

Context: How to Find It & Use it

Jill Morelli, CG

jkmorelli@gmail.com

<http://theCDGseries.wordpress.com>

<https://appliedgen.institute>

Searches for broad context that focus on time and place allow us to interpret the evidence more accurately and understand more clearly the day-to-day decisions of our ancestors.

A “literature search” is an academic term used for the initial (and on-going) investigation in the previously published resources on a particular topic. The search identifies derivative and original materials on the chosen topic prior to beginning the ancestral research. At this point the candidate do not have a refined research question, although they may have a scope or intent.

Genealogists also need to conduct searches that are not person-focused, but rather spotlight time and place for a variety of topics related to their research question.

“Broad context” is defined in *Genealogy Standards* by examples:

“When planning research genealogists consider historical boundaries and their changes, migration patterns and routes, and sources available for potentially relevant times and places. They also consider economic, ethnic, genetic, governmental, historical, legal, linguistic, military, paleographic, religious, social and other factors that could affect the research plan and scope.”¹

Notice the range of topics and the implied timing of the search. The need to understand the culture and mores before conducting person-focused searches is imperative. The knowledge gained will shine a light on the actions of your ancestors, make your interpretation of the records more accurate and your future searches more efficient. In this session we expand the purpose of a broad context search from that which “affect[s] the research plan and scope” to include the increased ability to interpret our ancestor’s actions and records with greater clarity.

From a genealogical perspective the definition of a literature search, and also broad context, is composed of six characteristics:

- A systematic search
- Of original & published sources
- On a specific topic, which
- Assists in formulating a research question,
- Identifies gaps, and
- Identifies other resources.²

The word “systemic” implies there is a plan for searching a broad range of resources. The search is topic focused and not person focused. Since reading of related literature can help you craft or refine your genealogical research question, you should start with an “idea” of what you are seeking, but let the

¹ Board for Certification of Genealogists, *Genealogy Standards, Second Edition* (Nashville: Ancestry.com, 2019) 12. Permission to use.

² Modified from The Open Library, “How Do I Do a Literature Search,” no date, no author. <https://www.open.ac.uk/library/help-and-support/how-do-i-do-a-literature-search>

findings lead you. A broad context search can identify anomalies which need further research, particularly if your ancestor is not acting consistent with cultural norms—which you would only know after conducting broad context research. Other resources will often be located in the footnotes and/or a bibliography.

The deeper our understanding of the context, more information can be “wrung” from the documents.³ This deeper understanding helps us avoid “presentism,” where we apply our values of today to those of our ancestors. We will be less prone to “romanticize” situations of the past. For example, our concepts of love and marriage today are very different than the arranged or convenient marriages of the 1700s and 1800s. Deeper knowledge also helps us avoid “confirmation bias”, or at least forces us to recognize the bias we bring to our decision-making.

Your process of a literature search might look like this:

1. Identify your general topics/scope of inquiry
2. Identify specific topics and create a context research plan
3. Search broadly
4. Review the findings
5. “Shoebox” the pertinent resources
6. Read the resources in depth
7. Take notes and arrange the contents by topics⁴

Initially you will have a scope of inquiry without much substance. Step number 2 asks us to identify topics, and develop a Context Plan. This plan would include topics that are worthy of investigation to create clarity in our investigation of our ancestor. It is similar to a genealogical research plan focused on a person.

Use the examples in the definition of “broad context” in the *Genealogy Standards* as memory joggers.

An example:

“...Mrs. Ashley was born on New Year's Day in the little settlement of Coteau Dulac, near Montreal, daughter of Richard and Philura White Oakes, both full-blooded Scotch. When Mrs. Ashley was about 12 years of age, the family moved to Bangor [NY], and ...”⁵

From this small extract from an obituary, a Context Research Plan could be developed. It might look like the following with geographic, ethnic, migratory pattern, cultural and legal topics noted below:

1. Geography: Where is Coteau Delac, Quebec and St. Lawrence County, NY?
2. Ethnic: Were Scots in Quebec typical or atypical? What were their migratory patterns?
3. Historical: What was life like in Montreal in the 19th century?
4. Social/Ethnic: What were the naming practices in French Canada?
5. Migration: Was migration to NY from Quebec a typical migratory behavior or unusual?
6. Geography: What is the record availability in Quebec and NY?
7. Law: What is the impact of civil law in Quebec on records?

Although there is overlap, social history is person focused and occurs usually after the ancestral research is well underway. Social history is made evident in the writing. In contrast, context is often “silent” in our

³ Elizabeth Shown Mills, “Context: A Powerful Tool for Problem Solving,” National Genealogical Society Conference 2019, session F301. Obtain from <http://playbackngs.com>, 2019 St. Charles. Used with permission.

⁴ David Byrne, "What Makes a Successful Literature Review?." *Project Planner*, 2017. 10.4135/9781526408518. SAGE Research Methods Online, found at my academic library. Steps modified for genealogical purposes.

⁵ “Towns [*sic*] Oldest Resident Dies,” obituary, *Massena (NY) Observer*, 3 May 1928, p. 1, col. 6.

writing because it clarifies our understanding or interpretations rather than being additive to the story. Searches involving broad context pursue topics before pursuing the person.

Broad context searches are different than social history in focus, timing, and intent.

Armed with a place and an era, resources used for genealogical context searches might include FamilySearch Wiki, JSTOR, local libraries, ArchiveGrid (OCLC), ABC-Clio, Google Books/Scholar, webinars, academic library collections, personal artifacts, etc. Read or scan the article or book and decide whether this particular resource meets your needs. Place that resource in your “shoebox” of choice. It is recommended that you record ALL your resources consulted, even the rejected ones, with a brief note as to the contents and why it was rejected. This builds a “library,” which might become important further into the investigation.

Record your findings in a manner suitable for your use and retrieval. You might consider Evernote, Scrivener, Airtable, Excel or Word, all while you “Write As You Research!” Tag your findings by topic.

It is important not to just collect articles and manuscripts, but to read, study and summarize or transcribe/abstract them for later use. These notes are filed in your context findings “shoebox,” source by source—fully cited. Clearly identify those entries which are quotes and which are summaries. You might find it helpful to read three or four paragraphs and summarize that information. Be sure to note the page where the finding was originally located.

A “Write As You Research” approach should be used to record your context findings.

DIY CONTEXT RESEARCH

As we conduct our literature search, questions arise that cannot be answered by reading the work of others. The question may be too specific to rise to the level that someone would conduct independent work. Sometimes that question can only be answered by your own original investigation. When the answer to that question would provide the needed context, conduct your own research. Do it yourself!

Some examples might be:

1. Using census data in a longitudinal study, identify the foreign born in German Township, Hancock County, Iowa, and compare changes over time (a longitudinal study).
2. At a single point in time and using the agricultural non-population schedules, determine the relative wealth of farmers in a particular county. (cross-sectional study)
3. Using Social Statistics, another non-population schedule of the 1800s, identify changes in a community over time.

Some topics that I have recently conducted literature searches for broad context and those that developed into DIY context studies include:

- The History of Dissention in Sweden and Hishult parish, Sweden.
- Migration patterns from three Swedish parishes between 1850 and 1900
- The Orphan Train Movement between 1854 and 1929
- Identification and biographical sketches of the 1890 Orphan Train Riders of Hamilton County, Iowa
- History of Banking in the US starting in 1834 to the failure of my grandfather’s bank in Iowa.

RESOURCES: FOR RESEARCH

URLs reviewed in November 2025

- ArchiveGrid: <https://researchworks.oclc.org/archivegrid/>; free, catalogs manuscripts found nowhere else from archives, public and private in the US (mostly). No digital copies of documents, but now you know from whom to request your inter-library loans.
- “Do History,” Film Study Center, Harvard University. (<https://dohistory.org>). This is a well-constructed site. Check out how they approached *The Midwife’s Tale*.
- Encyclopedias. There are a large number of specialty encyclopedias that can give you a good overview of a particular topic. These are mostly available from academic libraries, so check their catalog first. Additional resources will be located at the end of the article.
- Daily Life Through History: looks at daily life in many time periods to present day. Has subsections on children, sports & games, food & drink, etc. A sub-set of ABC-Clio.
- SAGE Reference Online: a collection of articles related to the social sciences. Example Women of the West > Women in the Cripple Creek District. Has 5 references for further reading at end.
- Oxford African American Studies Center: This resource includes the African American history and the African American National Biography.
- FamilySearch Wiki (https://www.familysearch.org/en/wiki/Main_Page) good for governmental jurisdictional searches, such as country, state and county and records availability. Don’t forget to look at Books as well.
- Google Books (<https://books.google.com>) A good location for county histories of the 1800s (quality and quantity has decreased—check out the Research Wiki and Internet Archive if you cannot find what you want) and institutional annual reports.
- Google Maps. (<https://maps.google.com>) To get geographically oriented. Consider a “drive around” the neighborhood using Street View.
- Google Scholar (<https://scholar.google.com>) With regular Google and when searching for “orphan train,” I kept getting fictional accounts. Google Scholar found more scholarly work than even JSTOR.
- Internet Archive: <https://archive.org>; Their focus is on books but they digitize all media. The WayBack Machine, which saves webpages of the past, is found at this site.
- JSTOR, (<https://jstor.com>) collection of academic articles on a topic of restricted scope. Usually only available through an academic library. A “go-to” for me.
- Local libraries, museums and archives. Do not underestimate what might be found locally.
- Organizational newsletters and blogs of groups who focus on your topic. This could include national and local museums. Ethnic organizations, clubs, and websites.
- Personal collection. Don’t forget to look in your own collection for documents and related materials. While writing my KDP I went back and re-read all the newsletters published by the ethnic association of my ancestors. I found many nuggets worthy of inclusion.
- Peters, Nancy. “Reporting on Research: Standards Encourage Better Communication.” *Legacy FamilyTree Webinars*. https://familytreewebinars.com/download.php?webinar_id=1586
- University of Delaware. <https://guides.lib.udel.edu/c.php?g=85348&p=548061>; extensive offering of finding aids for research of context.

RESOURCES: FOR OTHER STUDIES AND RESOURCES
URLs reviewed in August 2021

- Byrne, David. "What makes a successful literature review?." *Project Planner*, 2017.
10.4135/9781526408518. SAGE Research Methods Online, found at an academic library.
- Grewal, Anju. "Literature Search for Research Planning and Identification of Research problem,"
National Institute of Health, <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5037943/>.
- Hare, CG, Alison. "In Time of Cholera: A Case Study about Historical Context." *FamilyTree Webinars*,
https://familytreewebinars.com/download.php?webinar_id=1591. Excellent example of a DIY
context study.
- Mills, CG, Elizabeth Shown. "Context: A Powerful Tool for Problem Solving," *Family Tree Webinars*,
Excellent example of gleaning all evidence from records due to understanding context.
<https://familytreewebinars.com/webinar/context-a-powerful-tool-for-problem-solving/>
- Morelli CG, Jill. "Content and Context: Conducting a Literature Search," National Genealogical Society
2021 Family History Conference, syllabus.
- "Write As You Go! A Methodology for Efficient Report Writing." A workshop probably given in
summer 2026. Sign up or eNews! for notifications at the Seattle Genealogical Society's webpage
(<https://seagensoc.org>).
- The Open Library, "How Do I Do a Literature Search," no date, no author.
<https://www.open.ac.uk/library/help-and-support/how-do-i-do-a-literature-search>
- Ulrich, Laurel Thatcher. *A Midwife's Tale: The Life of Martha Ballard, based on her Diary, 1785-1812*.
She squeezes out every clue out of the diary for this Pulitzer Prize winner. A classic. Amazon
<https://www.amazon.com/Midwives-Tale-Martha-Ballard-1785-1812-ebook/dp/B004FGMD9>