see groups of matches who match each other. We can hypothesize that members of clusters share a common ancestor, though, of course, that is a hypothesis that we would then need to verify with genealogical research.

FamilyTreeDNA has a helpful feature called Family Matching. FTDNA will sort matches into maternal and paternal "buckets" based on segments of DNA the matches share with the close matches you have linked to your tree. They also have shared matches lists (called "In Common With"). Just as helpful is their "Not in Common With" tool which will show you your matches NOT shared with a particular match. This can be helpful if you are able to test a parent or close relative from one side and want to focus on the other side of your family.

The shared matches tools allow us to focus not just on a single match, but how the DNA we share with groups of matches and how they share with each other. This can help us identify matches and ancestors and solve our genealogical mysteries.

¹ At publication time, 23andMe had temporarily disabled the Relatives in Common feature as the company continues to investigate the aftermath of a credential stuffing attack the company suffered in 2023. The latest updates can be found at the company's website at <https://blog.23andme.com/articles/addressing-data-security-concerns>.

©2024 Paula Williams

#NGS2024GEN



Selected Resources

(All URLs valid as of 4 February 2024)

23andMe. "How To Build and Edit Your 23andMe Family Tree."

<https://customercare.23andme.com/hc/en-us/articles/360045637854-How-to-Build-and-Edit-your-23andMe-Family-Tree>

Ancestry. "Grouping and Filtering AncestryDNA Matches."

<https://support.ancestry.com/s/article/Grouping-and-Filtering-AncestryDNA-Matches>

----- "How SideView™ Technology Splits Your DNA Results by Parent."

<https://support.ancestry.com/s/article/SideView-Technology>

----- "Matches by Parent." Ancestry. <https://support.ancestry.com/s/article/DNA-Matches-Split-Up-By-Parent>

----- "Shared Matches." Ancestry. <https://www.ancestry.com/cs/dna-help/matches/shared-matches>

Bettinger, Blaine. "Creating DNA Circles - Exploring the Use of 'Genetic Networks' in Genetic Genealogy." *The Genetic Genealogist*, posted 25 July 2015.

<https://thegeneticgenealogist.com/2015/07/25/creating-dna-circles-exploring-the-use-of-genetic-networks-in-genetic-genealogy/> (Note: although this involves a now defunct tool (Ancestry's DNA Circles), it still contains useful information about grouping shared matches)

----- "The DNA Era of Genealogy." *The Genetic Genealogist*, posted 17 December 2016.

<https://thegeneticgenealogist.com/2016/12/17/the-dna-era-of-genealogy/>

----- "Sub-Clustering Shared Matches." YouTube video posted 1 May 2019.

https://www.youtube.com/watch?v=6ApidzEyA_k

----- "A Triangulation Intervention." *The Genetic Genealogist*, posted 19 June 2016.

<https://thegeneticgenealogist.com/2016/06/19/a-triangulation-intervention/>

----- "Using Autosomal DNA for 18th and 19th Century Mysteries." Webinar for New York Genealogical and Biographical Society, posted 13 February 2018.

<https://www.newyorkfamilyhistory.org/>

Crawford, Shelley. "Quiz: AncestryDNA Shared Matches." *Twigs of Yore*, posted 22 June 2018.

<https://twigsofyore.blogspot.com/2018/06/quiz-ancestrydna-shared-matches.html>



S404

Paula Williams

DNA's FAN Club: Using Shared Matches to Solve Genealogical Mysteries

- Fillerup, Christy. "The Cousin Next Door: Using the FAN Club Principle." *LegacyTree Genealogists Blog*, posted 2016. <https://www.legacytree.com/blog/cousin-next-door-using-fan-club-principle>
- Johnson, Melissa A, CG. "Unknown and Misattributed Parentage Research." Debbie Parker Wayne, ed. *Advanced Genetic Genealogy*. Cushing: Wayne Research, 2019. Pages 107-126.
- Leeds, Dana. "DNA Color Clustering: The Leeds Method for Easily Visualizing Matches." *Genealogy with Dana Leeds*, posted 23 August 2018. <https://www.danaleeds.com/dna-color-clustering-the-leeds-method-for-easily-visualizing-matches/>
- Mills, Elizabeth Shown. "FAN + GPS + DNA: The Problem-Solver's Great Trifecta." *Legacy Family Tree Webinars*, posted 7 October 2016. <https://familytreewebinars.com/webinar/fan-gps-dna-the-problem-solvers-great-trifecta/>
- . "QuickLesson 11: Identity Problems & the FAN Principle." *Evidence Explained: Historical Analysis, Citation & Source Usage*. <https://evidenceexplained.com/content/quicklesson-11-identity-problems-fan-principle>
- . "QuickLesson 24: Evaluating DNA as Evidence." *Evidence Explained: Historical Analysis, Citation & Source Usage*. <https://www.evidenceexplained.com/content/quicklesson-24-evaluating-dna-evidence>
- . *QuickSheet: The Historical Biographer's Guide to Cluster Research (the FAN Principle)*. Baltimore: Genealogical Publishing Company, 2012.
- MyHeritage*. "AutoClusters for DNA Matches." <https://education.myheritage.com/article/autoclusters-for-dna-matches/>
- . "How to Use Labels to Break New Ground with Your DNA Matches." *MyHeritage Knowledge Base*, posted 14 December 2021. <https://education.myheritage.com/article/how-to-use-labels-to-break-new-ground-with-your-dna-matches/>
- Southard, Diahan. "Shared DNA Matches - the Only DNA Tool You will Ever Need." *RootsTech 2023* lecture. <https://www.familysearch.org/rootstech/session/shared-dna-matches-the-only-dna-tool-you-will-ever-need>
- Woodbury, Paul. "Fishing in Your Match List with MyHeritage DNA Tools." *Legacy Family Tree Webinars*, 23 May 2023. <https://familytreewebinars.com/webinar/fishing-in-your-match-list-with-myheritage-dna-tools/>

©2024 Paula Williams

#NGS2024GEN



S405

Robert Raymond
AI Innovations at FamilySearch



AI Innovations at FamilySearch

Robert Raymond

FamilySearch

Robert.Raymond@familysearch.org

FamilySearch has used artificial intelligence for many years to bring users additional features and many more records. This syllabus explores those features and records.

Note: This 4-page syllabus was submitted in early February 2024. A longer, more current version is available at <http://bit.ly/RRHandout>.

FamilySearch's Usage of A.I.

Two Records, One Person

FamilySearch Family Tree is meant to be a single tree of everyone who has ever been documented, with one record for each person. Duplicates inevitable arise and must be merged. FamilySearch has used machine learning for over a decade to decide if two records are duplicates. The technology calculates the probability that the two are duplicates. FamilySearch takes the matches that are most probable and presents them to users for final determination.

FamilySearch encourages Tree users to provide sources for conclusions recorded in Family Tree. FamilySearch's historical records can be used as sources. Just as FamilySearch compares each person in Family Tree with every other person, FamilySearch uses machine learning to compare each person in the Tree with every FamilySearch historical record. A match is called a hint. As with *Possible Duplicates*, FamilySearch lists the hints that are most probable and users make the final determination to attach the source or dismiss the hint. FamilySearch released hinting in 2014.

Starting in 2019 FamilySearch has used the technology to compare each historical record with every other record and present the matching records as "Similar Records."

Family Reconstitution

FamilySearch is experimenting with family reconstitution, a process where a machine learning system looks at all the records for a particular place and merges them together into a family tree. The result, to the extent the records make possible, reconstructs an entire population living in a particular place over a period of time. To see the experimental trees, click Search > Genealogies. Then rotate the carousel to the card labeled "Computer-Generated Trees." Click "View All Trees In This Collection."

Record Indexing

Perhaps the most significant use of artificial intelligence at FamilySearch is what FamilySearch calls "Computer Assisted Indexing" or "Computer Aided Indexing" (CAI). This technology is

#NGS2024GEN



S405

Robert Raymond
AI Innovations at FamilySearch

fueling publication of hundreds of millions of records with many more to come.

Born-Digital Obituaries

In 2014 FamilySearch and GenealogyBank’s parent company, NewsBank, signed an agreement allowing FamilySearch to index over a billion obituaries in GenealogyBank’s possession and post the indexes. The obituaries themselves could be viewed on GenealogyBank.com. Indicators pointed to the need for tens of thousands of volunteer indexers. FamilySearch started with obituaries provided by GenealogyBank in text format. That is to say, the obituaries originated as text typed into a computer. That year, volunteer indexers completed just 90 million names. Obituary indexing was less appealing than form-based records.

It was obvious another solution was necessary.

FamilySearch turned to machine learning. Machine learning indexed records incredibly faster than people. The first 5 million obituaries were indexed in just 10 hours, equaling the work of 150 man-years of manual indexing. Computerized indexing was faster, cheaper, and scalable, it worked on records unpopular with human indexers, and indexed more information from each. In 2015 FamilySearch published 21 million computer indexed obituaries.

Comparison by Indexing Type

Human Indexed	Computer Indexed
<ul style="list-style-type: none"> • 97.9% Accurate • Limited to most essential information • Capacity limited by # of volunteers • 1,375,000 hours to index 5.5M obituaries 	<ul style="list-style-type: none"> • 94.5% Accurate • Additional fields at no extra cost • Capacity limited by # of machines • 10 hours to index 5.5M obituaries

While human indexers make mistakes too, the computer makes more errors, some of them outrageously obvious to people. With the computer indexed records, FamilySearch provided a mechanism to easily report errors.

Obituary Images

The partnership with GenealogyBank included indexing obituaries from scanned microfilm images. The artificial intelligence used at that time required the images first be converted to text before indexing. This proved challenging.

The Didone fonts in early newspapers featured thick strokes mixed with thin strokes that often disappeared during microfilming. Off-the-shelf optical character recognition (OCR) products, which are tuned for profitable, modern content, could not handle the compromised characters. FamilySearch opted to build their own OCR.

Machine learning again came to the rescue, proving itself able to reliably read difficult newspaper images. By November 2019 FamilySearch had published hundreds of thousands of obituaries originating from images.

Handwriting Recognition

FamilySearch Indexing, driven by human indexers, has proven successful for indexing uniform, English-language records. But indexers have proven unwilling to index handwritten, paragraph-style records, particularly those in non-English languages. So despite the high global demand

#NGS2024GEN



S405

Robert Raymond
AI Innovations at FamilySearch

for records such as Spanish baptism records, as of a few years ago FamilySearch had published very few.

Having tackled the challenge of printed historical obituary images, FamilySearch turned its growing compendium of A.I. technologies to the problem of Spanish baptism records.

The solution comprises these steps for publishing a handwritten paragraph-style record:

1. Classify the image according to record type.
2. Divide the image into zones corresponding to each baptism record.
3. The Segmenter splits a record into lines and regions suitable for the Recognizer.
4. For each symbol in the segment, the Recognizer estimates the probable character.
5. The Language Modeler corrects and adjusts predicted characters based on examples of valid language and the most likely words.
6. The Named Entity Recognizer takes the text from the previous step and identifies different words (“entities”) as people, dates, places, numbers, etc.
7. The Relationship Extractor determines relationships among the entities.
8. The Record Creator assembles the information into a FamilySearch record.
9. The record is published, where it can be searched and accessed.
10. The record is made available in Get Involved for human review.

Once the Spanish baptism process was stable, FamilySearch made it automatic. Within hours of a camera operator clicking the camera shutter, the image is published on FamilySearch.org, is indexed, and becomes name searchable!

FamilySearch has done some computer indexing for Spanish, Portuguese, and English paragraph style records. More languages and record types are planned for the future.

Image to Record

FamilySearch is working on the ability to combine most of the CAI steps. The deep learning system is given an image and produces the record directly.

Reviewing and Correcting

Each computer indexed record is flagged for human review. *Get Involved* is the review tool. Review can be done on FamilySearch.org or via the Get Involved app, which is available for Android or iPhone.

1950 U.S. Census

In 2022 FamilySearch partnered with Ancestry to index, review, and publish the 1950 U.S. Census. Ancestry used proprietary artificial intelligence handwriting recognition to produce the initial index. FamilySearch and volunteers reviewed and revised the entire index.

Full-Text Experiment

The Relationship Extractor step—the one that determines Mary is John’s wife and that 19 February 1919 is the date he was baptized—is very expensive. FamilySearch asked itself, “What if we left out that step?” Entities would still be identified, but the relationships among them would be unknown.

Earlier this year FamilySearch released an experimental search experience utilizing this

#NGS2024GEN



S405

Robert Raymond
AI Innovations at FamilySearch

approach. FamilySearch added full transcription search and display. The keyword search field searches every word in the transcription. To try the experiment, go to <https://familysearch.org/labs>.

The experiment includes many U.S. land and probate records as well as Mexican notarial and will records. This full-text search experiment enables searches you can't normally do.

- Because these records are indexed by computer, FamilySearch indexed record types that human indexers avoid, such as paragraph-style records.
- Because the collections are full text, they also include all names.
- Because the collections are full text, you can identify people using attributes that aren't searchable in a normal collection, such as occupation or hometown.
- Because the collections are full text, you can search for things such as landmarks.
- Because land and probate records track property, and because one can specify any word occurring in the record, these collections are important for researching antebellum enslaved African Americans.

A particularly powerful approach for finding records about an enslaved person is to specify their first name (since family names were rare), a name of an enslaver or plantation, a locality, and a common keyword associated with enslaved persons.

Hurtful Content Warning

Researching African American genealogy exposes one to records of racism, violence, and moral corruption. Searching the records may require use of hurtful and inappropriate terminology. Neither I, nor FamilySearch, condones racism, violence or the use of hurtful and inappropriate terminology outside of its necessary use in research.

As you use these records, you will become familiar with keywords associated with African Americans. Some of them are *negro*, *negress*, *of color*, *black color*, *colored man*, *colored woman*, *colored girl*, and *colored boy*. Use these terms to find records of enslaved people.

Conclusion

FamilySearch has used the power of artificial intelligence for many years for tasks such as duplication checking in Family Tree, hinting, and identification of similar records. FamilySearch uses artificial intelligence to speed up the indexing of records. It continues to find new and innovative uses for artificial intelligence, such as family reconstitution and full text searching of paragraph style, handwritten records.

References and Resources

For references and resources, see the long syllabus at <http://bit.ly/RRHandout>.

© 2024 by Intellectual Reserve, Inc. All rights reserved. No part of this document may be reprinted or reproduced in any form for any purpose without prior written permission.

2024-02-03



S501

David Ouimette, CG, CGL
Submitting a Successful Certification Portfolio

Submitting a Successful Certification Portfolio

Board for Certification of Genealogists® Skillbuilding Lecture

David Ouimette, CG, CGL

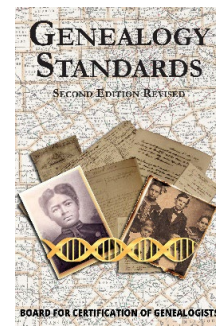
david.ouimette@familysearch.org

You are striving to become a Certified Genealogist but the application process seems intimidating. How do you know whether your portfolio is good enough? Let's demystify the process by reviewing how judges will evaluate your work.

#NGS2024GEN

- **Genealogy Standards**

- How you do sound genealogical research:
 - Ch. 1—The Genealogical Proof Standard (GPS)
 - Ch. 2—Standards for documenting
 - Ch. 3—Standards for researching
 - Ch. 4—Standards for writing
 - Ch. 6—Standards for continuing education
 - The Genealogist's Code of Ethics



- <https://bcgcertification.org/product/genealogy-standards-2d-edition/>

- **The BCG Application Guide**

- How you assemble your portfolio:
 - Development activities
 - BCG-supplied document work
 - Research report prepared for another person
 - Case study: conflicting, indirect, or negative evidence
 - Kinship-determination project



- <https://bcgcertification.org/process/app-guide/>

- **Rubrics for Evaluating New Applications for BCG Certification**

- How judges evaluate your work:
 - Development activities
 - BCG-supplied document work
 - Research report prepared for another person
 - Case study: conflicting, indirect, or negative evidence
 - Kinship-determination project

Component	Excellent	Good	Fair	Needs Improvement	Not Satisfactory
Development Activities
BCG-supplied Document Work
Research Report Prepared for Another Person
Case Study: Conflicting, Indirect, or Negative Evidence
Kinship-determination Project



S501

David Ouimette, CG, CGL
Submitting a Successful Certification Portfolio

What are the rubrics for judging your portfolio?

Judges evaluate your development activities, document work, research report, case study, and kinship-determination project by clearly defined rubrics based on standards.

For example, your case study, research report, and kinship-determination project are each judged for “quality of evidence,” a rubric designed to assess compliance with Standards 35–39, 44, and 58 (bullet 3). The work product is judged to “meet standards” for “quality of evidence” if “evidence is drawn from reliable sources and information, and the use of any weak evidence is logically defended.” The work product “partially meet standards” for “quality of evidence” if “some evidence is drawn from reliable sources and information, but the high credibility of several items is not recognized, or a few items of low credibility are used without justification.” The work product “does not meet standards” for “quality of evidence” if “much evidence is drawn from unreliable sources and information without any justification.”

Are judges your friends or foes?

Judges apply their expertise dispassionately, identifying whether you meet, partially meet, or do not meet standards. Accurate feedback is the goal. Judges are your friends because they provide honest, independent, and expert assessments of your work, helping you elevate your craft.

Judging development activities

You demonstrate that you have engaged in a variety of educational activities (e.g., genealogy conferences, institutes, and workshops) to improve your genealogical skills and understanding. You are judged on your “engagement in development activities,” a rubric based on Standards 89 and 90.

Judging document work

BCG supplies you with a historical document pertaining to the place, timeframe, and language you specified in your preliminary application as your area of focus. You are instructed to produce a transcription and genealogical abstract of the document, propose a single research question, analyze the document in terms of your research question, and provide a research plan. Your transcription and abstract are judged for



S501

David Ouimette, CG, CGL
Submitting a Successful Certification Portfolio

accuracy and completeness. Your analytical skills are judged, as well as the efficiency of your proposed research plan. You are judged per these ten rubrics:

- Accuracy of transcription
- Completeness of transcription
- Accuracy of abstract
- Completeness of abstract
- Adequacy of citation
- Analysis of reliability
- Analysis of background context
- Analysis of information relevance and soundness of presumptions
- Efficiency of research plan

Judging the research report

You submit a research report that you prepared for another person. The report must satisfy certain conditions outlined in *The BCG Application Guide*. Judges evaluate your research report thoroughly for adherence to standards for documenting, researching, and writing. You are judged via twelve rubrics which cover all five GPS components:

- Focus on responsiveness
- Extent and efficiency of research
- Adequacy of source citations
- Adequate starting-point information
- Comprehensive and accurate report
- Quality of evidence
- Correlation and assembly of evidence
- Resolution of conflicting evidence
- Soundness of conclusions
- Clarity of report
- Document images and separation safeguards
- Respect for privacy



Judging the case study

You submit a case study—a substantial proof argument—that demonstrates your ability to handle conflicting, indirect, or negative evidence. Judges evaluate your case study via eight rubrics, a subset of the twelve judged for the research report:



S501

David Ouimette, CG, CGL
Submitting a Successful Certification Portfolio

- Extent of research
- Adequacy of source citations
- Quality of evidence
- Correlation and assembly of evidence
- Resolution of conflicting evidence
- Soundness of conclusions
- Clarity of writing
- Respect for privacy



Judging the kinship-determination project

You submit a narrative genealogy, lineage, or pedigree including three generations of ascent or descent. This kinship-determination project includes all necessary genealogical proofs and biographical details specified in *The BCG Application Guide*. Judges evaluate this project per the same eight rubrics applied to the case study as well as two additional rubrics assessing biographical information and format:

- Extent of research
- Adequacy of source citations
- Quality of evidence
- Correlation and assembly of evidence
- Resolution of conflicting evidence
- Soundness of conclusions
- Clarity of writing
- Biographical information
- Format
- Respect for privacy



How do I know whether my portfolio is good enough?

Overall, your portfolio is judged “sufficient for certification” if your “work samples demonstrate most documenting, research, and writing standards, and any partially met or unmet standards are easily remediable.” To develop a stellar portfolio, study high-quality research reports, case studies, and family histories such as those showcased by BCG: <https://bcgcertification.org/learning/skills/genealogical-work-samples/>.

© David Ouimette 2024

#NGS2024GEN



S502

Nicole Elder Dyer
Organizing FAN Club Research with Airtable: Who was John West?

Organizing FAN Club Research with Airtable

Who was John West?

Nicole Elder Dyer

Nicole@FamilyLocket.com

Airtable is valuable for organizing complicated research. To identify John West, information about his friends, potential family, associates, and neighbors was gathered and analyzed.

FAN Club Research Methodology

FAN Club research, standing for Family, Associates, and Neighbors, is a genealogical research methodology that emphasizes the importance of exploring the social and familial network surrounding a research subject.¹ Instead of focusing solely on direct records of the research subject, which may be sparse, this approach encourages researchers to examine records and documents related to the individuals in the subject's community. By investigating the lives and interactions of these FANs, researchers can uncover valuable information and clues about the subject. This method operates on the principle of reciprocity: if the research subject is mentioned in records pertaining to their FANs, then it's likely that the FANs' records will similarly mention the research subject. This approach not only broadens the scope of research but also increases the likelihood of discovering previously overlooked connections and details.

Introduction to Airtable

Airtable is a versatile cloud-based database platform that serves as an invaluable tool for genealogical and FAN Club research. Its ability to function both as a spreadsheet and a database makes it uniquely suited for organizing complex research data. For researchers focusing on the friends, associates, and neighbors of a research subject, Airtable's linking functionality is particularly beneficial. Within an Airtable base, researchers can create a research log table to document each search and then link specific entries—such as names of friends, family, associates, and neighbors—to a dedicated FAN Club table. This relational database approach not only streamlines the organization of data but also ensures that researchers can easily trace the origin of each FAN Club member's information.

¹ Elizabeth Shown Mills, *QuickSheet: The Historical Biographer's Guide to Cluster Research (the FAN Principle)* (Baltimore: Genealogical Publishing Company, 2012).

© Nicole Elder Dyer, 2024



S502

Nicole Elder Dyer

Organizing FAN Club Research with Airtable: Who was John West?

Airtable Terminology

Base – a database with one or more tables

Table – list of similar items in rows/columns

Record – rows in a table

Field – columns in a table

Primary field – a row's first field

View - unique configurations of tables

Airtable Templates

Airtable Universe is a space for creators to share templates with the public. View my templates here: <https://airtable.com/universe/creator/usrsBSDhwHyLNnP4O/nicole-dyer>. After you create a free Airtable account, you can copy these templates to your account.

1. [FAN Club Genealogy Research Log Template 2.0](#) – This base includes a People table along with Research Log and FAN tables.
2. [RLP with DNA 4.0 \(2024\) Log](#) – This template was created for the Research Like a Pro with DNA study group. If your project will use DNA evidence at some point, consider starting with this base. The base includes tables for DNA matches, FANS, and more.
3. [RLP with DNA 2024 - Blank](#) – This template is the same as #2 but without example data.

To use the templates, click “use template.” This will save the template to your Airtable account. Within your Airtable account, click on the three dots next to the base title. Choose “duplicate base.” The next screen will ask if you want to duplicate records and comments. If you are using the FAN club base, you can turn off the “duplicate records” button. Comments are only relevant if you have been collaborating, so you can ignore that option. Turning off the “duplicate records” option will give you a blank template with no example data.

If you're using the RLP with DNA template, keep the “duplicate records” button toggled on, so the Shared cM data will remain in the base. Give your base a new name, like “George M. Smith's Parents.” If your using the RLP with DNA base that includes example data, you can simply delete the example data by checking the box at the top of each table to select all rows, right click or ctrl+click, and choose delete. Just don't delete the data from the Shared cM table.

FAN Table

The Fan Club 2.0 and RLP with DNA 4.0 templates include a seamless integration of the Research Log Table with the FAN Club Table. When creating an entry in the Research Log Table, researchers are prompted to input the names of individuals associated with the record into the designated FAN field. It's crucial to enter these names precisely as they appear on the original document, including exact spellings, middle names, initials, and suffixes (Jr., Sr., Esq.) to

© Nicole Elder Dyer, 2024

#NGS2024GEN



S502

Nicole Elder Dyer

Organizing FAN Club Research with Airtable: Who was John West?

maintain historical accuracy. When a FAN appears with the same exact spelling in two different records, the best practice is to create a separate row/record for each appearance.

Upon entering a name into the FAN field, Airtable automatically generates a corresponding record in the FAN Club Table. The name entered becomes the primary field. Primary fields in Airtable serve as a description of the record (row). To facilitate sorting and grouping, two formula fields for first name and surname are automatically populated by looking for the first word of the name and the last word of the name. If a suffix is used, manually separate that from the primary field into the suffix field so the formula doesn't use the suffix as the surname.

Within the FAN club table, there is a field called "role" that allows you to select from a list what type of association the research subject and the FAN have. This feature enables researchers to further classify each entry by assigning roles, such as witness, neighbor, minister, judge, in-law, or other relevant associations, providing clarity on the nature of each relationship. You can add whatever association type you want, even if it's not in the premade list.

A common challenge in genealogical research is distinguishing between individuals who may have name variations across different documents. For instance, encountering names like Alfred Keetch, Alfred G. Keetch, and A.G. Keetch in separate records may initially suggest the presence of multiple individuals. However, upon closer analysis, researchers may conclude that these variants represent a single person, Alfred Greenwood Keetch. In such cases, the FAN Club Table offers a solution through the "Identified Person" field, which links these disparate entries to a singular profile in the People Table—a comprehensive list of all individuals within the project. This approach allows researchers to maintain the original name spellings from documents, while logically consolidating these records under the correct individual's profile.

Helpful Airtable Features for Report Writing

In Airtable, using sorting, filtering, and grouping features can streamline your research process, making report writing more efficient. Filtering selects records based on specific criteria, sorting arranges them in a particular order, and grouping clusters similar records together. Once you've arranged the records to your preference, you can save this configuration as a view. For instance, if you're focusing on one individual from a family of six's timeline, you can create a view displaying only that person's records, either chronologically or by record type. Similarly, creating views in your FAN club table allows for targeted analysis of connections, such as sorting or grouping by surname to explore familial links and patterns.

© Nicole Elder Dyer, 2024



S502

Nicole Elder Dyer

Organizing FAN Club Research with Airtable: Who was John West?

By adding a checkbox to records within the timeline and research log, one can easily mark items that have been incorporated into the report, ensuring that no data is overlooked or duplicated. Tracking citations for sources in an Airtable research log also enables a comparative analysis of citations directly within the Airtable log to maintain consistency across references.

Case Study: John West

The John West project highlights the value of tracking FANs in Airtable when searching for connections to a family of origin. Utilizing FAN Club principles to examine the social and familial networks of John West and other men with the West surname, the study navigated challenges such as common names and lost records. Initial investigations suggested that some of the men with the surname West might share kinship with the research subject. However, careful analysis and subsequent DNA testing revealed that these individuals descended from a different West lineage, as evidenced by non-matching Y-DNA results. It became clear that John West's connections in Virginia and Tennessee were probably limited to his immediate descendants, rather than any ancestral or extended familial ties.

Further Reading

Dyer, Nicole. "Airtable Research Logs." Blog post. *Family Locket*. 14 May 2020.

<https://familylocket.com/airtable-research-logs/>.

----- "DNA Research Logs: How to Keep Track of Genetic Genealogy Searches." Blog post. *Family Locket*. 11 October 2019. <https://familylocket.com/dna-research-logs-how-to-keep-track-of-genetic-genealogy-searches/>.

----- "How to Use Airtable to create a Genealogy FAN Club Research Log." Video. 12 May 2020. *Family Locket YouTube Channel*.

<https://www.youtube.com/watch?v=LtHLmpiIdYE>.

----- "Tracking DNA Matches with Airtable - A Step-By-Step Tutorial." Video. 23 May 2023. *Family Locket YouTube Channel*. <https://www.youtube.com/watch?v=mBKAf7wXoJ4>

Elder, Diana. "Configuring Views in Airtable Research Logs." Video. 3 February 2024. *Family Locket YouTube Channel*. <https://www.youtube.com/watch?v=hPooTnhoeuY>.

Mills, Elizabeth Shown Mills. *QuickSheet: The Historical Biographer's Guide to Cluster Research (the FAN Principle)*. Baltimore: Genealogical Publishing Company, 2012.

© Nicole Elder Dyer, 2024



S503

Barbara Vines Little, CG, FNGS, FUGA, FVGS
Using Land Records to Prove Ancestral Connections

Using Land Records to Prove Ancestral Connections

Barbara Vines Little, CG, FNGS, FUGA, FVGS
PO Box 1273, Orange, VA 22960
540-832-3473
bvlittle@earthlink.net

Learn to use tract and other land ownership maps, land platting, and/or title searching to identify an earlier landowner and prove that ancestral connection.

Part 1. A. The Ingredients:

1. Land records: patents, deeds, surveys, partitions (check state guides for sources)
2. Road orders
3. Tax lists
4. Probate records, chancery and other land-title suits

B. Helpful aids:

1. Deed abstracts
2. Patent maps
4. Maps identifying residents and landowners

C. Nineteenth and twentieth-century sources

1. Federal land records especially the plat books
2. Insurance maps
3. City directories
4. GIS data

Part II. A. Case studies:

1. Forty miles by the road; two miles by the path to the church.
2. On the trail of the tax taker (establishing the route) and identifying the father-in-law.
3. Road orders identify present occupants rather than owners.
4. The case of the Scottish Ballards and the Quaker Ballards.
5. James Blackwell's father is still missing, but found his wife's grandfather.
6. Which John Woodson was the father?
7. From 1726 to the 1930s: Proving the father of Zachariah Herndon.



S503

Barbara Vines Little, CG, FNGS, FUGA, FVGS
Using Land Records to Prove Ancestral Connections

Bibliography

For those who wish to expand or brush up on their platting skills and/or understanding of early land surveying the following are recommended:

Hofmann, Julian G. and B. Ransom McBride. "Chapter 7: Mapping." In Helen F.M. Leary, ed. *North Carolina Research: Genealogy and Local History*. 2nd ed. Raleigh: North Carolina Genealogical Society, 1996.

Hughes, Sarah F. *Surveyors and Statesmen: Land Measuring in Colonial Virginia*. Richmond: Virginia Surveyors Foundation and Virginia Association of Surveyors, 1979.

A title examiner's manual for the state of interest.

Computer mapping programs are extremely helpful. I use and can recommend the following:

Deedmapper 4.2. Direct Line Software, 71 Neshobe Road, Newton, MA 02168; 617-527-9566. \$99.00. Creates single and multiple tract maps. <https://directlinesoftware.com/>.

Maps

Landownership maps are useful. However, the researcher will rarely find one for the time period and area in which he/she is interested. However, any land ownership map of an area can be used as a base from which to work forward or backward. Discovering these maps can be a challenge in itself. Possible sources include

City maps can often be found in nineteenth-century atlases. Large research libraries and manuscript repositories are some of the best sources.

Papers of the Bureau of Public Works or its equivalent in any state often contain maps showing proposed canals, roads, turnpikes, and other public projects. Residences and land owners are often identified.

Insurance maps: the best known and most reproduced are the Sanborn fire insurance maps which are usually available at large research institutions.

Post office and census route maps are sometimes available.

Many states have compiled catalogs of maps and surveys such as the

Catalogue of Maps and Surveys in the Offices of the Secretary of State of the State Engineer and Surveyor and in the New York State Library. Albany, N.Y.: Weed, Parsons and Company, 1851.

Claussen, Martin P. and Herman R. Friis. *Descriptive Catalog of Maps Published by Congress 1817–1843*. Washington, D.C., 1941.

Miles, William. *Michigan Atlases and Plat Books: A Checklist 1872–1973*. Lansing, Mich.: Dept. of Ed., 1975. Lists numerous farm and plat books.



S503

Barbara Vines Little, CG, FNGS, FUGA, FVGS
Using Land Records to Prove Ancestral Connections

WPA inventories often included special inventories of maps.

Guides to manuscript collections or special map collections are helpful; examples include

Brun, Christian, *Guide to the Manuscript Maps in the William L. Clements Library*. Ann Arbor: U. of Michigan, 1959.

Sames, James Walter. *Index of Kentucky and Virginia Maps, 1562 to 1900*. Frankfort: Ky. Historical Society, 1976.

Dealer catalogs often list originals and reproductions of maps and views. Artists' renditions (especially nineteenth-century) of towns, villages, and city streets can often be substituted for maps as can early photographs found in photograph collections or local histories. For example,

Souvenir Series Catalog 1995–6, Historic Urban Plans, Box 276, Ithaca, NY 14851.

Two guides that provide information on map collections in libraries throughout the U.S. are

Carrington, David K. and Richard W. Stephenson, eds. *Map Collections in the United States and Canada, A Directory*. 4th ed. New York: Special Libraries Assoc., 1985. Indicates date ranges and types of specialization for major map repositories.

Cobb, David A. *Guide to U.S. Map Resources*. Chicago: American Library Association, 1986. Lists special strengths and special collections.

There are numerous guides to the map collections at the Library of Congress and the National Archives.

Don't forget early USGS maps and the local government, which often has early agricultural survey (USDA) and tax maps.

On-Line Resources

The Library of Congress. <https://www.loc.gov/maps/collections/>

Is digitizing images from its collection of over 4.5 million items. Military, panoramic maps, cities and towns, and railroad maps (1828–1900) form only a small section of the maps currently available as digital images. These can provide a surprising amount of local land ownership information.

David Rumsey Map Collection. <https://www.davidrumsey.com>

Has over 11,000 maps online. The collection focuses on rare 18th and 19th century North and South American maps and other cartographic materials.

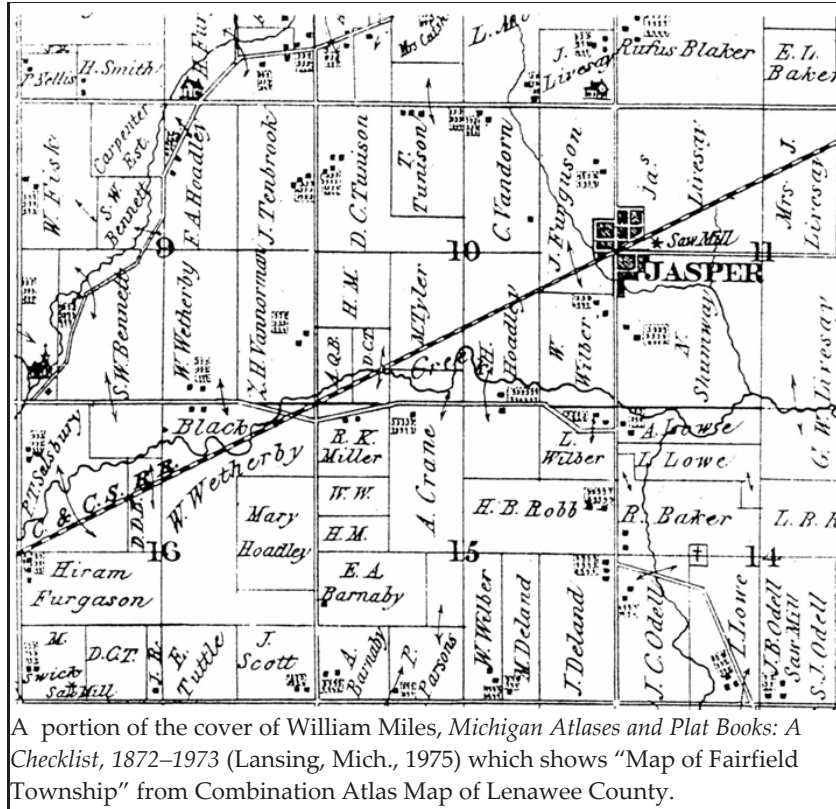
The University of Texas at Austin has a number of georeferenced scanned maps from the Perry-Castañeda Library Map Collection.

Scanned images can be found in collections large and small—search and you will find.

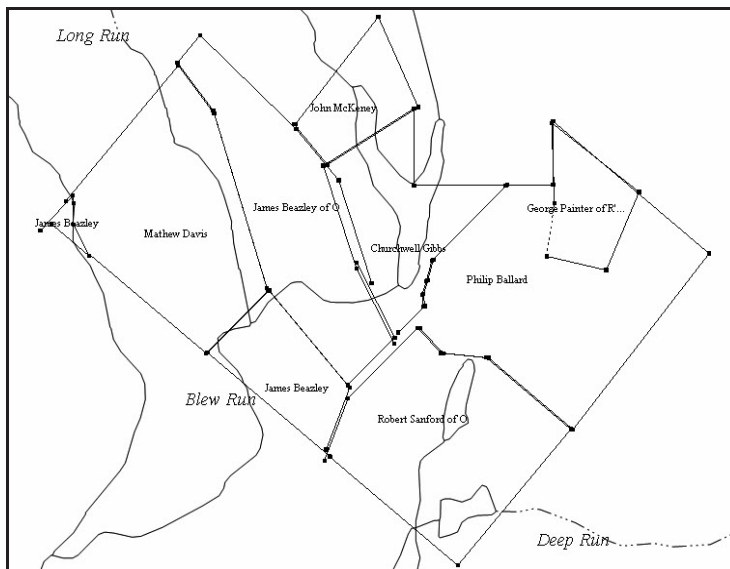


S503

Barbara Vines Little, CG, FNGS, FUGA, FVGS
Using Land Records to Prove Ancestral Connections



#NGS2024GEN





S504

Cheri Hudson Passey

Discovering Buried Treasure: Miscellaneous Papers and Mixed Provenance Records

Discovering Buried Treasure: Miscellaneous Papers and Mixed Provenance Records

Cheri Hudson Passey

National Genealogical Society 2024 Virtual Family History Conference

Libraries and Archives often receive documents and other items that are difficult to catalogue. They end up being placed in files or boxes labeled Miscellaneous or Mixed Provenance so are often overlooked. These records can hold hidden treasures that answer genealogy questions!

- What are Miscellaneous Papers and Mixed Provenance Files?

Miscellaneous Papers are those that can be of any type within one container.

Mixed Provenance Files are documents that came from different sources within one container.

These are files and boxes of archival materials that have not been cataloged by the repository. Their contents may be unknown.

- 2-Where to Find Them
 - online catalogue
 - in person at a repository
 - don't overlook hanging files

When visiting an archives, library or other repository always look in the finding aide or ask for uncatalogued materials. Patience and kindness with archivists and librarians goes a long way in helping you get permission to look at some of these records.

- What can you find?
 - documents
 - letters
 - bank notices
 - receipts
 - you never know what treasures you may unearth!



S504

Cheri Hudson Passey

Discovering Buried Treasure: Miscellaneous Papers and Mixed Provenance Records

- Best practices for digging in:
 - if possible, keep documents in same order
 - gather historical and social context of contents
 - look for clues about family members
 - look for clues about FAN club members
 - journal and log the story the box is telling you
 - photograph or scan any items important to your research question
- 5--Case study.
 - Finding Sarah and John in the Big Box
 - letters
 - signatures
 - pension payments
 - A genealogy question answered.

Finding Archives and Libraries and Other Repositories

Cyndi's List-

<https://www.cyndislist.com>

Search for specific locations for archives and libraries in your area of interest.

FamilySearch Research Wiki-

https://www.familysearch.org/en/wiki/Main_Page

Search for specific locations for archives and libraries in your area of interest.

ArchiveGrid

<https://researchworks.oclc.org/archivegrid/>

Search for Miscellaneous Papers and Mixed Provenance record collections.

You may find some that may deal with your family in unsuspected places in the US.

#NGS2024GEN

Foundations in Family History



An Online Course from the National Genealogical Society

Foundations in Family History is a new online course from the National Genealogical Society. It takes genealogists step-by-step through the fundamental concepts of researching family history. This course was developed to give each family historian a solid foundation in the research skills needed to find and evaluate records for their family and to build their family tree—generation by generation.

The Foundations course is presented in three parts online using Canvas software which allows students to explore course content, watch videos, take quizzes, and learn at their own pace from home. The course work is designed to be progressive with each of the eighteen learning modules building on each

ngsgenealogy.org
Special rates for NGS Members

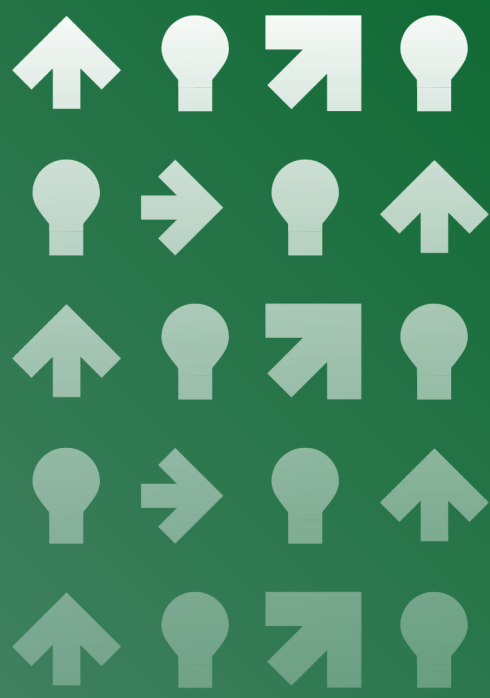
other to optimally develop skills. Topics include working with vital, probate, religious, and other records; creating a research plan; understanding DNA basics, and much more.

Whether you are just getting started or are an intermediate genealogist, NGS's Foundations course will help to fill gaps in your skills and research experience, make solid family connections, and solve brick walls. The course gives family historians the tools necessary to be successful. To learn more about the Foundations in Family History course, please visit the NGS website.



NATIONAL
GENEALOGICAL
SOCIETY

NGS Education. Build Your Skills. Build Your Family History.



DIRECTORY OF EXHIBITORS

BRING YOUR VIRGINIA FAMILY HISTORY TO LIFE WITH VGS

Join Us Today

Member Benefits include:

The Magazine of Virginia Genealogy

The VGS Newsletter

Members-Only Website Content



Reduced Rates for VGS Conferences

Discounts on VGS Publications

Affiliate Discounts

Access to Prior Webinars

PROMOTING FAMILY HISTORY AND RESEARCH SINCE 1960



www.vgs.org



facebook.com/VGSgenealogy



Ancestry

Platinum Sponsor

jutley@ancestry.com

<https://www.ancestry.com/>

Ancestry®, the global leader in family history and consumer genomics, empowers journeys of personal discovery to enrich lives. With our unparalleled collection of 20 billion records and over 16 million people in our growing DNA network, customers can discover their family story and gain actionable insights about their health and wellness. For over 30 years, we've built trusted relationships with millions of people who have chosen us as the platform for discovering, preserving and sharing the most important information about themselves and their families.

Afro-American Historical and Genealogical Society

president@aahgs.org

<https://www.aahgs.org/>

AAHGS was founded in 1977 in Washington, DC by a small group of historians and genealogists, who felt a need to share resources and methodology for pursuing historical and genealogical research. For more than 47 years, our members have worked together to trace the historical ties that bind us one to another, mold the present, and shape the future. We operate as a national organization with local affiliate chapters. Members of AAHGS are a diverse group of people of various ages, ethnicities, and professions - all united in their desire to preserve our past and enable our future.

American Ancestors

don.reagan@nehgs.org

<https://www.americanancestors.org/>

Founded in 1845, American Ancestors is the country's leading resource for family history research. We help genealogists of all skill levels improve their knowledge and understanding of their family and its place in history. We provide our award-winning website, AmericanAncestors.org, as the online repository for more than 1.4 billion searchable names from America and beyond.

Ancestor Tracks

sharoncookmac@gmail.com

<https://ancestortracks.com>

Ancestor Tracks is a one-stop portal for researchers of Pennsylvania landowners from earliest settlers to late 1800s. As a service, we have posted countless free, downloadable images of 18th-century landowner maps covering the state. We also have two product lines: (1) state-wide Warrant, Patent, and Tract Name Ledgers that detail the first people to whom Pennsylvania's colonial or state government transferred land (pdf downloads, 1683-ca 1950); and (2) atlases for 7 counties showing metes-and-bounds tracts within today's townships and their original owners (warrantees and patentees). These atlases show dates of warrant, survey, patent, tract size, online survey reference, and neighbors.

Archival Methods

angelac@archivalmethods.com

<https://www.archivalmethods.com/>

Archival Methods is a manufacturer and supplier of archival storage and presentation products based in Rochester, NY. We handcraft our binders, boxes, portfolios and sell various archival quality enclosures such as sleeves, bags, envelopes and folders.



Association of Professional Genealogists

Bronze Sponsor

admin@apgen.org

<https://www.apgen.org/cpages/home>

The Association of Professional Genealogists (APG) is a not-for-profit 501(c)(6) professional organization dedicated to the growth and enhancement of the genealogical profession. Our mission is to support those engaged in the business of genealogy through advocacy, collaboration, education, and the promotion of high ethical standards. We also seek to protect the interests of clients engaging the services of a professional genealogist and the public perception of the field of genealogy.



#NGS2024GEN

Board for Certification of Genealogists

Silver Sponsor

office@BCGcertification.org

<https://www.bcgcertification.org/>

The mission of the Board of Certification of Genealogists® is "...to foster public confidence in genealogy as a respected branch of history by promoting an attainable, uniform standard of competence and ethics among genealogical practitioners, and by publicly recognizing persons who meet that standard..." BCG is an independent, non-profit certifying body which promotes ethics and standards through its certification program and publications. Certification results from an evaluation of work samples in a portfolio submission. Applicants are evaluated on standards for documenting, researching, and writing. Certification says a practitioner has met rigorous standards for knowledge and competence in the field.

BYU Center for Family History and Genealogy

jill_crandell@byu.edu

<https://cfhg.byu.edu>

The BYU Center for Family History and Genealogy provides research tools to the public at no cost, while providing mentored learning experiences for the family history majors at Brigham Young University. Visit our booth to learn more about the Immigrant Ancestors Project, Early British Census Project, Script Tutorials, Linking Families for Cancer Prevention, Nauvoo Community Project, and more.

Civil War Records

brian@civilwarrecords.com

<https://civilwarrecords.com/>

We provide on-site research and record retrieval services at the National Archives, specializing in Civil War and War of 1812 soldiers. We go to DC so you don't have to! Our services are quicker and cheaper than ordering directly from the National Archives. If you have an ancestor who was in the military in the 1800s, there's a good chance that they have records at the National Archives that we can help you get.

Clayton Library Friends

publicity@claytonlibraryfriends.org

<https://www.claytonlibraryfriends.org/>

Clayton Library Friends, Inc. is a 501(c)(3) Non-profit organization that seeks to enrich the resources and facilities of The Family History Research Center at the Clayton Library Campus, a unit of the Houston Public Library. In the pursuit of that mission, the officers and directors of the organization, in coordination with the manager of the Clayton Library, organize and direct fundraising projects to support the acquisition of research material for the library, to upgrade library facilities, and to enhance library services.



Digging History

seh@digging-history.com

<https://digging-history.com/>

Digging History provides historical and genealogical research services for its clients, as well as custom-designed family history charts. We also publish Digging History Magazine, a bi-monthly digital publication which focuses on history and genealogy. Our philosophy: in order to be adept at one discipline (genealogy) one must be well-versed in the other (history).

Family Locket Genealogists

nicole@familylocket.com

<https://familylocket.com>

Learn to research like a pro with Family Locket Genealogists using their highly-praised books, online courses, and study groups. Diana Elder, AG and Nicole Dyer, mother-daughter team, discuss records, organization, methodology, and DNA in their free, weekly Research Like a Pro Podcast. Their weekly newsletter includes links to new blog posts and updates on their own research. Discover a process to organize and use DNA evidence with their book and course, Research Like a Pro with DNA. Along with their educational materials, Family Locket offers coaching, consultations, and professional research.

Family Search

Gold Sponsor

provardmr@familysearch.org

<https://www.familysearch.org/en/>

FamilySearch International is the largest genealogy organization in the world. Millions of people use FamilySearch records, resources, and services to learn more about their family history. FamilySearch has been actively gathering, preserving, and sharing genealogical records worldwide for over 125 years. FamilySearch services and resources are free online at FamilySearch.org or through more than 5,000 family history centers in 132 countries, including the Family History Library in Salt Lake City.

Family Tree Magazine (Yankee Publishing Inc.)

familytree@yankeepub.com

<https://familytreemagazine.com/>

With 20-plus years of genealogy experience, the leading experts at Family Tree will help you find your ancestors. We share how-to guides in our magazine (published six times per year, in both print and digital formats), website, free monthly podcast, online courses, and webinars. Topics include organizing research, understanding records and DNA results, studying your ethnic heritage, preserving family photos and heirlooms, and tapping into the best genealogy websites and resources.

Family Tree Maker

Gold Sponsor

kirtak@mackiev.com

<http://familytreemaker.com/exhibition/ngs2024/>

It's been 35 years since Family Tree Maker was born, and our new edition takes this grand old brand to new places its original creators could only have dreamed of. Where your relatives fact-check your tree on their phones half way across the world. Where the interface grows in just the right places to go easy on your eyes. Where your Mom's wedding album becomes a narrated interactive documentary. Where a built-in resource center has what you need most, from professional genealogists to helpful books and rare archives. All this and more in the new world of Family Tree Maker.

Family Tree Notebooks

carly@familytreenotebooks.com

<https://familytreenotebooks.com/>

Family Tree Notebooks is a simple system of pages you can use to build family history books for your relatives, your clients, your societies, and so on. Using the pages gives you a way to take all of the research you've done and turn it into something that's easy to read, even if you aren't a genealogist. The best part? All the pages are digital so you can use them again and again to create beautiful books that are simple to print or share electronically.



FamilyTreeDNA

Silver Sponsor

janinec@genebygene.com

<https://www.familytreedna.com/>

Discover your unique DNA story with FamilyTreeDNA's industry-leading autosomal DNA (Family Finder), mitochondrial DNA (mtDNA), and Y-DNA testing services. The pioneer of the genetic genealogy industry, FamilyTreeDNA has helped over two million people break down genealogical brick walls for the last 22 years. With three databases—Family Finder, mtDNA, and Y-DNA—composed of over two million testers, FamilyTreeDNA allows you to make new connections with sophisticated tools and features that open up opportunities to discover more about your genetic ancestry—all with a simple swab of your DNA. FamilyTreeDNA is the place to test for those looking to gain further insight into their family history.

Genealogical Society of Pennsylvania

admin@genpa.org

<https://genpa.org>

The Genealogical Society of Pennsylvania (GSP) is a non-profit educational institution located at 2100 Byberry Road, Suite 111, Philadelphia, Pennsylvania 19116. Founded in 1892, GSP is one of the earliest genealogical societies founded in the United States. Our mission is to provide leadership and support in promoting genealogy through education, preservation, and access to Pennsylvania-related genealogical information. GSP is committed to preserving and publishing primary source records and to helping people to search for their ancestors.

Genealogical.com

jgaronzi@genealogical.com

<https://genealogical.com/>

Genealogical.com is the leading—and oldest—publisher of genealogy books in the country. Under the Genealogical Publishing Company (GPC) and Clearfield Company imprints, Genealogical.com features a catalog of more than 2,000 publications, many of which—such as Val D. Greenwood's *Researcher's Guide to American Genealogy* and Elizabeth Shown Mills' *Evidence Explained*—have set the standard for their fields.

Genealogy TV Academy

Connie@GenealogyTV.org

<https://genealogytv.org/>

Genealogy TV is the largest independent YouTube channel in the genealogy space, but it is much more than just a YouTube channel, there is also the Genealogy TV Academy (GTVA). Membership in the Genealogy TV Academy allows access to live Zoom classes with Connie Knox. Twice a month GTVA students get live class presentations and live Q&A sessions (one each). Learn from professional genealogists and to be able to ask questions. Membership in the GTVA also provides access to all Academy recorded sessions, YouTube recordings (commercials free on the GTVA platform) and access to the Genealogy TV Insiders Facebook Group.

Geni

Silver Sponsor

amanda@geni.com

<https://www.geni.com/>

Geni, a MyHeritage company, is a leader in collaborative genealogy and the home of the World Family Tree, which connects more than 185 million relatives. Through the collaboration of millions of global users and with the aid of over 200 volunteer curators, Geni's World Family Tree is quickly becoming one of the largest and highest quality family trees of the entire world. Sign up for FREE and discover your connection today. <https://www.geni.com>

Indiana State Library

jadunn@library.in.gov

<https://www.in.gov/library/>

Throughout its history, the Indiana State Library has developed strong collections in the fields of Indiana history and culture, Indiana state government and United States government publications, Indiana newspapers, genealogy and family history resources on Indiana and the eastern United States, Braille, large print, and books on tape for the visually impaired, library science, and American history, politics, and economics. Its collections in these areas support research by state agency employees, scholars, genealogists, librarians, students, Indiana residents who are blind or have physical disabilities, and the general public.



International Commission for the Accreditation of Professional Genealogists

jenny.hansen@icapgen.org

<https://www.icapgen.org/>

The International Commission for the Accreditation of Professional Genealogists, internationally recognized as ICAPGen, is a professional credentialing organization dedicated to testing an individual's competence in genealogical research. We set standards for the genealogical community through comprehensive written and oral examinations. Our organization is administered by a board of qualified Commissioners with many years of experience.

Irish Genealogical Society International

president@irishgenealogical.org

<https://www.irishgenealogical.org/>

The Irish Genealogical Society International (IGSI) began in 1979 as a local group with shared interests in Irish ancestry. Over 45 years it has grown to an independent Society with international reach, still devoted to the same subject. Our quarterly journal, The Septs, has been published continuously since 1990. Our Irish collection (over 3,500 titles) is housed at the Minnesota Genealogy Center near the MSP airport. Volunteers provide patron services there and remotely. Our monthly seminars on research and cultural heritage, both live and virtual, since 2020 have hosted more than 2500 attendees. Our website is a rich resource for researchers.

Kentucky Genealogical Society

kathykeyser@kygs.org

<https://kygs.org/>

We are the virtual statewide genealogical society for the Commonwealth of Kentucky, working together to achieve our mission to: Bring together genealogists and family historians to promote fellowship and networking. •Promote educational programs and projects that preserve, produce, and disseminate knowledge of historical value for Kentucky researchers. Encourage the preservation and availability of Kentucky records that are essential to genealogical and historical research. Enhance your genealogical pursuits by connecting with our community

and embark on a journey of growth and discovery. Join us as we delve into the narratives and connections that lie within Kentucky's past. Membership per year - individual \$20; institution \$15/year. Visit our website today (www.kygs.org) for upcoming events, the Bluegrass Roots blog, and our Learning Library.

Library of Virginia

ashley.ramey@lva.virginia.gov

<https://www.lva.virginia.gov/>

Welcome to the Library of Virginia. With more than 130 million items in its collections, the Library is the primary global resource for exploring Virginia's history, culture and government. We're proud to be a highly regarded source among the national and international research communities and among everyday citizens seeking their stories within our rich archives.

My China Roots

clotildeyap@mychinaroots.com

<https://www.mychinaroots.com/>

My China Roots is the leading genealogy platform for individuals of Chinese heritage to explore their Chinese ancestry. Available to both individuals and institutions, a subscription to the My China Roots database provides access to a variety of Chinese historical records, including Chinese family tree books, immigration and Chinese exclusion records, tombstones, directories and more. My China Roots also provides professional genealogy research services to Chinese American families, including field research in China, translation services and roots trips.



MyHeritage

Silver Sponsor

conferences@myheritage.com

<https://www.myheritage.com/>

MyHeritage offers users a meaningful discovery experience that unites their past, present, and future using sophisticated matching technologies, billions of international historical records, and at-home DNA tests. It is also home to the world's best technologies for animating, colorizing, and enhancing historical photos. MyHeritage's Deep Nostalgia™ feature has taken the internet by storm and has been used over 80 million times. Another recent addition, Genetic Groups, dramatically increases the resolution of MyHeritage's ethnicity breakdown to 2,114 geographic regions, and enables users to pinpoint the specific locations their ancestors came from, providing greater depth than any other consumer DNA test.

National Society Daughters of the American Revolution

asombke@dar.org

<https://www.dar.org/>

The National Society Daughters of the American Revolution is the largest women's service organization in the world. Over 180,000 women are members of over 2500 chapters in the US and in other countries. Membership is open to any woman over age 18, who can prove lineal descent from someone who aided the cause of American Independence. The cornerstones of our mission are: education, patriotism, and historic preservation. Each chapter participates in its own set of service projects and social events. However, women in every chapter support each other and often become lifelong friends.

New York Genealogical and Biographical Society

mmcevoy@nygbs.org

<https://www.newyorkfamilyhistory.org/>

Founded in 1869, the New York Genealogical & Biographical Society (NYG&B) is a nonprofit organization that preserves, documents, and shares family history and stories from across New York State. As the second-oldest U.S. genealogical society, the NYG&B serves members

both nationally and internationally through its extensive records and resources; educational programming; and landmark publications, including its scholarly journal The NYG&B Record, quarterly issues of the New York Researcher, and the award-winning New York Family History Research Guide and Gazetteer. Its comprehensive records and collections encompass genealogical and historical materials from all 62 counties in New York State. Learn more at www.newyorkfamilyhistory.org.

Palatines to America

neker0@aol.com

<https://palam.org/>

PalAm is a national society dedicated to researching German-speaking ancestry from any area and time period. This includes any region of Germany and other countries that were at one time a part of Germany. Membership provides access to databases in a members' only section on our website at <https://palam.org/>. Members also receive a quarterly e-newsletter and a quarterly printed journal. Our society also has 6 state chapters (CO, IN, NY, NC, OH, and PA) which generally have their own spring and fall meetings and also publish chapter newsletters. The national society has a conference in even-numbered years.

Permanent Legacy Foundation

Silver Sponsor

amanda@permanent.org

<https://www.permanent.org/>

Permanent is the only mission-driven nonprofit dedicated to providing affordable, digital archiving and long-term digital preservation solutions for the general public. We offer a cloud storage platform and an ever growing toolbox of archive features, allowing you to build low-cost, high-value archives and secure your digital legacy for generations to come.



Related Faces Technologies LLC

tina@relatedfaces.com

<https://relatedfaces.com>

Discover your family history in photos with Related Faces! Our patented technology unravels the mysteries in your family photos by helping you identify unknown faces. You can build profiles for all of the faces in your photos whether they are known or unknown to you, organize your people and photos, and collaborate with others and so much more. Visit our website at relatedfaces.com. We're thrilled to help you Expand Your Possibilities by opening up your photos as new tools in your genealogical search!

St. Clair County Genealogical Society (SCCGS)

sccgsoffice@stclair-ilgs.org

<https://stclair-ilgs.org>

SCCGS is a not-for-profit, 501(c)(3), all-volunteer group of genealogists founded in 1977 and incorporated in 1978. Our members abstract, transcribe, translate, and index St. Clair County records of genealogical importance. These resources are preserved in our award-winning Quarterly, and in books, for purchase or perusal at the Belleville Public Library Archives. Timely topics reach Members in the eNews and Facebook page. We showcase SCCGS at national or regional conferences and host an all-day conference of our own on occasion. Together, these are ways SCCGS fulfills its educational purpose. Our members reside across the United States and a few countries abroad.

The Family History Guide Association

coo@thefhguide.com

<https://www.thefhguide.com>

The Family History Guide is a free website that represents a best-in-class learning environment for family history. Its scope is broad, but its focus is narrow enough to help you achieve your goals, step by step. Whether you're brand new to family history or a seasoned researcher—or somewhere in between—The Family History Guide can be your difference maker.

The Mayflower Society

executivedirector@themayflowersociety.org

<https://themayflowersociety.org/>

The General Society of Mayflower Descendants is committed to research on the lineal descent of the Mayflower Pilgrims and education about the Pilgrims who traveled aboard the Mayflower in 1620. The Society provides education and understanding of why the Mayflower Pilgrims were important, how they shaped western civilization, and what their 1620 voyage means today and its impact on the world.

Virginia Genealogical Society

admin@vgs.org

<https://www.vgs.org>

The Virginia Genealogical Society, established in 1960, boasts a nationwide membership dedicated to four primary goals: to promote and foster family history education and research; publish genealogical information; provide educational opportunities; and share accumulated knowledge. The Society encourages public awareness of family history and fosters research and understanding of genealogy through its publications and activities. Because many important research centers are already active in Richmond and throughout Virginia, the Society does not maintain its own research library. It does, however, provide a list of genealogists who research in local facilities.

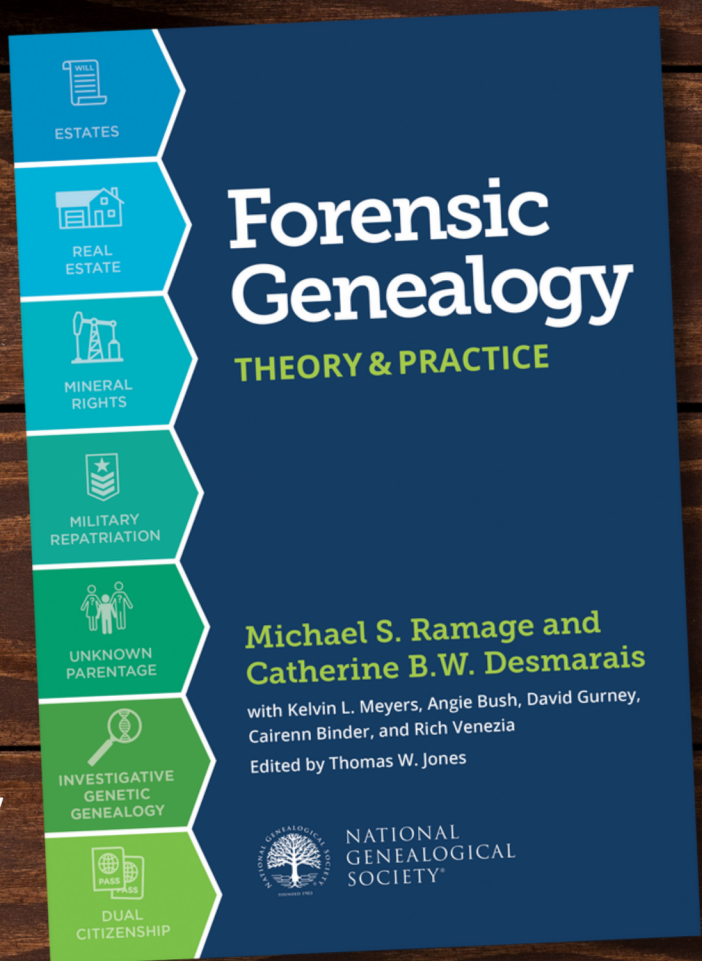
Vivid-Pix

Silver Sponsor

Rick.Voight@Vivid-Pix.com

<https://Vivid-Pix.com>

Vivid-Pix invents and harnesses technologies, making it simple for individuals, families, and organizations to relive memories and share stories. Whether by inventing software to restore decades / centuries-old photos / documents, bringing back precious memories that were thought to be long gone due to the passage of time, or cognitive decline, or helping to bring families and friends together at reunions, for over a decade Vivid-Pix has made it simple and affordable to relive memories and share stories.



**"An essential reference."
Thomas W. Jones, Editor**

Genealogy is More than Finding Ancestors

Learn more in this comprehensive, practical guide to the new era of forensic genealogy

Pre-order at ngsgenealogy.org

Starting 17 May 2024

Shipping this Summer



NATIONAL GENEALOGICAL SOCIETY®



Discover your Family Story

Millions of records available for free

FamilySearch provides the following free services to help people discover more about who they are by learning about their ancestors—all at no cost:

- Access to billions of historical records online (over 1 million more added daily)
- The ability to preserve and share personal and family memories—photos, stories, and historical family documents
- A collaborative online family tree to build, preserve and share common ancestries
- Personal research help through in more than 5,000 Family History Centers and our main Family History Library

Visit [FamilySearch.org](https://www.familysearch.org) today!