Helping Patrons FIND THEIR ROOTS
A GENEALOGY HANDBOOK FOR LIBRARIANS

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I retired as the manager of the Midwest Genealogy Center in Independence, Missouri, in 2013. I enjoyed many aspects of the job, but whenever I needed to hire new staff I was in a turmoil. I wasn’t sure if I should hire someone who was excellent in library skills but had no knowledge of genealogy, or find someone who was knowledgeable in genealogy but needed training in library procedures. Recognizing the right candidate was always a challenge. The right combination didn’t always present itself. Staff training was an ongoing procedure, even when the employee was a perfect fit.

You may be faced with the same conundrum. Finding and training employees is a difficult part of a manager’s job. But what if you are the one who needs training? When the task comes to finding training for yourself, it is important to take the initiative and begin the journey. All aspects of management, from training to
collection development, can be a challenge in genealogy librarianship. But with guidance, I’m sure you will be up to the task.

Genealogy librarianship involves knowing your subject, discovering how to help a patron get started in research, finding good websites and print resources, and uncovering networking opportunities. My experience in the genealogy field has given me insight into the skills needed by you and your staff in working with family historians. Genealogy resources have changed over the years and will continue to change. The journey you begin will continue to be a learning experience. During my career, my mind was opened to many new avenues of knowledge, and I’m sure yours will be too. I hope you enjoy the trek.
CHAPTER ONE
What Is Genealogy?

Your worst fears have been realized. You are alone at the reference desk and suddenly someone asks a question about genealogy. It is a topic that can have an unprepared reference librarian shaking with fear. Genealogy is a popular subject today. We see commercials on network television for Ancestry.com and can watch shows such as Who Do You Think You Are? Finding Your Roots, and Genealogy Roadshow. This “genealogy thing” has people curious about their heritage. It sounds so easy. Is it?

Historically, genealogy had a focus on royal lineages or in legitimizing a claim to land, wealth, or power. But since the 1970s, this popular pursuit has found Americans trying to discover their personal history. They want to know their origins, or as we sometimes say, their “roots.” We are a nation of immigrants and come from all different backgrounds. Many of us are asking, “From where did my ancestors originate?” The plethora of information on the Internet has made the pursuit easier than ever, causing many to feel they can go about this venture on their own. Can they? Or do they need the guidance of a librarian, or perhaps a professional genealogist? Are we prepared if they ask us, the librarians, how to do genealogical research? We
consider ourselves information specialists, but if we don’t know the 
basics of genealogy to give assistance to our customers, we are doing 
them, and ourselves, a disservice.

Many in the United States are far removed from their immigrant 
ancestors and their memories, and thus far removed from the names 
and stories of those ancestors. But for many, there comes a time when 
the mystery of their forebears is one they desire to solve. It happens 
to people at various times in their lives, but when it happens it often 
becomes a passion. The first explosion of interest in family origins on 
the American continent coincided with the bicentennial celebration 
of our nation’s founding and the publication of Alex Haley’s Roots in 
1976. The subsequent presentation of Roots on network television in 
the form of a miniseries added to its impact. Libraries, archives, and 
historical and genealogical societies were amazed by the burgeoning 
number of researchers wanting to trace their family history. I have 
fond recollections of the early days in my career in a genealogy library. 
Patrons were lined up outside the library, waiting for the front doors 
to open. When finally allowed to enter, they would walk hurriedly 
into the building to obtain one of the microfilm readers and begin their 
genealogical research for the day.

In 2010 Americans saw the first airing of Who Do You Think You 
Are? a network television show using famous personalities in search 
of their ancestry. First aired in the United Kingdom by the BBC in 2004, 
Who Do You Think You Are? took the British by storm. The program’s 
popularity spawned similar shows in other countries and eventually 
made it to the United States. Henry Louis Gates Jr. also used celebrities 
in filming Faces of America, which aired on PBS. When genealogy hit 
prime time, another surge of interest hit libraries and archives, as well 
as the Internet, and another generation of genealogists was born.

Who am I? Where did I come from? It is the quest for the answers to 
these questions that helps us discover who we are. Somehow, we feel 
our own identity is linked to our ancestors. When we were young, 
our identity was linked to the smaller world of our parents, grandpar-
teins, siblings, aunts and uncles, and cousins. We didn’t venture much 
out of that realm. Much of our security and even a sense of family 
pride depended on our relationships with these people. As we have 
aged, our world has become wider and our experience with the world 
vaster. Now we have learned that, in addition to our living relatives,
we had family who came before those still living—those who are now long deceased. These are called ancestors. Our curiosity about older generations of our families is but an extension of our search for identity and security. The memories we collect tell us who we are.

Learning about history also arouses our interest in family history. When I first visited the World War I museum in Kansas City, Missouri, I began to wonder about my own family’s participation in that war. Did they play a part in that world event? What were their lives like during that time? We read about other wars, economic hard times, epidemics, and other historical events and wonder how our family fits in. Sometimes answers come as we sit around picnic tables at family reunions, or at weddings and funerals as we visit with relatives. As grandparents, aunts, uncles, and parents reminisce about the past, children begin to learn the stories of their family of long ago. However, in today’s mobile and disjointed world, children are often unaware of near kinfolk or perhaps even the identity of one of their parents. When we don’t have family stories to enrich our understanding of our forebears, the answers to questions about our ancestors’ lives and roles come only through discovering those relatives in books and original records.

Learning about our ancestors helps us understand ourselves better. The process of genealogical research and its discoveries helped a friend of mine in such a way. Here is her story in her own words:

My parents divorced when I was three years old. I was left in the custody of my father. I felt as though a dark, mysterious, unknown chasm lay ever before me in my life. I knew nothing of my mother’s family tree, having been raised by my father and a stepmother. In fact, I questioned why God had given me such a birth mother, as her life was not very exemplary. Then, with a friend’s help, we spent two years delving into the genealogy of my mother’s side of the family. During that study, a longtime family mystery was solved and a new world was opened to me.

I found I had four great, great, great, great-grandfathers who fought in the American Revolutionary War. A great, great, great-grandmother in Kentucky who birthed thirteen children, rode horseback throughout the mountains working as a midwife, and healed the locals with herbal remedies.
I saw beyond my mother’s generation to a well-respected family of founding forefathers and brave pioneers. A JOY filled my heart as the dark chasm was crossed, and the light of knowledge found in those genealogy books, microfilm, and on the computer changed my life forever.2

Through genealogical research we discover inherited traits that affect our own personality or health. As I look at photographs of my grandmother in her early years, I can see features which link with mine. Knowing that our hair or eye color and other physical traits were influenced by ancestors helps us recognize how firmly tied we are to past generations. This link to the past provides a measure of stability in a world filled with transient values and heroes. Our research may also benefit us by providing an early warning of health problems we or our children could inherit that might be avoided by taking timely precautions. This potentially unknown aspect of one’s health history may be the impetus for beginning a genealogy research project. The surgeon general of the United States has created a free online tool for recording family health history to share with one’s relatives. Entitled “My Family Health Portrait,” it can be accessed at https://familyhistory.hhs.gov.

**Who Are Genealogists?**

A genealogist can be anyone: male or female, young or old, and of every ethnicity. In 2008 Scott Lucas, a doctoral candidate at Emporia State University, surveyed genealogists at three libraries: a public library, a proprietary library, and a historical/genealogical library. Lucas determined that the average genealogist is female and over 40, and often over 50, years old. The genealogical researchers surveyed had achieved a higher education level than the average person, and most traveled less than fifty miles to their research site. Members of the National Genealogical Society (NGS) often traveled farther and more often than members of other national historical organizations.3 But this data does not limit the scope of those who pursue an interest in genealogy. The motivation to begin a genealogical journey can draw people of all ages, ethnicities, and genders. Genealogists are also avid in their avocation. In my many years as a genealogy librarian, I saw family history enthusiasts who came into the library every day. Others came
once a week or once a month, but we considered them regular users of the library as we developed professional relationships with them. A frequent once-a-month visitor to the library once came with her husband to the facility, which was not a usual occurrence. The husband had the day off from work and decided to accompany his wife for what he thought was a couple of hours of research and then he would join her for lunch. About noon he wandered to the microfilm reader where she was busily engaged in her exploration. He asked her if she was ready to eat lunch. She kindly told him, “We do not each lunch when we come to the library.” That was the last time he accompanied her on a research trip.

Where Does It All Begin?

We all have unknown facts in our family history. As we ponder those unknowns, it is helpful to discover what we already know. We find that out by writing down the known aspects of our forebears. The basics of beginning a genealogy project are as follows:

- Write down everything you already know (birth, death, and marriage information—also called vital records) about yourself, your parents, grandparents, and so on.
- Ask your immediate and extended family for information about themselves or their parents, grandparents, and so on.
- Look for documents in your own home or in the possession of your relatives.
- Search out documents that tell more about your ancestors in books, original records, and on web pages.

Genealogy, simply defined, is the study of one’s family origins. More specifically, it is the history of a line of descent of a person, family, or group of ancestors. This can also be called ancestry. In genealogy, we seek to find ancestors. Ancestors are those family members who lived before you. Your parents, grandparents, and great-grandparents are your ancestors. You are a descendant of those ancestors. A descendant is one who lives after someone else. One’s children, grandchildren, and great-grandchildren are descendants. A record of one’s ancestors is called a pedigree. Anyone who is related to you but is not in your
direct line of descent such as an aunt, uncle, or cousin is considered a collateral or allied relative.

Is It Genealogy or Family History?

A genealogist is concerned about his or her blood line. That individual’s interest in research would be to discover his or her genealogy. Those who are interested in the full scope of their family with its collateral lines would be searching for family history. I will be using the terms genealogy and family history interchangeably. Each person determines the scope of his or her research. Everyone has their own specific goal in mind and decides when that goal has been completed.

Genealogy, as it has already been defined, is the study of a person’s lineage. We search out the names of parents, grandparents, and great-grandparents and list them on a chart. We then continue to search for the names of the children of each generation, as well as the persons those children married. Since names are often repeated in each generation, dates and places of events in which those names are recorded help define each person. A genealogy, in its truest sense, identifies ancestors or descendants by showing their names, event dates, event places, and relationships.

Family history, on the other hand, is a study of our ancestors’ or descendants’ lives. Once the family historian has reconstructed a lineage using names, dates, and places, he or she then searches for stories, artifacts, records, social history, and other information that describe the activities and experiences of family members. Family history explores how people interacted with other family and community members, how they earned a living, and what they experienced and believed. Family historians search for any resource that will permit them to reconstruct their ancestors’ lives within the world in which they lived. Within a family history, our forebears become defined not only in terms of names, dates, and places but also by what they did during their lives. We are looking for biographical information, but we are not creating a biography, per se.

Trying to define genealogy becomes increasingly more complex in our society today. In July 2011 the New York Times printed an article entitled “Who’s on the Family Tree? Now It’s Complicated.” The author points out the difficulty of defining relationships, family, and
genealogy with children born via sperm donors, surrogate mothers, and same-sex partners as parents. “Some families now organize their family tree into two separate histories: genetic and emotional.” These researchers face the same challenges that adoptees have had for many years. There may be unknowns in one’s family tree that will never be discovered. Deciding on the scope of the project is a necessary first step when beginning a genealogical project.

**Beyond Genealogies**

Genealogists often become collectors of names. I have encountered many genealogy patrons who are proud of the number of names in their genealogy computer program. But a pursuit that consists solely of finding the names of ancestors does little to acquaint us with those forebears and the world in which they lived. Knowing the facts of birth, marriage, and death seldom satisfies the drive to relate our lives to the experiences of our progenitors. This is where family history comes in: it is the study of how ancestors lived and their relationships with people and institutions. The pursuit of family history helps us completely understand the names on our pedigree as individuals and makes them seem real to us. Compiling our genealogy is the first step in discovering the history of our family.

Until the late 1970s, few genealogies told the story of a family. Most consisted of traditional lineage and ancestor or descendant charts. But over the last forty years, more and more books use genealogies as a framework upon which to stretch the fabric of individual and family lives or family history. These latter publications are devoted to describing, interpreting, and comparing ancestors’ lives with those of their contemporaries and of their descendants—us.

Family historians find out about ancestors’ lives from interviews, family records, and other documents that teach us how historical events affected and changed (or did not change) the lives of our forebears. Knowing about our ancestors’ health, the size and structure of their families, and how long they lived or from what they died will also help us to better understand them. Our ancestors were not passive observers of their time; they were involved in the world around them—politics, strikes against employers, controversies over religious or racial issues, and the founding of new towns and cities. Where did
they stand, and how did they act out their feelings? The answers to these questions will help us understand history from a personal perspective that is seldom presented in textbooks. Many history teachers are now incorporating genealogy and oral history into their curriculums in order to help their students understand more about history. To learn even more, we can compare our ancestors’ lives to those of their neighbors and even to contemporaries in other parts of the country. Like us, our progenitors were the products of their own place and time in history. We cannot relate to them unless we understand what it was like in their day.

Resources for Genealogy and Family History Research

The Records

The major obstacle to finding one’s ancestors is knowing where to look for records about their lives. Sometimes these records can be found at home or with relatives. But often, we need to search books and records preserved in libraries, archives, historical societies, or government offices. Many documents, both digitized copies of the originals and transcribed records, are found on the Internet. Wherever one may look, the goal of genealogy research will be an understanding of one’s ancestors and the places they lived, as well as the roles of local institutions in their lives as revealed through the records of those ancestors’ interactions with those institutions.

Generally, a genealogist will search among three types of records to reconstruct the family’s history: family records, the research results of others, and original records. These records may be found in someone’s personal possession, in a records repository, in a research facility, or on the Internet. In this chapter, the three types of records are introduced to help you better understand the process your customers will use in re-creating their ancestors’ lives. Each of these record types is explained in greater detail in subsequent chapters.

Research begins in the records you and other family members have. One should also conduct a survey to discover what other researchers have published or contributed to genealogical indexes, computer databases, or the Internet about one’s family. Additionally, one can fill in
the remaining gaps in a family’s story by using original records such as censuses and birth, marriage, or death records.

**Family Records**

Family records are the certificates, heirlooms, stories, and other bits of family history found in one’s own home or the homes and memories of one’s relatives. Besides documents, they include the oral histories gathered by interviewing family members and their friends, neighbors, and coworkers. Although some people may have gaps in their memories of the past, many of their recollections may be true. Oral records must be evaluated for accuracy, as must any other sources used.

**Published Records**

When researchers take information from original and oral records, evaluate and enhance it, and then publish it, we have another type of resource: published records. Some genealogists have taken all the names and other personal data from vital records, cemetery records, and other original records and published them as research tools for others to use. An example is *The Original Lists of Persons of Quality . . . 1600–1700.* The compiler created transcripts of original records which he found in the Public Records Office in England which list the names of people who legally left the shores of England for America. It is a wonderful source for those looking for ancestors who were colonial immigrants from England.

Such published research may have been contributed to genealogical or historical societies, libraries, newsletters or periodicals, or published in books. Although the term *research* evokes visions of dusty volumes on library shelves, it can also include the Internet, computer databases, card indexes, and pedigree and family chart files kept at local genealogical or historical societies and libraries. It is simply the research of other persons that has been made available to the public.

There are many other types of published sources that genealogists use: family and local histories, biographies, newspapers, and genealogies are examples. They describe events that generally took place many years before the history or genealogy was written. They may be based upon research found in original sources but are a later interpretation.
of those sources. Some of these family histories, genealogies, and biographies may have been published as books or Internet pages, while others may have remained in typescript or manuscript form.

Newspapers are printed matter that contain material that was generally current at the time of publication. One can find accounts of marriages, obituaries, local gossip, and other events and ephemera happening at the time. These publications are sometimes still in a paper format, but they are more likely to be preserved on microfilm or in electronic form.

**Original Records**

Under the term *original records* fall documents created by public (government) or private agencies to describe your ancestors or their activities. Birth certificates, marriage licenses, and wills probably come to mind as you think about original records. You will learn that churches, businesses, and clubs, as well as national and local government agencies, created many records that detail parts of your ancestors’ lives.

Less frequently used sources can also be applied in family research. Court records will inform you of trials or lawsuits that involved your family. The minutes of town or religious councils may name your ancestors as participants in local events. Even if your family is not mentioned in records, such records will at least indicate what was happening in the community that may have touched your ancestors’ lives.

Original records may be created at the time of an event or much later. Their purpose is the same no matter when they were created: to witness that an event took place and list those people involved. The birth and marriage records found at many county courts are examples of original sources. Sometimes an agency or institution will create a document that describes contemporary events, as well as some that took place many years before the document was created. These are original records, too. For example, a driver’s license lists a person’s birth date but was created many years after the person’s birth. A death certificate describes the date and place of death, but it also contains information about the date and place of the deceased’s birth or marriage. A census shows us where a family lived and those persons who were in the household, but it may also list the ages and birthplaces of these persons.
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