

Data Collection

Mastering Techniques in Genealogical Research

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“Having gathered these facts, Watson, I smoked several pipes over them, trying to separate those which were crucial from others and which were merely incidental.”

—Sherlock Holmes, AKA Sir Arthur Conan Doyle, *The Crooked Man*

As genealogists, a foundation of our work lies in the careful collection and accurate interpretation of data. Ensuring that we follow best practices not only enhances the quality of our research, but also upholds the ethical standards of our field. This presentation will take a deeper look into the essential aspects of data collection as outlined in *Genealogy Standards*, providing you with tools and techniques to manage and interpret genealogical data effectively and assure confidence in your response to tough genealogical problems.¹

Simply said: do you want to improve your genealogical skills? If so, you are in the right place.

To assist you, a Self-Assessment Tool is included at the end of this syllabus. Hopefully, you will also assess your responses, prioritize your weaknesses and establish an education plan.

Genealogy Standards serves as our guide, but we will cover only a portion of its helpful content, specifically Chapter 3, Standards for Researching, Collecting Data, items 19-28.

SCOPE AND HANDLING OF DATA COLLECTION

An important step in any genealogical project is defining the scope of your data collection. What question are you trying to answer? Your research question will determine the breadth and depth of the information you need. By setting clear parameters, you avoid the pitfalls of gathering excessive, redundant data, which can lead to confusion and inefficiency. Instead, you focus on obtaining relevant, high-quality information that contributes meaningfully to your research goals.

To avoid problems, your research question should contain:

- The name of a known person of interest
- A known event of that person of interest that provides a time and place

¹ Board for Certification of Genealogists, *Genealogy Standards, 2nd Edition, Revised* (Nashville : Ancestry.com, 2021)

- The interrogatory (who, what, where, when...) and
- What you wish to find.²

Creating a strong research question implies that you:

- Have proven that your person of interest (POI) is the right person. If you have any doubt whether you have identified the right ancestor, then step back a generation to prove it.
- Select only ONE known event. You may have several. In the presentation we selected the date of death because we had strong proof of his date and place of death— the death certificate. It is possible the date and place are wrong, but the further exploration of our POI's life will reveal the level of its accuracy. It is a starting point for your investigation.
- Avoid the interrogatory “Why” when seeking motivation for an action, e.g. why did they emigrate? Decision-making by our ancestor can be complex and multi-faceted and undocumented.
- Know what you want to find out. Focus on parsing out same-named people, a date and place of an event or a relationship.

The term “reasonably exhaustive research” can be intimidating, and difficult to decide when the standard has been met. Reasonably exhaustive research does NOT imply that you look at every document in the world, but rather, using your judgement as a knowledgeable genealogist, you identify the most likely documents that answer your research question.³ This implies that you are familiar with a wide variety of record sets, where they are found, and what they might yield. But, it also implies that you do not waste your time looking for documents that do not exist and you compose a Research Plan to prevent it.

Consider keeping two Research plans—one for Resources and one for Context. The former is more familiar, but the latter deserves your attention. We can interpret the documents so much better when we understand the foundation on which the record set was devised.⁴

Once your Context and Resource Plans are defined, careful handling of data becomes paramount.⁵ This means not only preserving the physical integrity of original documents, but also managing digital files with precision. Best practices in this area include following the rules set out by the archive, storing personal papers in acid-free folders, and ensuring digital backups are securely maintained. Proper handling preserves the authenticity and longevity of your sources, allowing future researchers to benefit from your careful stewardship.

² See Thomas W. Jones, *Mastering Genealogical Proof* (Arlington, Virginia : National Genealogical Society, 2013), Chapter 2, 7-8.

³ “Reasonably Exhaustive Research” is the first principle of the Genealogical Proof Standard. A good explanation can be found in Chapter 1 of *Genealogy Standards* and in *Mastering Genealogical Proof*, Chapter 3.

⁴ Elizabeth Shown Mills, “Context: A Powerful Tool for Problem Solving.” on FamilyTree Webinars.

⁵ Conceptually, this presentation is a follow-up to one presented at the NGS Family History Conference 2024, “Research Planning: The First Step to Solving Tough Problems.”

ETHICAL CONSIDERATIONS AND COLLABORATION

Genealogical research often involves working with various institutions, archives, and libraries. It is essential to approach these collaborations with respect and ethical consideration. Respect for source caretakers means adhering to the rules and guidelines set by these institutions, handling materials with care, and acknowledging the efforts of archivists and librarians who safeguard these treasures.

When using the work of others, it is crucial to give proper credit. Genealogical research is a collaborative endeavor, and building upon previous findings is standard practice. Failing to acknowledge the contributions of other researchers or the use of Artificial Intelligence, can undermine your credibility and the integrity of your work. Always cite sources appropriately, and where necessary, seek permission to use or reproduce materials. This ethical approach fosters a collaborative spirit and enhances the overall quality of genealogical research.

INTERPRETING HISTORICAL DOCUMENTS

A significant challenge in genealogy is interpreting historical documents. Reading old handwriting requires practice and patience. Developing a keen eye for nuances and anomalies is essential. Techniques such as comparing letter creation within the same document, using transcription guides, and consulting with experts can greatly improve your accuracy.

Understanding the meanings within historical documents goes beyond reading the text. It involves placing the information in its proper historical and cultural context. Terminology and abbreviations used in the past may not have the same meanings today. For example, occupations, legal terms, and social titles can vary significantly over time and regions. Contextual analysis helps in accurately interpreting these terms and understanding their implications within the document. By doing so, you ensure that your research conclusions are based on accurate interpretations.

<p>Slow down! It is hard to satisfactorily assess a document if you are interested in speed rather than quality. It takes discipline to do this.</p>
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NOTE-TAKING AND OBJECTIVITY

Effective note-taking is a cornerstone of genealogical research. Recording information systematically maintains objectivity throughout the process. Objective note-taking ensures that your records are factual and unbiased, reflecting the true nature of the sources you examine. This practice is critical, as personal biases can inadvertently influence how data is recorded and interpreted. Personal genealogical programs, and report writing using Write As You Research illustrate ways to record this information.

One strategy for maintaining objectivity is to clearly distinguish between content and comments in your notes. Content refers to the factual data extracted from a source, while comments are your interpretations or observations based on your research question. By separating these elements, you provide a clear and accurate record of your research process. This distinction also

makes it easier for others to understand and verify your work, enhancing its reliability and scholarly value.

Until you are more comfortable with the definitions of the terms content, comment and correlation, consider placing each in a separate paragraph.

CONCLUSION

Mastering the art of data collection in genealogy involves a combination of technical skills, creativity, and ethical considerations. By defining a clear scope, handling documents with care, collaborating ethically, interpreting historical texts accurately, maintaining objective and detailed notes, and rigorously analyzing sources and information, genealogists can significantly enhance the quality and reliability of their research. Adhering to the standards outlined in *Genealogy Standards* ensures that your work not only contributes to your understanding of your family history but also upholds the highest standards of genealogical scholarship.

Through these practices, genealogists can uncover and preserve the rich tapestry of their ancestors' lives, creating a lasting legacy for future generations. By following best practices in data collection, you not only honor the past but also contribute to the integrity and credibility of the genealogical field and your work.

RESOURCES

Community History Archives, newspaper site for the (primarily) Midwest and MA, CT.. <https://communityhistoryarchives.com/> Extraordinary. Go to Map to get their coverage.

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

Koford, Rebecca. "Evidence Mining & Context: Powerful Tools to Dig Deep," *Legacy Family Tree Webinars* (\$), BCG series, 11 October 2024. familytreewebinars.com/webinar/evidence-mining-context-powerful-tools-to-dig-deep-a-2024-reisinger-lecture/

Mills, Elizabeth Shown, CG. "Information Overload? Effective Project Planning, Research, Data Management & Analysis," webinar, *FamilyTree Webinars*, 22 November 2024. familytreewebinars.com/webinar/information-overload-effective-project-planning-research-data-management-analysis/

National Genealogical Society. "NGS Learning Center". <https://www.ngsgenealogy.org/genealogy-courses/>

Purdue University, "Free Historic Newspapers by State." <https://guides.lib.purdue.edu/digitalUSnewspapers>

Sperry, Kip. *Reading Early American Handwriting*. Baltimore: Genealogical Publishing Company, 1998.

SELF-ASSESSMENT TOOL

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This tool reflects my personal journey to becoming a better genealogist. Your starting point will be different than mine, but most genealogists take the path from Level 1 to Level 2, and some to Level 3.

How to use this tool:

1. Read each skill and each description for Levels 1, 2 and 3.
2. Circle the Level you are operating at now. Complete all the skills.
3. Identify the skill(s) where you are strongest and weakest.
4. Develop an education plan to strengthen your weakest areas.
5. Implement your plan.
6. Conduct this assessment annually to monitor your progress!

Your goal is to be a better genealogist tomorrow than you are today.

SELF-ASSESSMENT TOOL

Skill	Level 1		Level 2		Level 3
Genealogical life	Presumption that it is all online; use FS and Ancestry almost exclusively.		Using direct evidence, but you are starting to see problems that are not resolved with only direct evidence.		Working with indirect evidence, tick mark censuses, writing up your problems (personal research reports.)
Scope & Handling of data					
Research Questions	Never draft them		think about the question you are trying to answer; tracing multiple lines at once		Draft and write down the research question you are pursuing. Focused.
Record knowledge	Take whatever Ancestry or FS gives you		Using a few other national online sites; conceives that there are too many sites.		Focused research on specific relevant sites
Reliability & independence	Don't think about it; Just take what is given		Realizes that indexes are prone to errors; assesses the informant		Analyzes; actively assess reliability and independence of every source.
Respect for Records	"It's my ancestor, so it is my photo."		We break some of the rules, because we think they are silly.		We follow the rules of the repository.

Ethical Considerations				
Respect for Repositories	Never have visited an archive		Arrived unprepared	Called ahead; and are prepared. Ready to follow the rules.
Act courteously & w/ respect to the caretakers	Never been to an archive		You have an expectation they will do your research for you.	Prepare before visiting to respect the time of the staff
Provide attribution	"I'll remember."		Occasionally cite the work of others, but no consistency or standard	Try to always cite the work of others to CMOS or Evidence Explained 4.
Interpreting Historical documents				
Education	Attend only local GS, & seminars, some webinars		Attend national conferences, & seminars	Take advanced classes in institutes; Have an education plan. Target weak areas
Reading old handwriting	Skips the words & phrases you don't know		Ask for help, before researching the answer	Study your weak areas and ask for help to learn for the future. Learns from the experience
Broad context	Surname searches only. Just filling in the pedigree chart.		Checks for broad context only when cannot find records.	Develops a Context Research Plan; research context thru'out.
Note Taking & Objectivity				
Accurate recording of findings	Uses the work of others indiscriminately.		Mentally correlates and dreams conclusions but rarely writes out their thought process for others.	Analyzes and Correlates in writing.
Comments and content	Don't recognize any difference.		Recognize the difference, but mush them together	Separate each to make it clear to the future reader
confirmation bias, presentism, & romanticism	Don't know what those words mean, and do not see how they affect you		Research areas of good news while glossing over bad news	Recognize that decisions made in the 1800s may not reflect your values.
Overall assessment				
	No. of Level 1s:		No. of Level 2s:	No. of Level 3s:

