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A Client's Family Brought to Life: Incorporating Social History

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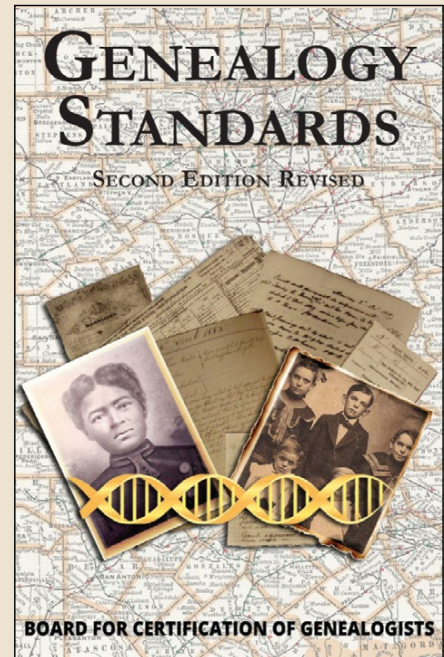
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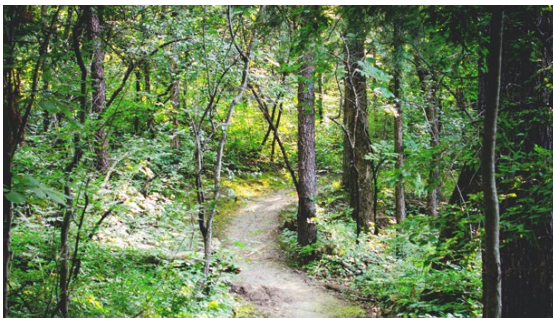
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Taking Delight in Our Work



by Annette Burke Lyttle

“If you do what you love, you’ll never work a day in your life,” goes the saying attributed to musician and actor Marc Anthony.¹ A companion saying, attributed to writer Marsha Sinetar, is, “Do what you love and the money will follow.”²

Those inspiring words may have led many of us to professional genealogy. I’ve often said being a professional genealogist is the best job I’ve ever had. But we working genealogists know that what we do is not all joy and material riches. Another saying also applies: “When you own your own business, you can choose which eighteen hours a day you want to work.”³

The Working Genealogist

With all the deadlines for client research, articles, and presentations, the red-eye flights to conferences, the wondering how to make enough so the tax collector believes we’re a real business, it can sometimes be hard to recover the delight that first brought us into the field. If we’re not careful, working as a genealogist can begin to feel very much like the stressfest we may have left behind in an earlier career. Even those among us who have retired can feel the pressure of too many ancestors and not enough time to tell all their stories.



By Artur - stock.adobe.com

Many factors contribute to the stress potential for our jobs. We generally work alone at every task, from CEO to janitor, and often we find ourselves doing mostly non-genealogy work on any given day.

Many of us have taken on demanding volunteer positions, have family members to care for, or still work at other jobs while transitioning to genealogy. The list goes on.

1. “Do What You Love Quotes,” *BrainyQuote* (brainyquote.com/topics/do-what-you-love-quotes).
2. “Do What You Love Quotes,” *BrainyQuote*.
3. I could find no information as to whom this saying might be attributed.

A Google search for “managing stress” returns 2.8 billion results, so there’s lots of advice out there about how exercise, sleep, sunlight, adult beverages, and the like can affect our stress levels. All that is good, but I have a couple of genealogy-related stress reducers to suggest. They may even help us find that delight in our work once again.

Origin Stories

Like superheroes, genealogists have origin stories. Most of us can point to a moment when we received our superpower (being hooked on family history), when the mantle of Guardian of the Family Stories placed itself around our shoulders. Taking a moment to think about and write down our genealogy origin stories can help us recapture that feeling of delight that turned us into family historians.

The origin story I’ve been telling, it turns out, is a myth. I know when I became interested in my family tree because I have dated letters I received in answer to my requests for family information. I was about eleven. Somewhere along the line, though, my faulty memory injected fiction into my origin story.

I was a Girl Scout, and I loved earning badges. I had a clear memory of learning what a family tree was and going to my mother to ask for help on how I could get the information I needed to construct one. In that mysterious way that our brains sometimes function, I was sure I remembered that I got the idea from a Girl Scout badge called the My Heritage badge.

Recently, I dug out my Girl Scout handbooks and learned there was no such badge at the time. Thus, family legends are born.

I know that something—a magazine article, a TV show, an overheard conversation—caused me to discover that such a thing as a family tree existed. My wonderful mother had me write to my grandmother, my deceased grandmother’s

The other thing I’ve learned lately about reducing work stress is that I have to take time for my own ancestors.

sister, and my great-grandmother asking what they knew about their forebears. It was magical when their replies came back with names and dates and places. I was hooked.

Great-grandma Mayme (Woodward) Hundey’s list of ancestors included her great-grandfather, David Woodward, who was born in 1793. I was blown away. I now knew the name of an ancestor who was born in the 1700s. As I write this, I can feel again the profound thrill that knowledge brought me.

Even though I made a bit of a hash of the facts, revisiting my genealogy origin story allowed me to recapture the delight of that first venture into family history. It reminded me of why I became a family historian and eventually a professional genealogist—not to mention allowing me to correct the record about that fictional badge.

Think about your origin story and write it down for your own pleasure, inspiration, and stress reduction. Maybe it will also please and inspire some of your descendants. If you want to share, I’d love to see it. You can send it to president@apgen.org.

Time for Our Ancestors

The other thing I’ve learned lately about reducing work stress is that I have to take time for my own ancestors. For years, I’ve felt I was too busy to work on my own research, and I know that’s a typical feeling among working genealogists. In the last year or two, I’ve rediscovered the joy of uncovering my family stories by trying

to give myself an hour a day to work on a project of my own.

Some days I can’t fit it in, and other days I find myself able to spend two or three hours on my family. As long as it works out to about five hours a week, that’s fine. It’s amazing how much I can accomplish in five hours a week!

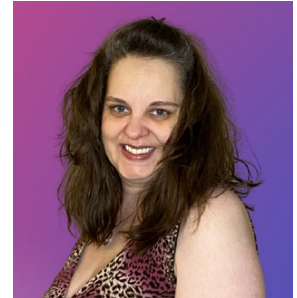
Learning to work regularly on a project for myself has shown me that I don’t have to wait till I have a big block of time to pick up that project. On those few occasions in the past that I’ve managed to set aside a few hours for my own work, the first hour or so is spent figuring out where I was and what I needed to do next because I hadn’t touched the research in a while. Such a waste of precious time.

The advantage of working for short periods every day, or almost every day, is that I remember what I did during my previous session, where I left off, and what I need to do next. I’m so much more productive, and the joy and satisfaction of making progress on my own research have helped reduce my stress and increase my delight.

Find What Works for You

We’re all individuals. What works for me may not work as well for you, but it’s worth finding out what it takes for you to find delight in your work. Try a few things until you find something that gives you that joy, that thrill that led you to the best job in the world in the first place. Then incorporate it into your work life and let the happiness infuse all you do.

Try Something New



by Julie Cahill Tarr

Spring is all about renewal, and for that reason, I usually find myself trying something new. It may be a new genealogy method or tool, a new business strategy, or even a new way to balance life and work. This year, I plan to work on work-life balance. I really need to prioritize the “life” side of the equation because I spend way too much time focusing on my business.

Last year my new thing was starting a sleep routine in which I have a two-hour wind-down period. I stop all activities at 10:00 p.m. and spend two hours relaxing, which typically involves working on a jigsaw puzzle or coloring while the TV is on in the background. By midnight, I’m able to head to bed, fall asleep almost immediately, and no longer have restless nights. It’s been empowering, as I have more energy and am more productive.

This year, while I have goals for my business, I am putting a lot more focus on my personal goals. How am I doing this? Time-blocking. A lot of people choose to block out time in hourly increments, but I break my day into three parts. First, mornings and early afternoon are for client/contract/student work (about six hours). Second, late afternoon is for business admin tasks (about two hours). Third, evening is for personal activities (about four hours), such as my own genealogy research and spending quality time with my husband.

What’s something new you might try? Perhaps this issue will give you some ideas.

While her article is geared toward client work, Gena Philibert-Ortega explains how to incorporate social history into research, which is a good lesson for all of us. Maybe this is the something new you want to try.

Paul Graham’s article discusses reasonably exhaustive research in the real world. His suggestions may be that something new you want to try with client work.

Sarah Ferguson Potter shares with us how she applies her genealogy research skills to working on documentary films. That could be your something new, or maybe her article will inspire you to think outside the box to see where else

you could apply your skills “outside” our field.

Also in this issue, Drew Smith curates various productivity resources, such as books and podcasts, that we might find helpful (and who knows, you may find your something new to try in one of them). Cyndi Ingle shows us how to fix broken links in a continuation of her “Language of Links” article. Plus, Angela McGhie provides the inside scoop on genealogy conferences.

I hope you’ll join me in trying something new. Whether it’s related to your business, your personal genealogy, or your life in general, take advantage of the season of renewal to make a change in your own life.

Enjoy!



Photo by Arno Smit on Unsplash

Continuing Education Took Many Forms in 2022

by Committee Member Amanda E. Perrine, MSLIS

Thank you to all the APG members who reported their 2022 continuing education (CE) hours this past January.

In the next *Quarterly* issue, we will describe the quantitative data gleaned from the 2022 reporting results. Until then, we thought you might enjoy a peek at some of the qualitative data we have received. It is clear that members have built their genealogical career skills in a multitude of ways over the past year. Below are some of the many responses we received in answer to the question: What activities were most helpful to you and why?

As you are creating your 2023 education plan, consider some of the descriptions below of what other APG members found most helpful in 2022. You may be inspired you to try something new or realize that you are participating in more CE than you thought.

Quotes

“I attended NGS for the first time in 2022—life-changing experience! I was able to attend the most advanced sessions with leaders in our field, which stretched my knowledge of methodologies to solve hard problems. I spent a lot of time at the Board for Certification of Genealogists (BCG) booth reviewing certification portfolios and meeting other genealogists. Having a week away from all other responsibilities allowed me to focus intensely on my genealogical goals.”

“I attended eight webinars through our local genealogy society, which were all done by well-known genealogists including several APG members. Two that were particularly interesting were “French-Canadian Genealogy” with Margaret Fortier

and “Polish Genealogy” with Jay Biedny. I have no ancestors that are French-Canadian or Polish, but the presenters and their methods of both presentation and research captivated me. I’m convinced that I can learn to be a better genealogist no matter the topic if it’s well researched and presented.”

“Finding and reading obscure books that were written closer to the time period I’ve been researching (1830). This includes county histories, county folklore books, books authored by Swanton, Hawkins, Speck, etc., as well as newer authors such as John E. Worth and John H. Hann. Also, deep research into the Georgia lotteries (including their process and surviving records) and other substitute records for the missing early Georgia census.”

“The APG Chicago Chapter discussions are always helpful as I learn from the experience of others. I also really enjoyed Paul Woodbury’s PMC lecture about learning as you go and its impact on client research, and Rhonda Lauritzen’s in-depth look at pricing strategies. These two lectures were the most helpful for me as far as reviewing my current client strategies and pricing structure.”

“Conferences outside the genealogical community, but related to my area of research . . . significantly broad-



ened my knowledge base, expanded my learning network, and provided opportunities to increase awareness of what family history research has to offer other research communities.”

“I have found many of the BCG webinars on the Legacy Family Tree Webinars website to be very helpful as they keep me up to date with BCG standards and new topic areas. I also learn from watching the speakers themselves: how they lecture, how they communicate, and the types of handouts that they provide attendees.”

“APG Virtual Professional Management Conference: although much of the material covered in the various lectures could be learned through reading articles and books, and one-on-one conversations with other professionals, it is extremely valuable to experience them as a group, with the ability to question and interact with others, both in real time and virtually.”

“I learn by a combination of reading/listening and doing. Being able to apply what I’ve learned soon after I learn it helps me to imprint it on my brain so that I have a hope of retrieving that knowledge in later situations where a similar technique, skill, or resource is needed. So, one of the most impactful series of presentations was about the 1950 census.”

“The support from both accountability and peer review groups has kept me moving to complete two articles. They have been submitted and accepted for publication.”

“Pimsleur language studies were extremely helpful because it helped me acquire strong enough reading comprehension skills to understand genealogical records in other languages. Legacy Family Tree Webi-

nars are extraordinary and help me on a weekly basis refresh my genealogical knowledge, as well as learn new information on a wide variety of subjects and locales.”

“I am an accredited professional who works in my business full time. Kimberly Powell’s Scrivener course and her Writing for Discovery course helped me discover a more efficient process for brick wall client work.”

“Creating presentations was most helpful as I learn subjects to a deeper degree while preparing to teach others.”

“I enjoy case studies the most. In a webinar format, I can pause and go back to parts of it. The handouts and discussion were also helpful. The case studies provided suggested approaches that I could use in my research and the brick walls of my clients. Webinars also allow me to fit [CE] into my schedule.”

“I like learning through podcasts because it allows me to multitask. I most often listen to podcasts when I run and I think something about the combination of exercise and learning helps those lessons stick in my brain!”

“Studying the *Chicago Manual of Style* was most helpful because it guided me in my ability to source evidence correctly.”

“Volunteering at the FamilySearch Center, where I had no idea what I was going to be working on, had to think on my feet, and be creative about the resources needed for the visit and research.”

“Near the end of the year, I read and particularly appreciated *Italian Women in Basilicata: Staying Behind but Moving Forward during the Age of*

Mass Emigration, 1876–1914 by Victoria Calabrese. My own ancestors, and those of a number of my clients, are from Basilicata, and this work helped me understand what pulled them to leave the region their family had lived in since before documentation began.”

“I did a fair deal of reading about time management, which helped me identify which tasks are important to my goals to perform and which low-value administrative tasks can safely be brushed off.”

“The study and review of circa 1784–1810 early Quebec/Upper Canada land grant processes and records was crucial to understanding where in Upper Canada an individual from New Jersey settled between 1794 and 1811.”

“I’ve read quite a few [books], but actually peer-reviewing a book was a new experience for me and I gained much insight from it. Attending webinars is always helpful because I almost always learn something new.”

“The self-directed, in-depth study of Quaker migration was most helpful to me in 2022, as I’m working on a Quaker family for my certification portfolio.”

“I’m a volunteer researcher for DNAngels. They use genetic genealogy to identify birth parents for adoptees and others. This work has given me a chance to see the differences between genetic genealogy and traditional genealogy. The community is very helpful and supportive. The role can be challenging but it’s been an excellent learning and service opportunity so far.”

**All responses used with permission.*

A Client's Family Brought to Life:



"Eigenbrod family at the homestead, later the site of Riverside Community College, Riverside, California, ca. 1899."
Preserved by the California Audiovisual Preservation Project (CAVPP). Source: archive.org/details/c_000547.



Incorporating Social History

by Gena Philibert-Ortega, MA

“Names and dates on genealogical charts were fun—for a while. Then I remember thinking, ‘Is this all there is to genealogy? But I want to know more about my ancestors than the dates things happened.’”¹ In some cases, clients who engage your services only want to know a name, date, and place or just need a specific record pulled. They may be applying for a lineage society membership where a focused search is mandatory. Some clients want to stick to who begat whom. But for many others, what they are curious about is the story behind who their

ancestors were. That story can be found by incorporating social history into genealogical research.

The What and Why of Social History

In her book *Bringing Your Family History to Life Through Social History*, Katherine Scott Sturdevant defines social history as “the study of ordinary people’s everyday lives. It is history from the bottom up instead of the top down.”² What this means is that social history looks at everyday lives and not the achievements

1. Sharon DeBartolo Carmack, “Foreword,” in *Bringing Your Family History to Life Through Social History*, by Katherine Scott Sturdevant (Cincinnati: Betterway, 2000), xi.

2. Katherine Scott Sturdevant, *Bringing Your Family History to Life Through Social History* (Cincinnati: Betterway, 2000), 6.

Social history is history that incorporates the “common folk” and all aspects of their lives. . . . It’s the content that makes movies interesting, books readable, and a story come to life.

of “great men.” She further states: “Having a social history perspective means that one sees historical events as they affected groups collectively, not just as they affected exceptional people individually.”³

Any *Star Wars* fan knows the scrolling text at the beginning of the movie sets the scene for what the viewer needs to know before the action actually starts. Once the action starts, the story is told by using location, costuming, language, action, set dressing, and more. Genealogy is the scrolling text and social history is the other aspect of the movie that the producer and actors use to tell the story.

What this means is that you can change the way you think of genealogical research from a pursuit that strictly reports biological facts and arranges them in a descendancy or ascendancy chart. Social history is history that incorporates the “common folk” and all aspects of their lives—from what they ate and wore, to the houses they lived in and what constituted their daily lives.⁴ It’s the content that makes movies interesting, books readable, and a story come to life.

Historically, genealogy clients have been concerned with finding who they descend from, but greater emphasis in the genealogical world is now placed on “family history” and focusing on the stories of families. The idea of incorporating social history isn’t a new one; it’s currently used in various genealogical applications. The famous actress appearing on that well-loved genealogy television show may learn the facts of her Salem Witch Trial ancestor, but knowing what happened to the accused is much more meaningful for both her and the television audience than a birth and death date flashed on the screen.

What does this all mean for you if you’re conducting research for paying clients? Incorporating social history takes time. It means you need time to better understand an event, historical era, or activity. It takes time to identify supporting documents that go beyond the typical genealogical records. It takes time to analyze and add a nonfiction narrative to a client report. All this might add up to time you may not have under client-imposed budget restrictions.

However, if we consider social history when we negotiate with the client, we can explain how that social history lens can help them (and their family) better understand their ancestral roots. A successful combination of genealogy research and social history will be more interesting for the client and their family and may result in requests for more work or answers to additional questions. Budgeting time for expanding on a fact or a story can be done and can be limited—it doesn’t need to be done for every person in the family tree. Clients could pick and choose their own questions and what they want to know more about so that the process becomes more meaningful to them.

Every project is different and social history may not be appropriate for all projects, but when used, it is a powerful tool for understanding families and documents. You can refer to various resources to get ideas on how other genealogists use social history (see the “Further Reading” sidebar).

3. Sturdevant, 6.

4. Robert M. Taylor Jr. and Ralph J. Crandall, *Generations and Change: Genealogical Perspectives in Social History* (Macon, GA: Mercer University Press, 1986), xi.

Further Reading

Starmans, Barbara J. *Tracing Your Ancestors’ Lives: A Guide to Social History for Family Historians*. South Yorkshire: Pen & Sword Books, 2017.

Sturdevant, Katherine Scott. *Bringing Your Family History to Life Through Social History*. Cincinnati, OH: Betterway Books, 2000.

Taylor, Robert M. and Ralph J. Crandall. *Generations and Change: Genealogical Perspectives in Social History*. Macon, GA: Mercer University Press, 1986.

Resources for Social History

In the pursuit of finding genealogical information, you don't want to ignore the other scholarly disciplines that can help you understand and locate records, add historical context, and tell the story of everyday life. Genealogists can aid their clients by incorporating information they have gathered via formal education or previous work experience in analyzing genealogical records. Other disciplines can help clients understand their ancestor's everyday life in historical times. These disciplines include:

- Archeology
- Ethnic History
- Geography
- Microhistory
- Military History
- Sociology
- Women's History

Social history resources are as vast as genealogical resources and include the familiar. Utilizing historical publications, images, and newspapers is a must. These can be found on genealogy websites, digitized book and newspaper websites, and in other digital collections. Familiarize yourself with periodical indexes such as JSTOR to find not only historical articles but also the work of historians researching that time period, place, or activity.

What Does Adding Social History Look Like?

All research starts with a question. That question leads to a plan and sources. Social history raises questions that go beyond basic biological facts like birth, marriage, and death. Instead social history seeks to answer how life affected the ancestor and/or their family. For example, social history might ask:

- What type of house did they live in?
- What did it mean to work in a mill?
- Why were potatoes so important to the Irish that they needed to immigrate?
- When a soldier was serving overseas in World War II, what did the family face on the home front?
- What did it mean to be an unmarried mother in colonial America?
- What was it like to be a German immigrant in the United States during World War II?
- What was daily life like for Mexican Braceros?

These questions can arise from genealogically relevant records, or they can be a byproduct of writing the report.

As we continue exploring genealogy with social history, here are three ideas to get you started with your next client project.



Lewis Wickes Hine, 1874–1940, “7 year old shucker. Speaks no English. Father and Mother earn about \$15 a week, and this little one works steady and her six-year-old brother same.” Lowden Canning Co. Location: Bluffton, South Carolina. <https://lccn.loc.gov/2018675349>.

1. Using Social History to Understand Records

One way to incorporate social history into a project is to better explain a record. For example, consider the US World War I draft cards. While this is a record professionals are well acquainted with, most clients won't be familiar with it or the time period. Just telling a client their ancestor appears in the draft is meaningless. Aside from the biographical information on the record itself, you can explain what filling out a draft card meant for the men who were required to do so. Then you can answer questions such as:

- What were these men told about the draft?
- What questions did they have to answer?
- What did this mean for the client's ancestor and their circumstances at the time?

Answers can be found by reading histories and historical newspapers that include Q&A articles explaining the draft registration process.

Looking at genealogical records with a social history lens adds more depth to the research and assures that correct analysis and assumptions are being made. This goes beyond just learning about the record itself to asking questions about how it affected

the person being documented, what that person knew about the record, and what those answers meant for the person's life.

2. Using Social History to Visualize the Past

Some records can be better understood by incorporating images. While the client may not have photographs of their ancestor, images found in digital collections and repositories can assist you in telling the story in a meaningful way.

Let's say you just found the client's ancestor in the 1910 US census and they are listed as a child working as an oyster shucker. Most people understand what oyster shucking entails, but they don't have any context for what it meant to be a child working as an oyster shucker. If you provided an image of that, it could help the client better understand and ask additional questions about

their ancestor's life. The photo doesn't need to be of the individual ancestor; it is instead a story meant to provide that social history to the client's family history. You could add an image from the Library of Congress's National Child Labor Committee Collection (loc.gov/pictures/collection/nclc) to illustrate the story and then continue on with histories and reports to explain what that child's life was like.

Adding images is an easy way to add social history for a client, whether an illustration of the ship their ancestor arrived on, images of an occupation's tools, the fashion of the time, or even a bird's-eye view map. Images help tell stories, and this is one way you could help your clients better understand their ancestors' stories.

3. Time Traveling with Historical Publications

Clients may not have the necessary historical context to understand their ancestors' lives. Being told that their ancestor was part of a historical event or experienced a historical activity isn't enough. For example, if a client's grandmother was a child forced to leave Mexico with her family during the Mexican Revolution, what was that experience like? Just knowing this and the fact that they fled to Arizona aren't enough without interpretation and context. To help a client understand, you could provide copies of relevant materials, such as historical newspaper and magazine articles, booklets, pamphlets, or a bibliography of books, textbooks, audio resources, and documentaries, about the Revolution and its impact on people's lives. Another example could help a client understand what an ancestor was told about masking during the 1918 influenza pandemic by providing copies of articles in public health newsletters and popular magazines.

Your Client's Family

Clients hire genealogists for a variety of reasons, but many ultimately want to know the history behind their family story. They've watched the television shows and wondered if there is a story out there that adds to their place in the world. Dry facts are no longer sufficient to illustrate family history in an age of video, images, and virtual time travel via selfies. Explaining your client's ancestor's life beyond the facts opens up a world that will engage them and their families for years to come.



Gena Phillibert-Ortega, MA, is an author, researcher, and instructor whose focus is genealogy, social history, and women's history. She holds a master's degree in interdisciplinary studies (psychology and women's studies) and a master's degree in religion. Her current research includes women's repatriation and citizenship in the twentieth century, foodways and community in fundraising cookbooks, and women's material culture.

Free Websites and Finding Aids for Social History Sources

Where can you find social history? The information you need goes beyond familiar genealogy websites. Look for websites that provide digitized content including images and period books and periodicals. Don't forget about the collections found at libraries and archives. The following are just some free websites and finding aids that you'll want to refer to:

ArchiveGrid: researchworks.oclc.org/archivegrid

ArchivesCanada.ca: archivescanada.ca

British Library's Digital Collections: bl.uk/catalogues-and-collections/digital-collections

DPLA: dp.la

Europeana: europeana.eu/en

Flickr the Commons: flickr.com/commons

Google Books: books.google.com

Google Scholar: scholar.google.com

Hathi Trust: hathitrust.org

Internet Archive: archive.org

JSTOR: jstor.org

Library of Congress Digital Collections: loc.gov/collections

Library of Congress Prints & Photographs: loc.gov/pictures

Periodical Source Index: genealogycenter.info/persi

Trove: trove.nla.gov.au

WorldCat: worldcat.org

World Digital Library: loc.gov/collections/world-digital-library/about-this-collection



“Reasonably Exhaustive” in the Real World

by Paul K. Graham, AG, CG, CGL

Measuring the daily work of genealogy against standards tests all practitioners. When projects do not reach an obvious completion, it is easy to get trapped into thinking the standards cannot be fully met consistently. Frustration only increases when the work is judged without consideration of our real-world limitations, an obvious concern when doing timed research for paying clients. We might be criticized (by ourselves or others) for not meeting the expectation of solving a problem, provoking self-doubt even when those expectations are unreasonable

considering time and financial constraints. Acknowledging the boundaries that exist outside the standards allows us to measure ourselves against more reasonable expectations.

Genealogy Standards

Our discussion begins with the Genealogical Proof Standard. We are asked to conduct “reasonably exhaustive research . . . for all evidence that might answer a genealogist’s question.”¹ The language within the standard is contradictory when it asks us to find

1. Board for Certification of Genealogists (BCG), *Genealogy Standards*, 2nd ed. rev. (Nashville, TN: Ancestry, 2021), 1.

Appropriate expectations and feedback concerning standards need to respect the researcher's time and financial commitment to the goal.

“all evidence” but calls that request *reasonable*. A more measured approach appears in Standard 19: “Genealogists attempt to collect all information potentially relevant . . .” to the research question.² Built into the word “attempt” is recognition of real-world limitations like time and money.

Asking the Right Question

When discussing a genealogical problem, someone may ask, “Did you conduct reasonably exhaustive research?” Or, they may say the Genealogical Proof Standard has not been met because more research needs to be done. While intended to provide support or motivation, the concern can come across as condescending when it omits the context of time or financial limits. If one person is judging results based on a ten-hour limit, but another is imagining one hundred hours, the disparity can lead the first person to give up on further discussion.

The statement “this is not reasonably exhaustive research” includes an unspoken assumption about the researcher's resources. The statement may not be a valid critique if it stands alone with no context. Appropriate expectations and feedback concerning standards need to respect the researcher's time and financial commitment to the goal.

Defining Reasonably Exhaustive

Six concepts enumerated by the Board for Certification of Genealogists (BCG) help define *reasonably exhaustive* further. They offer a framework for assessing the first element of the Genealogical

Proof Standard prior to incorporating real-world considerations. Internalizing these standards maximizes our research results, even when under time constraints.

Scope. Consider a variety of sources, expand beyond the primary individual, and incorporate broader historical events and trends. *Reasonably exhaustive research* involves depth and context. It seeks not merely to generate a list of sources but also to bring clarity to the research question.³

Reliability. Information collected immediately following an event is more reliable than any recorded later. Sources created in an open forum like a court are less likely to contain biases that might affect conclusions. However, we can still use unreliable and biased evidence if we understand and acknowledge its meaning.⁴

Discrimination. Every source should have a justification for its use. Irrelevant sources should be omitted, and we must be able to articulate the reason.⁵

Independence. Evidence items derived from a single originating source are not unique contributions to the research effort.⁶

Details. Research is not reasonably exhaustive unless we have mined all possible information from each source to develop multiple evidence items. Leaving information unexamined creates gaps that limit the correlation and conflict resolution process.⁷

Correlation. Strong conclusions are based on evidence derived from multiple independent sources. We not only seek agreement between information items but also try to uncover conflicts and inconsistencies in evidence that need to be resolved—all of which strengthens our argument.⁸

Defining Limits of Time and Money

BCG offers guidance for assessing whether research is reasonably exhaustive, but it does not speak to real-world constraints. When researching for clients, professional genealogists are limited by a simple formula. We charge an hourly rate, our clients define their expendable funds, and the combination defines the hours we can work on a project.

$$\text{Total Funds} / \text{Hourly Rate} = \text{Number of Hours}$$

With hours defined, we can proactively assess expectations. Before research even starts, what do we expect as the likely outcome?

2. *Genealogy Standards*, 16, Standard 19.

3. *Genealogy Standards*, 25, Standard 41.

4. *Genealogy Standards*, 26, Standard 44.

5. *Genealogy Standards*, 25, Standard 42.

6. *Genealogy Standards*, 27, Standard 46.

7. *Genealogy Standards*, 24, Standard 40.

8. *Genealogy Standards*, 27, Standard 47.

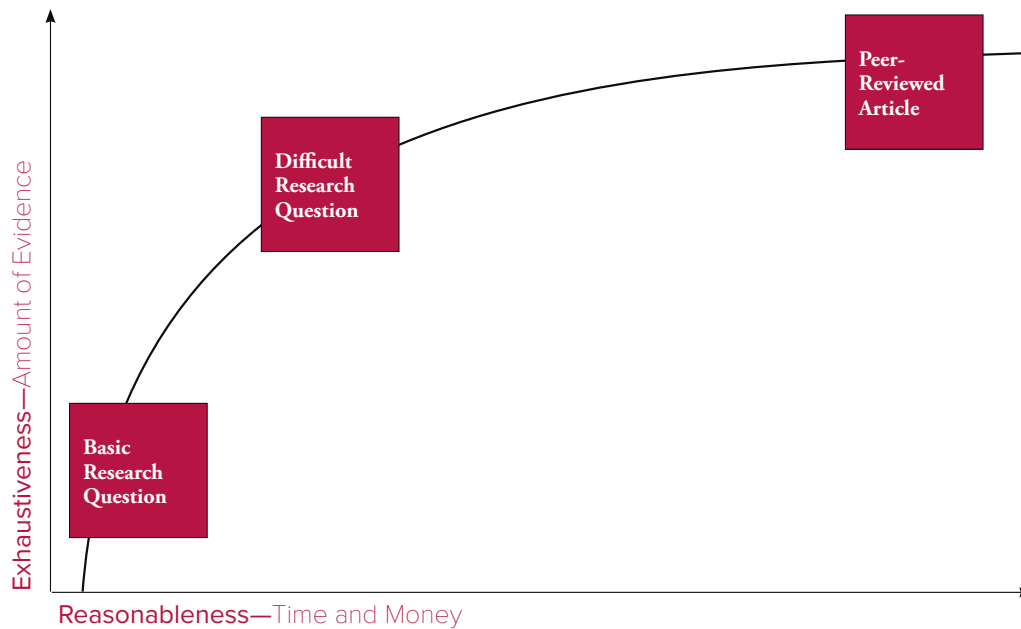


Figure 1

1. Best-case scenario: Reach an answer within the hours that meets the highest and best definition of reasonably exhaustive.
2. Real-world scenario: Answer the question with a more limited expectation of reasonably exhaustive based on time and financial constraints.
3. Insufficient scenario: Acknowledge that meeting the reasonably exhaustive standard is not feasible (and propose additional research time to get closer to the standard).

Scale of Reasonableness

Visualize the relationship between reasonableness (time and money) and exhaustiveness (amount of evidence) with the Scale of Reasonableness (figure 1). In a straightforward research question, we can use a limited amount of evidence that does not take much time to collect. When projects are new, there is a lot of evidence waiting to be gathered in a small amount of time. When we push the limit, we reach a point where developing incrementally more evidence takes a significant amount of time.

Maximizing Research Results Despite Limits

The hard limits of time and finances are difficult to change, but we can improve our own abilities to maximize results. A framework of efficiency and effectiveness provides structure for developing our skills.

Efficiency

Time is money. Working inefficiently limits what we can

accomplish and whether we can meet the reasonably exhaustive research standard. It might even leave us second-guessing whether we should charge all our time to the client. Consider the many ways we can improve efficiency.

RESEARCH PLANS

Developing research plans can feel like a waste of time. Why write out the steps when you could be doing them? However, this skill is required for conducting the most efficient research. A plan requires you to proactively identify the existence of each source and justify the time needed to obtain and incorporate it into the research.

Use your body of knowledge to predict answers, judge the usefulness of sources, and determine the breadth of context required for each research question. Briefly deciding whether to use a source is more cost-effective than doing the research and later determining that the source is not relevant. In addition to a list of sources, make notes to yourself (physical or mental) estimating the length of time each source may take for collection, analysis, correlation, writing, and processing for delivery. The process will help determine how the plan aligns with the budget.

BUDGET

Budgeting is not easy. No matter how much experience we have, inevitably, we end up in situations that challenge the budget process. But, the more experienced we become, the more we understand the amount of time it takes to find and analyze any particular record.

Prioritize direct evidence but develop abilities to formulate and write indirect and negative evidence arguments when those would be more cost-effective when considering time constraints.

Proactively break down the elements of each project and the time they will take. Divide total project time into broad categories of research, writing, administration, and delivery. Research is then subdivided using the plan, adjusting either the plan or the time as needed. Budgeting writing time may be the most challenging thing we do as genealogists. Remember that writing time is thinking time, and thinking is valuable. Allow for more time than you initially expect. Include the time needed to create deliverables and communicate with the client within the project budget.

RESEARCH

Practicing the mechanics of research improves efficiency within the process. These are many of the things we traditionally focus on in our genealogical education, such as:

- **Finding Aids.** What are the indexes and publications available for your problem? How confident are you using them?
- **Search Queries.** How good are you at forming search queries in databases? Can you construct a flexible but specific search (Rob*s?n = Robinson, Robertson, Roberson, Robison)? Do you know where to find information about each website's wildcards and other search functions?
- **Paleography.** The more you struggle to read documents, the slower your process will be. This impacts researchers at all levels, not just beginners. You may have difficulty because an individual records is hard to read or the language or style is different from that with which you are familiar.

- **Record Access Choices.** Be deliberate about how you access records. The amount of time it can take to gather and process easy-to-access sources can far exceed the time needed to order and wait for delivery of a single high-quality record.

TECHNOLOGY

Genealogists work with various technologies to document research results, write reports, capture images, analyze geographic information, and complete many other tasks. How confident are you working with computers, scanners, images, databases, and the many software applications that help us do our jobs better? In addition to specific genealogical education, we should seek out opportunities to strengthen skills that speed up the process of creating our work product.

WRITING

Research means nothing if we don't put it in writing, but doing it efficiently frustrates many of us. Maximize time by writing simply and comfortably. Learn from others but develop your personal style and voice. Choose a time, place, and ambiance most conducive to getting your words on the page.

Keep real-world expectations in mind when looking for models of client reports. The great examples of genealogical writing appear in journals, which are thorough and precise. However, we should not compare our research reports to thoroughly vetted articles that have been through multiple revisions before publication. Even though you want to write reports as well as possible, comparing them to published articles is inappropriate considering the wide disparity in the time invested in each. The more you write and edit, the more the process will settle in your brain and writing will take less time in each iteration.

Effectiveness

In client research with goals tied to an amount of time, we need to cover as much ground as possible. This does not mean looking at all possible documents. Instead, it means addressing as many relevant aspects of the research problem as possible. Effective research means we gather a representative sample of high-quality sources that allow us to achieve the goal in as few steps as possible.

Even though it does not address real-world limits directly, the language of the BCG standards for sources, information, and evidence provides a framework for anticipating timed research needs. The most important is the standard for *discrimination* (i.e., justification).⁹ Justify the sources you include *and omit* from your research. Make sure your choices maximize the time at your disposal. Incorporating justification into your work product

9. *Genealogy Standards*, 25, Standard 42.

strengthens your message. It teaches the client about the process and gives them confidence in your abilities. Plus it gives you confidence that you're reaching the right conclusions.

Being judicious expands beyond individual sources to the entire research goal. If the expectation is to investigate multiple ancestors, but we only research one in our time, we have not approached the situation correctly. We may have met what we consider the reasonably exhaustive standard for that one ancestor, but the client will be disappointed that we did not consider the entire research goal. We have not considered what is reasonable for each ancestor given the time constraints.

Think about the types of sources, information, and evidence being used. In general, the flow of research begins with a foundation in authored works, then utilizes derivative sources to identify key original documents that can be obtained within the time limit.¹⁰ Consider three examples with unique pitfalls:

1. When all sources are authored, the client may not consider our work to be substantive research.
2. When all sources are derivative, we can end up with abstracts or index entries for far more individual documents than is reasonable to analyze, correlate, and reconcile within the time limit.
3. When all sources are original, it takes longer to locate and process each one, and we do not get as far in the research process as we might when using a balanced approach.

Similar considerations should be placed on information and evidence. We should prioritize primary information, but this does not mean avoiding secondary information.¹¹ When using secondary information in a client report, note the reason and explain what needs to be done to find primary information in the future. Prioritize direct evidence but develop abilities to formulate and write indirect and negative evidence arguments when those would be more cost-effective when considering time constraints.¹²

Differences between projects leave us to make determinations of the most reasonable approach for developing proof. Think about the client's expectations (or better yet, ask them). If they asked for documentation of their ancestors, a balance among source types would prioritize original sources for direct ancestors and use derivative or authored sources for aunts, uncles, and cousins. In this way, we lean toward the *reasonable* and avoid the pitfalls of trying to perform *exhaustive* research but still working within standard.

Stopping Research

Performing research within limits means accepting that research must stop. We feel: "How can I quit now if I haven't answered the research question?" The direct answer is: "You stop work when you stop getting paid." The lack of funding is justification for stopping. Working unpaid hours means we are making much less per hour. Without discipline, we do not develop good strategies for working within time and financial limits while retaining our value as professionals.

To help stop research, our secret weapon is the report's Future Research section. Our brain does not stop at a time limit; it keeps pushing us to do more. Instead of putting that mental energy into more research time, write a list of things you wish you could do. This is a useful exercise—not just cathartic—because the result becomes a sales pitch and research plan for the next round of research.

Conclusion

The Genealogical Proof Standard is not a magic formula. It is the framework for conducting thorough and well-reasoned research. Any assessment of work against standards—particularly the request for *reasonably exhaustive research*—must be balanced with consideration of the real-world limitations imposed on the project. Recognize the impact of time and money on the work and develop skills to maximize output within those boundaries.

Being comfortable with real-world flexibility is not an excuse to reduce quality. Instead, it allows us to properly assess results and their relation to standards without misguided expectations. Defining *reasonably exhaustive* appropriately provides confidence in a sea of constraints.



Paul K. Graham, AG, CG, CGL, is a research manager at AncestryProGenealogists, where for more than a decade he has adhered to genealogical standards within a high-volume corporate research business. His research expertise spans the English-speaking world, with a particular focus on the US South. Paul holds a master's degree in public history and has authored and co-authored numerous books and articles, most pertaining to families and records from the state of Georgia.

10. *Genealogy Standards*, 23–24, Standard 38.

11. *Genealogy Standards*, 24, Standard 39.

12. *Genealogy Standards*, 24–25, Standard 40.



A Crooked, Winding Path to a Career in Storytelling

Photo by Zack Silver on Unsplash

by Sarah Ferguson Potter

My origin story in genealogy is not an uncommon one. I, like many, loved sitting around the table on holidays, listening to stories from years ago, and hearing family members debate legends and tall tales without quite all the details. My grandmother had a treasure trove of antiques in her basement that we kids would rummage through while the adults had their coffee. Cookbooks were falling apart at the seams, there was an old mink stole that freaked us all out, and an ancient-looking photo album that fascinated me. Its velvet cover and brass bindings held dozens of photographs from another era. I asked my grandmother who the people were—she had no idea.

I was dumbstruck that we had an album full of relatives who were so important at one time we held a rare photograph of them in an album. How could we not know who anyone was? I started pulling out the cabinet cards and cartes de visite (although I had no idea they were called that at the time), looking for clues on the

back. I couldn't accept that no one would ever know who these people were. They were family!

Through my teens and twenties, genealogy was a fun hobby, an escape, an afternoon spent at the library going through microfilm and local history records. In the thousands of hours I spent researching, it never occurred to me that it could become any sort of career. I ended up going to school to pursue elementary education with a specialization in speech-language pathology. Genealogy was still there, but it was for special projects during holiday breaks and summer when I had off from my school job.

My day job was great, but I can't say it was my dream job. I had worked hard, propelled myself to the top of that field, and was doing a lot of things others in my profession would love to aspire to. Once I had my second child and I knew we were done having kids, I started thinking about what was next. I had

nowhere to go in my career. Did I really want to keep doing the same thing for the next thirty years? Was I excited to get out of bed every morning and get to work? Did I spend my time learning more so I could be better at my job? The answer to all of these questions was no. I felt stuck.

A New Purpose

My husband was the one with the big dreams and I was happy to support that. Scott was the most creative person I had ever met. He played half a dozen instruments and was a talented artist, fantastic speaker, and gifted writer. But most of all, he was a visionary filmmaker and storyteller. It was exciting to watch from the sidelines. As his business grew, his need for help increased. I thought my research and project management skills could be of use to his film productions; I spent my spare time behind the scenes helping some of those projects come to life.

Then, the unthinkable happened. An unexpected medical event sent my husband to the emergency room and then to the ICU, incapacitated and in excruciating pain. Our lives stopped. An in-between purgatory of not knowing if he would make it lasted through the end of 2019, then straight through the start of the pandemic, and sadly ended in July 2020. I had lost him. I felt like I couldn't breathe, see straight, or understand the world around me. All I could do was survive and try to take care of my children in the midst of a pandemic. I was lost and nothing—not even my passion for research and family history—interested me anymore.

In time, I found I was also grieving the stories and creative visions my husband and I invested in. He left several projects unfinished. I couldn't bear the thought of them being forgotten. Not only was Scott a fantastic storyteller, but he told stories that were powerful, compelling, and had the potential to change the world. He never wanted any of the glory but sought the impact these stories had on the people they were about.

Shortly after he passed, I remember his mentor reaching out to me. He let me know the filmmaker community was there for me, in any way they could be. Most immediately, they could help me with any unfinished projects. There were several, but there was one that I knew had to be made, which was a documentary on a rare disease that only affected children.

I told his mentor I wanted his production company to finish it. He asked if I'd like to intern on production with them. Me? I had never been on a film set. Everything I had learned about film production was only tangential. I was five months into grieving my loss, it was the middle of the pandemic, and I immediately said no. I couldn't do that.

But my friends and family pressed me. This was a once-in-a-lifetime opportunity and a chance to spend time with Scott's filmmaker family. Worst case scenario, I would get away and

Through my teens and twenties, genealogy was a fun hobby, an escape, an afternoon spent at the library going through microfilm and local history records. In the thousands of hours I spent researching, it never occurred to me that it could become any sort of career.

experience something new. Instead, I came home with a new purpose. I loved my experience on set. What I learned through an incredibly traumatic experience is that nothing is guaranteed and our lives are meant to be lived with purpose and passion.

I finished out the school year and began learning about the filmmaking process. I realized I didn't need to be the one operating the camera or editing the final piece (thank goodness). What I loved boiled down to storytelling. Now, there's a difference between the buzzword "storytelling" that's been floating around for the better part of the last ten years and what I realized was at the heart of my passion. I am talking about the kind of storytelling that draws you into a character instantly, has you rooting for them throughout their journey and holding your breath during their sorrows, and then, at the end, moves you to a new perspective. I attended seminars, took courses, hung out with filmmakers, and volunteered for or secured new film jobs. A lot of people thought I had lost my mind, or that I was making impulsive decisions out of grief. It didn't matter. I had discovered what had been there all along. I loved storytelling whether it be family history, writing, or filmmaking.

Over the past two years, I've fully immersed myself in this new field and career. The filmmakers I've worked with have seen my fresh perspective as a newcomer to the industry as a valuable asset, bringing new skills to the table. But there's been plenty to learn too.

The Work

The research needed for film projects varies greatly. My projects have ranged from short corporate films to full-length documentaries. Most recently, I began working on a documentary about a prolific, well-known artist who is still alive and painting today. The assignment was to discover everything I could about the artist and the themes surrounding the documentary and prepare a report of my findings. Sometimes parameters are given by the director or the producer to narrow down the search, but for this particular project, it was wide open. This film will be a biopic, which is ripe with opportunities to utilize the skills that enabled me to hunt down long-deceased ancestors.

For this project, my approach started with answering three essential questions:

1. **What do you know?** The director of the film shared what was known to him based on his team's research and initial discussions with the artist. They gave me some of the basics like name, demographics, a short description of his career, and milestones. These plot points help shape what details and gaps I can fill in with research later.
2. **What do you need to know?** Next, we talked about what needed to be found. We needed a timeline detailing some specifics about the artist's childhood, family members, and career highlights. Other objectives were vague and required some interpretation. Determining the artist's

motivation to pursue art, what he wants to convey and accomplish with his paintings, and who his greatest inspirations were, are just a few of the questions I sought to answer. There was also a general objective of finding everything we could about his life that we don't know yet. It's a big undertaking, but one that is critical in the film-making process. The scope can expand or change quickly during research or even filming.

3. **Where can I find the information?** This is when I get to work on my own. For a project like this, we are talking about recent history. I began by doing an extensive search of past interviews, news articles, television appearances, and podcasts. Anything the artist has said can direct my investigation. For anything unconfirmed by the artist, I knew I had to find multiple sources and present the best case with the evidence available.

Because this project is a biopic, I decided to divide things up into periods of his life. I scoured every source I could find to learn more about his childhood, family life, hometown, teenage years, young adulthood, early career, rise to the top of the art world, and everything in between. There was also an entire section devoted to future plans. What did this artist hope to accomplish this year, next year, and in the next ten years?

Not all projects have been this open-ended. Last year, I worked on a documentary that took about nine months. The focus was



Author, cameraman, and director on set with the family they are filming for a documentary.

the founder of a cryptocurrency product—projected to be the fastest-growing asset in the history of the world—and his devoted community of followers. He is a controversial, brash, unfiltered character (even by cryptocurrency standards) who was either going to be heralded as one of the richest men in the world or a genius-level scam artist who swindled more than a billion dollars in what would be considered the largest Ponzi scheme ever pulled off.

A project like this is where many of my past skills used in genealogy research proved useful. My objectives were:

1. **Find a skeptic archetype character.** My task was to hunt down a cryptocurrency expert—someone who understood the blockchain complexities and could scrutinize the legitimacy of the product.
2. **Investigate the founder's background.** This is what felt most familiar. In no time, I had identified this man's birth date, birthplace, parents, extended family, former addresses, previous companies, and court records. There was speculation about civil and criminal court cases both domestically and abroad. Because I knew how the court systems were structured and how to track down records, it was an easy win. Later, the team hired a private investigator to make sure we hadn't left any stone unturned. It was a great feeling to see that that report paled in comparison to mine.
3. **Locate quotes, claims, and confessions.** As the story came together, the research needs narrowed. The directors needed quotes, footage, and other assets to show just how colorful this particular man was. My task was to scour every YouTube video and stream he'd ever put out and find the top ten in several categories (most outrageous, intelligent, early days, during the launch of the project, and post-project). I'm happy to say after watching more than four hundred videos of this man talk for hours at a time, we definitely found the best of the best.

I was a part of a team of researchers for this project which meant each of us had different tasks, but as the story took shape, so did the research needs. The story was happening in real time. That meant frantic calls from the directors and producers asking me to find a particular quote from a video or a list of the most outrageous tweets for someone to react to on camera.

The Similarities

You may be able to compare my experience with some of your experiences in more traditional genealogy research projects you've done. I've found that similarities lie in both the foundations of research and the ethical standards developed by APG.

My process for genealogical research parallels my work for films in some ways. Research results need to be clearly organized



Author producing on set at a hospital.

in a way that distinguishes facts from opinions, goes beyond any research bias or conflicts of interest, and evaluates and cites sources to reach the final conclusions. Because I've developed a relationship with the crew I've spent the most time with, they don't care so much about the research process as they do about the results. All my research is carefully sourced, which helps if a question arises about where it was found and if it's accurate. Often the sourcing is on a need-to-know basis and more helpful for tracking my research to show what I've already looked at. I'm responsible for the accuracy of my research, and errors could have a variety of consequences for the project.

The professional and client relationship is also similar. It's important to set clear expectations for the researcher and the client by providing written agreements about the scope of the project, payment details, and deliverables. Confidentiality of client communications and research is paramount. The researcher often signs an NDA (non-disclosure agreement) to protect the production company. Because the bulk of my projects involve

living people, I must take extra care and caution with respect to confidentiality.

Like in a traditional genealogy research business, I may juggle many projects at one time. I've had three to four projects going at once, but I like the diversity. It can turn stressful if I'm not organized, efficient, and clear about my role. Fortunately, I've worked with wonderful crews who were committed to open communication and putting out the best end product possible. With this high level of quality comes commensurate pay. I've found that film projects tend to be more well-funded than my other genealogy projects. The compensation varies by project and type of agreement. I've learned it's important to set a project rate, a day rate, and an hourly rate. Most often though, I've worked with an overall project rate. If I'm on set, it's a day rate.

The Differences

What differences have I noticed? So far, I've found the scope of my work involves a lot more interpretation and analysis. I have thoroughly enjoyed not only hunting down the information needed but also presenting it in a way that paints the picture of who someone is or figuring out how it best supports the objectives of the film. It's important to know what those objectives are. What's unique about this story? Who is the intended audience? What does the director want the audience to feel and do after watching?

I also realized I use a wider variety of sources than I have in the past, on a much larger span of topics. I'm used to dealing with the past and historical context. Thus far, the films I've worked on are happening in the present or in recent history. This allows for utilizing social media, YouTube, the Internet Archive (archive.org), and recent media. There's a lot of information out there, but it requires a lot of time to sift through and interpret.

Working with a team is not something a genealogist always gets the opportunity to experience. I must say working with a group of film professionals who are all excited, engaged, and committed to the same topic has been wonderful! As a researcher, every project differs but typically I interface with the director, producer, associate producer, graphic designers, and people who appear in the film. It's also a great way to engage with different professions. Other researchers I've worked with are anthropologists, journalists, and writers. Genealogy can be an independent venture and journey. Working with a team provides new perspectives, ideas, and collaboration I hadn't yet experienced with my family history work.

Breaking into Film

Think films are something you'd like to get into? If you are someone who enjoys finding the story behind the facts, it's a great way to engage and grow your storytelling skills. While fact-checkers are also needed for certain productions, my favorite part of

working in film is weaving the facts to tell a narrative. If you have excellent collaboration skills and enjoy working within a team, you'll find a lot of excitement in sharing your findings and being a part of a group all trying to accomplish the same thing.

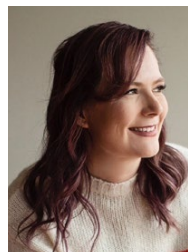
If you're ready to start applying, here's what to be on the hunt for when looking for open positions or projects. Generally, using Indeed (indeed.com), LinkedIn (linkedin.com), or other job posting websites can produce results by searching for positions that include the keywords *researcher*, *storyteller*, or *producer* (depending on the type sought). Small studios, production companies, or individual filmmakers may all post jobs. The skill set needed is similar to that of any other research position. Research skills are needed first and foremost, but also project management, how to conduct an effective interview, and the ability to deliver information in a clear, thorough format to engage others.

I've found that filmmakers' Facebook groups are a great source to find potential projects. Many exist that focus on local, regional, and national projects. You can keep an eye on the latest postings for new films and advertise your own skill set, so others know you're available for work. If you're more of an in-person networking type, start by finding out what production companies, filmmaker meetups, groups, and events are happening in your area. Once people meet you and get to know what you can do, they may contact you for future projects.

Final Thoughts

For me, documentary films have been the most compelling, but there's always a need for consultants to provide their expertise and knowledge to all types of films. Put yourself out there, in front of the right people, and be open! You might feel intimidated venturing into a new space, but finding new ways to use our passions and skills is not only fulfilling but also stretches us to be better well-rounded researchers.

Sitting in the theatre when a project is finished and seeing how the team took your research and turned it into a beautiful, engaging film is an indescribable feeling.



Sarah Ferguson Potter is a storyteller, researcher, and producer. She uses her broad experience and passion to create, which involves family history, documentaries, and writing. She's currently working on two full-length documentaries and researches house histories, genealogy, photographs, and local history for clients.

Keeping Up with the World of Productivity: Books, Blogs, Podcasts, and Videos

by Drew Smith, MS, MA

As professionals, we already know about the importance of continuing education. Genealogy, as with all other professions, doesn't stand still. There are new technologies, new ideas to improve our methodologies, new repositories, and new record collections. Plus, it's always a good idea to refresh what we already have learned to remind ourselves of best practices. The same is just as true for productivity practices as it is for genealogical practices.

But the options for improving our knowledge in the area of productivity can be overwhelming. A search for productivity-related books on Amazon provides more than fifty thousand results. Blogs about productivity likely number in the dozens (a conservative number, to be honest), and over time, new ones appear, and old ones become inactive or even unreachable. Several dozen podcasts focus on productivity, and some of these are also available as videos.

In this article, I will share what I consider the best books, blogs, podcasts, and videos about productivity. Don't worry if you prefer to get your information via email because many of these same content creators offer a regular newsletter, too!

Curling Up with a Good Productivity Book

As a librarian, you can expect that I have a special place in my heart for books. For more than forty years, I have purchased and read as many organization and time management books as one could reasonably own (if not more), although in the past few years, I have avoided print books in favor of those that I can carry around with me on my tablet (using the Kindle app). In the earliest years of my collecting, the books made heavy use of the term "time management," as if that was all that was required to be productive. But over the past several years, books of this type have moved to using references to "productivity" and "systems," indicating that it's really about identifying what is important and focusing on that, not merely about managing time. Don't get me wrong—even the most current books do talk about time—but they do so while discussing prioritization and avoiding spending time on things that don't (or, at least, shouldn't) matter.

For instance, I would recommend Laura Vanderkam's most recent book, *Tranquility by Tuesday*. Vanderkam identifies nine strategies to

Most productivity books are also available as audiobooks, which is particularly useful if you find that your best time to consume a book is during a daily commute.

Source: Grafiker61 - <https://commons.wikimedia.org/wiki/File:2001-Summit.png>



One of the benefits of using a blog reading tool such as Feedly is that it can tell you which blogs you are actually reading and which ones you are always marking as read without opening any of the articles.

minimize wasted time, adopt routines that will make us more habitual about good productivity practices, and, most importantly, help us feel less stressed about how much time we have and how we use it. One of the interesting things about the way Vanderkam goes about her writing is that she tests her ideas with a group of volunteers, who give her specific feedback regarding how each activity has worked for them. She also identifies how to take each routine to the next level. For instance, her first strategy is about adopting a standard bedtime and then following that up with small things that can be done each morning (meditation, journal writing, exercise, etc.) to help us become ready for the day's work.

Vanderkam is a prolific author, and I've also read her books *168 Hours: You Have More Time than You Think*, *Juliet's School of Possibilities: A Little Story About the Power of Priorities*, and *Off the Clock: Feel Less Busy While Getting More Done*. While there is a little bit of overlap between the ideas in the various books, each book presents content that is looked at in a fresh way, with new strategies. Finally, as a parent of five children ranging in age from infancy to early teens, Vanderkam certainly appreciates how difficult it can be for parents to find time to be productive!

If you've been reading the previous articles in this column, you likely have guessed that I'm also a big fan of author Cal Newport. He is a full-time computer science professor at a major research university and began his series of productivity books by addressing the needs of high school and college students. But today he not only has published a series of books for a much broader audience, he also writes regular articles for *The New Yorker* and manages to produce a regular podcast (more on that later). Newport's most recent books are *Deep Work: Rules for Focused Success in a Distracted World*, *Digital Minimalism: Choosing a Focused Life in a Noisy World*, and *A World Without Email: Reimagining Work in an Age of Communication Overload*. Whether you are self-employed or work for a larger company, you are going to benefit from any of his books. His focus is especially on finding those blocks of time that allow you to do creative, mindful work while not being constantly interrupted by family, co-workers, phone calls, and email.

Most productivity books are also available as audiobooks, which is particularly useful if you find that your best time to consume a book is during a daily commute.

Shorter Reads: Productivity Blog Articles

I've already named enough books to keep you occupied for a while, and by the time you finish those, you can expect that Vanderkam and Newport will have something new to read. But sometimes we have just enough time set aside to read an article related to productivity, especially one that covers a brand-new topic, such as an announcement of a new productivity tool (or an old one going away). Books can take years to come out, so blogs are a good source of written material that is as fresh as possible.

Ever since the demise of Google Reader, I have kept up with blog postings using Feedly, a free service that runs on my browser and is also available as an app for my tablet and smartphone. The mobile apps are especially handy when I am in a medical-office waiting room and have the time to catch up on productivity news. Today, I follow about two dozen active blogs that I categorize as productivity. They vary in how often they publish articles, anywhere from as many as nearly four hundred articles a month (*Lifehacker*) to as few as about one article a month. Should I mention that both Vanderkam and Newport have blogs?

One of the benefits of using a blog reading tool such as Feedly is that it can tell you which blogs you are actually reading and which ones you are always marking as read without opening any of the articles. So if you find that you are following a productivity blog but you're never reading any of its posts, you can unfollow it. Feedly also lets you search for blogs by topic and see how active they are.

My Eyes are Busy Elsewhere: Listening to Productivity Podcasts

Several days a week I drive to and from my full-time job, so I'm unable to use that time to do any productive reading. Instead, I listen to a few productivity podcasts using the Overcast app on

my phone and run the output through my car's audio system.

My top choice is *Deep Questions with Cal Newport*. This is currently a weekly podcast, and each episode is around ninety minutes long. Newport spends a portion of each episode in a “deep dive” into some topic in which he is currently interested, some ideas of which are quite likely to end up in his next book. He also addresses questions sent in by listeners, either through email or phone calls. A weekly ninety-minute podcast is a lot to listen to, but fortunately, Newport provides good show notes for each episode and identifies what he covers with a time stamp as to when it begins. I look through the list of what he covered in an episode and listen to just those topics that are relevant to my own needs.

My next favorite productivity podcast is Erik Fisher's *Beyond the To-Do List*. Episodes average fifty minutes in length, so I'm usually able to finish an episode in a single day of commuting. Fisher's podcast is almost exclusively an interview show, where he talks with a productivity author about their latest book. This podcast usually steers me to new books I'd like to read. Over the years, I've listened to a number of podcast hosts who do interviews (an inspiration for my *Genealogy Connection* podcast), but Fisher strikes me as one of the best interviewers out there.

I also recommend *The Paul Minors Podcast*. Minors is a self-employed productivity consultant living in Auckland, New Zealand, who shares a lot about how he manages his own business. His episodes run about ten-to-fifteen minutes long—a great length for short trips or during exercise or household chores. Some of his content is geared toward particular tools, such as Asana and Pipedrive, but you're sure to find a lot of other useful content even if you use different tools than the ones Minors himself uses.

Sometimes You Just Need to See It!

When we are learning something new, we often benefit from a combination of hearing and seeing. Unsurprisingly, YouTube hosts countless

videos findable using the search term *productivity*, but who can you really trust to view? I would recommend that you look for videos done by those authors (of books and blogs) and podcasters who you've already discovered and found that they provide reliable and useful advice.

Newport's YouTube channel covers a lot of the same content that he already covers in his podcast but is often broken into smaller segments so that you can watch just the content that you find helpful. He also shares videos where he has been a guest on someone else's podcast or YouTube channel.

Minors also produces videos that cover the same content as his podcasts, which is useful when he is demonstrating exactly how he uses technology tools for productivity, such as TextExpander.

Finally, you might search YouTube for videos done by noted productivity experts, including the authors interviewed by Fisher. You might even want to look for their videos before buying their books, just to see if you like their style and their content.

Planning for Continuing Education for Productivity

Professional education of all types doesn't just happen without some conscious effort to seek it out and schedule it. Your own learning style is going to dictate if you are going to look primarily for textual material (books and blogs), audio material (audiobooks and podcasts), or visual material (YouTube videos).

It might even seem like a bit of a paradox to discover that you need to organize your time in such a way as to make enough time to read, listen, and view. Build some continuing education time into your weekly schedule, both for what you need to learn about genealogical research and for what you need to learn about becoming a productive professional.

Let me know who you have discovered and enjoyed for productivity books, blogs, podcasts, and videos. I'm always looking for fresh ideas!



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The Language of Links: Decoding URLs, Part 2

by Cyndi Ingle

Broken links are links that no longer work when a user attempts to load the URL.

In the last article, we broke down URLs, domains, sub-domains, and extensions. We also illustrated how URLs move us around the web. In this article, we will talk about how URLs become links and how we can deal with broken links in our research notes and tools.

About Links

HTML (Hypertext Markup Language)

HTML is the programming language of the web. HTML code is written for a web page to allow that page to be displayed in a specific manner within a web browser such as Google Chrome, Mozilla Firefox, Safari, or Microsoft Internet Explorer or Edge.

Links (Hypertext Links)

Links are active or clickable URLs that direct your web browser to load a web page or visit a website address. Links can be either text-based or in clickable graphics. A basic text link is made up of three parts: HTML code, a URL, and text to name and describe the link. For example:

`Find A Grave`. See figure 1 for the breakdown.

Figure 1



Broken Links

Broken links are links that no longer work when a user attempts to load the URL. Links break when URLs for web pages are moved, renamed, or deleted, and when websites are reorganized with additional folders or directories inserted into the website's structure. Here is an example of a link changing because the website server and domain changed, as did the initial directory name:

OLD: `http://pixel.cs.vt.edu/library/census/link/grimes00.txt`

NEW: `http://odessa3.org/collections/census/link/grimes00.txt`

You can see that the file name and the two sub-directories just above that remained the same.

Redirects

A redirect is a URL that is set up to automatically transfer to another URL. This is often done when a website has been redesigned or rearranged. It helps direct people from old versions of websites to new versions. Here's an example:

OLD: <http://www.CyndisList.com/photos.htm>
 NEW: <https://www.CyndisList.com/photos>

Sometimes redirects are seamless because most of it happens behind the scenes; the user is unaware unless they pay attention to the URL and note the change. Sometimes the site owner will tell you when you are being redirected, giving you a chance to note the change so you can update bookmarks and links.

This example from recent updates at RootsWeb shows that a simple change—adding a *genealogy* directory in the middle of the URL—broke all links on the freepages sub-domain.

OLD: <https://freepages.rootsweb.com/~jharr/court.html>
 NEW: <https://freepages.rootsweb.com/~jharr/genealogy/court.html>

Many web browsers will allow you to view most file types within the browser itself.

File Types and File Extensions

There are many different types of files accessible via the internet. Each file type has a unique file extension that may be part of the URL. Knowing the file type will help you determine what software you will need to open, view, edit, or access the file. Many web browsers will allow you to view most file types within the browser itself. If you choose to view the file outside of the browser, another type of program will be necessary, depending on the file type. The file extension at the end of the file name will indicate the file type. Table 1 contains some common examples.

Table 1

File Type	File Extension	Program
HTML	.htm, .html	Web browser: Google Chrome, Mozilla Firefox, Safari, or Microsoft Internet Explorer or Edge
PHP	.php	Web page that might contain PHP (Hypertext Pre-processor) code, possibly resulting from a search performed on a site
ASPX	.aspx	Active Server Pages, web pages using the Microsoft ASP.NET framework, viewable in a browser
Graphics or images	.gif, .jpg, .png	Graphics or image viewer
Text	.txt, .doc	Word processing program
Compressed or encoded files	.zip, .sit, .hqx, .tar, .gz, .bin	Compression software
Audio Files	.au, .wav, .mp3, .mp4	Audio player
Video files or movies	.mov, .mpeg, .wmd, .wmv, .avi, .mp4	Video player
Portable Document Format (PDF)	.pdf	Adobe Acrobat Reader or other PDF file reader

Dynamic URLs make it hard to create bookmarks or citations to revisit the web page later.

Deep Linking and Messy URLs

Deep linking refers to digging deep within a website, several folders or sub-directories down, and linking to those pages in a document, a shortcut, or a bookmark. The benefit of deep linking is being able to get back to a specific section or web page within a website without having to retrace your steps using the site's navigation. The disadvantage to deep linking is that websites, and structures deep within a website, can change—particularly those based on an underlying database—and fluctuate over time. This creates broken links, bookmarks, and citations.

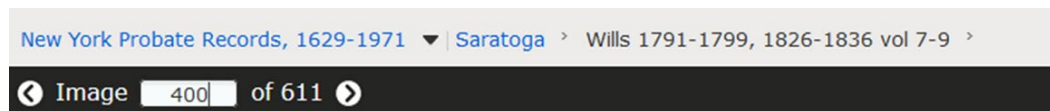
Static vs. Dynamic URLs

Some web pages have static content and static URLs that do not change. These make easy bookmarks. Some web pages are created dynamically by retrieving information from an underlying database and presenting that information in your web browser. These pages are created on the fly and can change as the underlying database changes. In these cases, some might have static URLs and others might have dynamic URLs that change as often as the data changes. Dynamic URLs make it hard to create bookmarks or citations to revisit the web page later. In that case, you need to note other identifying information to get back to the information you were viewing, such as the date, time, title of website, title of database, search parameters, search results, and so on.

Waypoints

Many websites with underlying databases, especially those that haven't been indexed and are therefore not searchable, have set up waypoints to browse within the site. This makes it easy to follow a trail of breadcrumbs to go back and forth within the database, its sub-folders, and its individual records or images. Waypoints help you navigate to a specific page or image within a database when there is no deep linking URL available to do so. In general, waypoints are distinguished with angle brackets between each section or folder. An example on FamilySearch is the database "New York Probate Records, 1629–1971" at <https://familysearch.org/search/collection/1920234> (see figure 2).

Figure 2



In this example, a static URL is available for image 400 within New York Probate Records, 1629–1971 > Saratoga > Wills 1791–1799, 1826–1836 vol 7–9. However, there is no guarantee that this URL will remain the same over time. A new program or redesign of the database structure can change this. Currently, the direct URL for image 400 is: <https://familysearch.org/ark:/61903/3:1:33SQ-GY-CD-SQ5?i=399&wc=Q7P6-4W5%3A213302501%2C214517701&cc=1920234> (or tidied up—see below—it's <https://familysearch.org/ark:/61903/3:1:33SQ-GYCD-SQ5>).

Tidying Up a URL

When copying a URL to use in a citation, in an email, or on social media, you may have noticed a lot of extraneous characters and bits of code that make for long and unwieldy URLs. These can often be cleaned up to remove unnecessary code and make them shorter. It depends on the URL and how the website is set up, but it's easy, so give it a try and see if it works for you. All websites are different, so these are general ideas to get you started.

Look for the main URL for the web page at the beginning, including a domain name, directories, and a file type. Immediately following that, look for a question mark (?), also called a *hook* in programming lingo. In general, everything following the hook is code added to the main URL to make it call up

specifics from within a website's database. You will see code bits following the hook that can sometimes be deleted from the URL without changing how the link itself works.

In this example, the bit after .html? indicates that the original referrer to this link was Facebook (?spref=fb, where *spref* is a **field** and *fb* is the **data**): <http://blog.southerngraves.net/p/cemetery-symbolism.html?spref=fb>.

This example is from a Maine news site:

http://www.mainebiz.biz/article/20160815/NEWS0101/160819973/1092?utm_source=eneews&utm_medium=Daily%2BReport&utm_campaign=Monday

The code after the hook shows *field=data* followed by an ampersand, then followed by *field=data*, followed again by *&field=data*, etc. Each of these is either a database search parameter or data added to the URL for tracking purposes, so the website owners can understand where their traffic is coming from. You can strip out everything following the hook and the link will still work while looking much cleaner and shorter. The URL now looks like this:

<http://www.mainebiz.biz/article/20160815/NEWS0101/160819973/1092>

URL Shorteners

You can also tidy up a long, unwieldy URL by using a URL shortener program. They are quick and easy to use, and they often help you track how often your shortened URLs are being used by others. Some URL shorteners are used for customizing and branding URLs for use in promotional materials and on social media.

- Bitly, bitly.com
- TinyURL, tinyurl.com
- Ow.ly URL Shortener, hootsuite.com/pages/owly
- Wikipedia—URL Shortening, en.wikipedia.org/wiki/URL_shortening

Fixing Broken and Missing Links In Citations

The strategy for fixing broken or missing links in citations is simple but involves several steps.

1. Assuming the website is still intact, but the link is broken, you can explore the URL to figure out how it might have changed. Move backward through a URL, from right to left, removing the file name, then each directory name, one at a time to see if the directory structure has changed. You might end up on a landing page for that website section, with new links to the page you are trying to locate.
2. Navigate to the front page of the website or the front page of the section you are using to determine if they have a link to the source you need. For example, on a library or archives site, navigate to the front page of the Special Collections or Local History section to locate a new link.
3. Use a frequently updated search engine like Google to locate a website at a new URL.
4. Visit other websites for related topics likely to link to your source of interest. You may find that one of those sites has an updated link.
5. Join a Facebook group for the appropriate topic, and then post a query about the missing website. Ask others if they know what happened to the site or how to contact the owner.
6. Use the “Cached” feature within the Google search engine to locate an old “snapshot” copy of the site as it appeared when Google’s bots last visited that URL. The snapshot may reveal the name and email address of the website’s owner.

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Cyndi Ingle, a genealogist for more than forty-two years, is the creator and innovator behind the award-winning and globally recognized CyndisList.com. Cyndi is an expert in using technology for genealogy, research in the United States, and bringing together traditional methodology with organization, computers, software, and the internet. She is an internationally known lecturer and has authored numerous articles and three books.

7. Use the Internet Archive Wayback Machine (archive.org/web) to look at previously archived copies of the website on earlier dates to locate the name of the owner and possible contact information.
8. Look up the contact names, information, and email addresses for a domain name registrar within a Whois database search.

More Things to Remember about URLs

- A website can be made up of one web page or several.
- One website can exist on several different web servers, all with different domain names, resulting in different URLs for each of the various pages.
- One website can exist on several different web servers, all with one domain name.
- URLs are not permanent.
- URLs are not always static.
- If you can't locate a URL, don't make any assumptions about the location of the web page that had previously been located at that URL.
 - The website/page may have been moved.
 - The website/page may have been altered.
 - The website/page may have been deleted.
 - The website/page may no longer be under the control of the original author.
- Because URLs can fluctuate and websites can disappear, be sure to always make a hard copy of the content that you plan to cite as your source. Print a copy on paper or save an electronic copy. Make note of the URL on those copies.
- Whenever possible, consider using a website only as an interim source citation until an original, permanent, offline source can be found to validate the content found on the web.

Conclusion

Understanding the language of links and decoding URLs means truly understanding all the bits and pieces and what they designate. Knowing these things will make it easier for you to fix broken bookmarks, update broken links in source citations, and locate some of your older online sources that now have new addresses.

Learn More about URLs

- **A Beginner's Guide to URLs:** ling.upenn.edu/advice/url-primer.html
- **How to Read a URL:** navigators.com/url.html
- **Web Naming and Addressing Overview: URIs, URLs, . . .:** [w3.org/Addressing](https://www.w3.org/Addressing)

Family History Conferences: A Smorgasbord of Presentations

by Angela Packer McGhie, CG, FUGA

Genealogy conferences can be enlightening as they provide presentations and workshops about a wide range of topics. Most conferences have presentations that benefit family historians from beginner to professional. They may feature instruction about genealogical records, methodologies, case studies, ethnic research, geographic locations, writing, niche topics, and more.

In the last few years, many organizations adapted to pandemic restrictions and moved to hosting virtual conferences. That benefited many genealogists who could participate from the comfort of their own homes. Local conference hosts could advertise to family historians around the world. This brought genealogy education to many more participants than ever before.

This year people are realizing how much they miss the personal interactions and networking opportunities available at conferences. While attending a conference in person, some professional genealogists spend more time in the vendor hall making connections than in sessions. They also go out to dinner to socialize and get to know associates better. Many conferences will either be hybrid or in-person events in 2023.

Networking is especially important for APG members as they need opportunities to build relationships with colleagues. This provides space for creativity, innovation, and partnerships. It also helps people build a network of colleagues who can support each other by reviewing writing pieces, referring clients to a colleague with a different specialty, and having people who understand the business and can provide guidance on common issues.

Opportunities for Professionals

Professional genealogists can look to these conferences not only for a broad general genealogy education but also specialized presentations about unusual topics. They expand their knowledge of specific subjects through advanced lectures and workshops. The APG Professional Management Conference (PMC) is unique among genealogy conferences as it focuses on the skills attendees need to succeed in business in this field. It also highlights emerging opportunities such as the presentation at the 2022 PMC about forensic genetic genealogy.

Many conferences will either be hybrid or in-person events in 2023.





Richmond, Virginia

APG members are uniquely positioned to share their knowledge with the community by speaking at conferences to help educate others seeking their ancestors. Professional genealogists spend time and money developing expertise and share it both by conducting research for clients and teaching others about the history, records, culture, methods, and techniques essential to solving tough genealogical questions. To see which conferences are looking for speakers and may have issued a call for proposals, check the Genealogical Speakers Guild at genealogicalspeakersguild.org/call-for-proposals or the Conference Keeper website at conferencekeeper.org/call-for-papers.

Upcoming Conferences

Conferences with a variety of speakers that run over several days are featured below. There are also many local conferences that run one or two days and feature either a single speaker giving multiple presentations or several speakers. Look for additional conferences on Conference Keeper at conferencekeeper.org/conferences.

APG Professional Management Conference

The APG Professional Management Conference (PMC), *How to Pivot: Genealogy in a Changing World*, was held virtually using the Whova platform on 21–24 September 2022. It featured four days of presentations about topics including business planning, client relations, interactive presentations, social media marketing, ethics, pricing, writing client reports, trademarking, and forensic genetic genealogy. Virtual social activities gave participants a chance to network and interact with other professional genealogists.

Recordings of twenty-one sessions are available for purchase on PlayBackNow at playbackapg.com/apg2201. These sessions can be purchased in a package or individually. Recordings will be accessible through 30 April 2023.

The 2023 APG PMC will be held 19–21 October 2023 in Salt Lake City, Utah, and virtually. More information will be available in the spring on the APG website.

US National Conference

National Genealogical Society 2023 Family History Conference

31 MAY–3 JUNE 2023 IN RICHMOND, VIRGINIA, AND VIRTUALLY

CONFERENCE.NSGGENEALOGY.ORG

The National Genealogical Society (NGS) conference is for family historians of all levels. In-person conference attendees can select from 110 lectures over three days. An Online at Home program will be available for those who prefer to attend virtually. APG members may be interested in the Board for Certification of Genealogists (BCG) Skillbuilding track, which features fourteen sessions by board-certified genealogists presenting case studies and advanced topics. The BCG Education Fund “Putting Skills to Work” workshops also may be of interest.

US Regional Conferences

In addition to the NGS conference, there are several large regional conferences that draw in professional genealogists. These are held in three locations across the United States:

New England Regional Genealogy Consortium

3–6 MAY 2023 IN SPRINGFIELD, MASSACHUSETTS
NERGC.ORG/2023-CONFERENCE

This in-person conference features more than one hundred presentations, a society fair, an exhibit hall, special interest group meetings, and an Ancestors Road Show where experts provide guidance on attendee's brick walls. The 2023 featured speakers are Rich Venezia and Michael D. Lacopo, DVM. The conference is held bi-annually during the odd years in various New England locations.

Ohio Genealogical Society Conference

26–29 APRIL 2023 IN SANDUSKY, OHIO
OGS.ORG/2023-CONFERENCE

An annual four-day in-person conference featuring thirty-eight well-known speakers presenting in seven tracks. There will be luncheons and dinners for socializing and an exhibit hall. The 2023 featured speakers include Cari Taplin, CG; Michael John Neill; Michael Lacopo, DVM; and Peggy Clemens Lauritzen, AG, FOGS.

Southern California Genealogical Society Jamboree

6–7 OCTOBER 2023 IN BURBANK, CALIFORNIA,
AND VIRTUALLY
GENEALOGYJAMBOREE.COM

This annual conference is moving to October in 2023. Watch the website for more information.

RootsTech

FamilySearch's RootsTech is in a class of its own, having become the largest genealogy conference in the world.

RootsTech

2–4 MARCH 2023 IN SALT LAKE CITY, UTAH,
AND VIRTUALLY
FAMILYSEARCH.ORG/ROOTSTECH/EVENT/RT2023

The 2022 virtual RootsTech event reached more than one million people in 240 countries.

With more than 1,100 presentations that ranged from five minutes to thirty minutes, participants could learn about all kinds of family history topics in a variety of languages. Many of the 2022 presentations are available in the RootsTech On-Demand library at familysearch.org/rootstech/search.

In 2023 RootsTech will return to an in-person event featuring 180 classes and an expo hall. The virtual portion will offer two hundred new on-demand sessions and a virtual expo hall.

International Conferences

Genealogy is a popular passion across the globe, so it's no surprise there are genealogy conferences held all over the world. Some offer a virtual participation option. Some rotate to various locations around the world. Here is a sampling of conferences available; genealogists can look for additional events in the areas where they research.

Czechoslovak Genealogical Society International

17–21 OCTOBER 2023 IN MILWAUKEE,
WISCONSIN, UNITED STATES
CGSI.ORG/2023-CONFERENCE/2023-CGSI-19TH-
-GENEALOGICAL/CULTURAL-CONFERENCE

Milwaukee, Wisconsin



By f1photo on Adobe Stock



Angela Packer McGhie, CG, FUGA, has a passion for teaching genealogy. She is the education director for the National Genealogical Society and a trustee for the Board for Certification of Genealogists. Angela enjoys teaching at national genealogy conferences and institutes. She was the first administrator of the ProGen Study Program and is now on its board of directors. She has served as an APG chapter president and currently serves on APG's Professional Development Committee.

This conference provides an opportunity for descendants of those from Czech and Slovak ancestral lands to meet and learn together. More than fifty sessions and ten workshops will explore the history and culture of these peoples.

The Family History Show

18 FEBRUARY 2023, VIRTUALLY
THEFAMILYHISTORYSHOW.COM/ONLINE

The Family History Show offers talks from UK speakers. Each presentation is available for seventy-two hours and participants have the option to book a free personal consultation with an expert. The virtual exhibitors offer participants the option to schedule a chat.

International Congress of Genealogical and Heraldic Sciences

This international conference is held in even years in locations around the world. The 2022 conference was in Cambridge, England, and the 2024 conference will be in Boston, Massachusetts. See details at en.wikipedia.org/wiki/International_Congress_of_Genealogical_and_Heraldic_Sciences and americanancestors.org/icghs-2024.

International German Genealogy Partnership (IGGP) Conference

9–11 JUNE 2023 IN FORT WAYNE, INDIANA, UNITED STATES, AND VIRTUALLY
IGGP.ORG

This conference is held every other year and offers three days of presentations across multiple tracks covering topics related to German ancestry. Conference attendees can visit the Genealogy Center at the Allen County Public Library while in Fort Wayne.

Other international family history organizations hold conferences but as of this writing the following have not yet announced the details for future conferences.

AFFHO Australasian Family History Congress

NORFOLK ISLAND, AUSTRALIA
AFFHO.ORG

Family History Down Under

CASTLE HILLS, NEW SOUTH WALES, AUSTRALIA
FAMILYHISTORYDOWNUNDER.COM

Ontario Ancestors Conference

ONTARIO, CANADA (VIRTUALLY)
CONFERENCE2023.OGS.ON.CA

Specialized Conferences

There are also conferences focusing on specific areas in our field.

East Coast Genetic Genealogy Conference

6–8 OCTOBER 2023 IN LINTHICUM, MARYLAND, AND VIRTUALLY
ECGGC.ORG

This conference features presentations about a variety of genetic genealogy topics. All sessions are recorded and available to in-person and virtual attendees.

Institute for Genetic Genealogy (i4GG) Conference

11–12 MARCH 2023 IN SAN DIEGO, CALIFORNIA, AND VIRTUALLY
I4GG.ORG

Two days of presentations are given by genetic genealogy experts. All attendees will have unlimited access to recorded presentations.

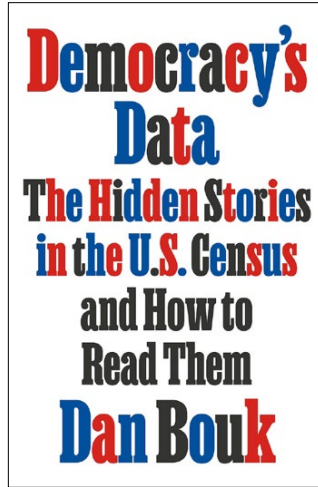
Ramapo College Investigative Genetic Genealogy Conference

28–30 JUNE 2023 IN MAHWAH, NEW JERSEY
RAMAPO.EDU/IGG/CONFERENCE

This is the first conference dedicated exclusively to investigative genetic genealogy. Watch the website for forthcoming details.

Summation

With all of these conference options, many of them with virtual participation, there is sure to be content that will help you develop expertise and propel your career forward. Think about your education plan and what you need to learn, then add conferences to your 2023 schedule accordingly.



Democracy's Data: The Hidden Stories in the U.S. Census and How to Read Them

By Dan Bouk. MCD, New York, 2022. ISBN: 978-0-374-60254-3. 384 pages, index, endnotes, illustrations. Hardcover, \$25.49; paperback, \$20.00; Kindle, \$14.99.

Review by Gena Philibert-Ortega, MA

What do you know about the US census? I realize that for those conducting US genealogical research, the census is one of those resources you cut your teeth on as you learn how to research. But what do you really know about it?

As genealogists, we often look only at the recorded information and what it reveals about our ancestors, but the book *Democracy's Data: The Hidden Stories in the U.S. Census and How to Read Them* encourages the researcher to go beyond the documentation of a name and study the document and its history.

Author Dan Bouk, a data historian, explores the 1940 US census in a way that will make you realize how little you know about the census and wonder what you've been missing in your research. Although the author mentions his family history, he is writing this for non-genealogists as part

of his interest in “the history of bureaucracies[.]” Even so, this book can assist the genealogist in doing better census analyses.

The cover fly leaf explains that the book “teaches us to read between the lines.” This is a simplification of what Bouk does. He shows us that the census reveals much more than we think it does by using history, social history, and data analysis. Only when you study the reason behind the record can you really know how to understand it.

Each chapter after the introduction focuses on an aspect of the census. The introduction explains how he tackled this research:

I did not stop at the [census] form itself. I looked at the later transformations of the data as it mutated and proliferated in reports and official statistics. And I dug into my personal archives from old photographs and notes from interviewing my grandparents. I interpreted what I discovered using what I knew about American history and what I learned from the official archives of the Census Bureau . . . It requires careful observation; thoughtful, curious questioning; and creative but also cautious interpretation—in short, it requires the modes of inquiry that lie at the heart of the humanities and social sciences. (p. 13)

The author discusses what the census gathers—such as genealogically relevant information like names and places—and delves into aspects we may not have considered, such as why specific questions were asked. Chapter 1 begins with an explanation of who wrote the questions for the 1940 census. It may seem obvious that the census bureau or government employees were involved, but there were others, including a vice president

of Metropolitan Life Insurance and the chairman of Sears, Roebuck, and Co. Their motivations and interests influenced the questions our ancestors answered. This helps the researcher understand the census beyond just ancestral answers.

Chapters explore information in various census columns, such as the name column and the relationship to the head of the household. Columns we may skip over, such as race, are looked at in detail, and explanations over who was “white” and who wasn’t and why will help you to understand why the information in those columns could be incorrect. Bouk looks at what the “silences” in the census can mean and how white supremacy and eugenics played a part, with the most obvious example being the 1940 census information used to identify and incarcerate Japanese Americans during World War II.

One of the most interesting things I learned while reading this work focused on finances and the census. It makes sense that our families may have been reticent to disclose their finances to a stranger (or even an enumerator they knew). Bouk emphasizes the need for analysis as he points out why some of those enumerated are listed as employed but reported making no income. He found cases where person after person claimed no income and explains why. Once I read this chapter, I looked at the 1940 census carefully to identify other examples.

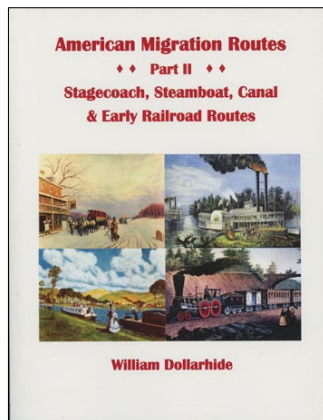
Although Bouk is an academic, the book includes images that help the reader “see” what he is explaining. Census pages at the end of each chapter illustrate and summarize the main points and are beneficial even for those familiar with the census.

Bouk’s study looks beyond the census sheet itself and delves into archival records. Those who study census history will notice that Bouk acknowledges and refers to Margo J. Anderson, the author of *The American Census: A Social History*.

In my opinion, Bouk's book is a continuation of Anderson's work. The only problem, though understandable, is that despite the promise of the title to learn more about the "US census," he only explores the 1940 enumeration.

Genealogists should read *Democracy's Data*. I felt the book was essential in my continuing education of the 1940 US census. Bouk declares, "There are stories in the data. You just have to know how to read them" (p. 3). I think too often we

don't explore what records are revealing before searching for a name. This book provides good instruction on in-depth research into a record. Using this methodology, we can take a fresh look at other familiar records.



American Migration Routes Part II: Stagecoach, Steamboat, Canal & Early Railroad Routes

By William Dollarhide. Family Roots Publishing, Orting, WA, 2022. ISBN 978-1-62859-337-2. 157 pages, bibliography, maps, photographs, tables. Paperback, \$39.15; PDF, \$27.39.

Review by Amber Oldenburg

William Dollarhide is back with *American Migration Routes Part II: Stagecoach, Steamboat, Canal & Early Railroad Routes*. The inspiration for this second volume stems from the travel routes outlined in the 1840 book *The American Traveller; or Guide Through the United States* (6th edition) by Henry S. Tanner. Although Tanner's work is accessible via the Internet Archive (archive.org), Dollarhide felt that clear and readable maps were necessary because the maps in Tanner's book were "barely readable."

In keeping with Tanner's book, Dollarhide focuses on forty-five major American cities that served as transportation hubs in 1840, stretching north to Portland, Maine, west to Little Rock, Arkansas, and as far south as Tallahassee, Florida. This new book contains ninety maps and 314 Google Map Road Trips. Each of the forty-five cities is represented by two maps: a contemporary highway map and a county boundary map on which the route has been highlighted.

American Migration Routes Part II begins with a foreword written by the publisher, Leland K. Meitzler. This is the same foreword that appeared in the first volume, which is beneficial if the reader has access to only one of the books. However, a reader is likely to buy and/or read both volumes, so this may seem redundant to the reader.

In the introduction readers will find a succinct explanation of the book's purpose and how family historians can utilize it. The introduction also includes a map highlighting the forty-five cities mentioned throughout the book, as well as a brief outline of US borders as they were in 1840. Following the introduction is a bibliography and study guide. It is very similar to the one found in the first volume, but does have some additions. This is followed by a table of migration routes for each of the modes of transportation described in the book: US turnpikes and stagecoach routes, steamboat routes, canals and waterways, and early train routes. These tables include directions and mileage for a modern road trip, the page numbers

where the maps may be viewed, and notes with links to historical references.

Dollarhide has also included detailed travel routes along with a link to a Google Map that allows the modern-day traveler to follow the exact route as closely as possible. The ability to click on a link, go right to the map, and then have the directions delivered to one's phone makes this a tremendous addition, especially for those who purchase the digital version of the book. However, since URLs are not provided in the print version of the book, the reader will not be able to access the maps, thus making one of the key features of the book obsolete.

Additional historical information about the locations along the various paths is scattered throughout the book. The popular nineteenth-century vacation spot of Warm Springs, North Carolina, for instance, is described on page 92. Although they are few and far between, these historical accounts are an interesting and enjoyable addition to the book. More of these descriptions throughout the text would have been a welcome addition.

Dollarhide has once again created a collection of maps that will help people learn more about the migration routes their ancestors might have traveled, as well as assist the reader in retracing their ancestors' steps. This map collection is an essential component of every genealogist's reference collection. If you want to access the Google road trip maps, I strongly recommend purchasing the book in digital format.



Michelle Taylor
Virginia, USA

Lois Abromitis Mackin
Minnesota, USA

Laurence Abensur-Hazan
Paris, France

Nancy E. Loe
California, USA

Andre Bagley
Utah, USA

Jane Harris
Inverness, Scotland

Kelli Bergheimer
Ohio, USA

Leslie Carney
Arizona, USA

I Am APG

Getting to Know **Linda Yip**

What's your name?

Linda Yip (葉秀映)

What are your preferred pronouns? (e.g., he/him/his, she/her/hers, they/ them/theirs, etc.)

She/her/hers

Where were you born?

Vancouver, British Columbia, Canada

How big was your family? (Parents, siblings, cousins, etc.)

This is a tough question to answer. In a sense, my family has been both big and small. Growing up, we socialized with my mother's smaller side. I was in my thirties before I got to know my father's bigger side. My extended family numbers in the thousands, with seven generations of family across North America and beyond.

Where did you go to school?

You might ask where I didn't go to school. I attended high school in Burnaby, British Columbia, then trade school in Vancouver. I earned my commercial printer's certification in Calgary, Alberta. Later I studied at both Acadia University in Wolfville, Nova Scotia, and Bridgewater College in Bridgewater, Massachusetts, graduating with a business degree. I take courses and webinars throughout the year and I'm currently pursuing accreditation

with the International Commission for the Accreditation of Professional Genealogists.

How did you get started in genealogy?

Used bookstores. My Yip (葉) family has deep roots in Canada, but in the 1990s there were few available sources. I haunted the Canadiana sections of used bookstores and read book indexes. If a book mentioned a Chinese name I recognized, I bought it. It was like hunting for treasure.

What has been your biggest or most surprising discovery about an ancestor or ancestors?

Family stories are often exaggerated. Research suggests that my great-grandfather, Yip Sang (葉生, also 葉春田), was exceptional. He exceeded the stories told about him:

- "He owned a building." He owned dozens of properties.
- "He was an advocate." After the 1907 race riots, he spoke on behalf of the Chinese community before a hostile royal commission.
- "He supported education." For his family and community, he established a school in his house. In 1909, he donated \$2,500 (equal to about \$78,000 in 2022) to help build the Toisan No. 1 Middle



[High] School near his ancestral home. The second-floor hall is named for him.

I can't wait to discover more.

What is your favorite research resource?

The internet. It has transformed genealogy and made the impossible possible. I am deeply grateful for technology and the digitization of sources. Thanks to resources from Ancestry, The Drs. Wallace and Madeline Chung Collection at the University of British Columbia (chung.library.ubc.ca), FamilySearch, the Library and Archives Canada (library-archives.canada.ca), My China Roots (mychinaroots.com), and Facebook groups, it is now possible to research difficult and obscure genealogies.

What is your job as a professional genealogist like?

Varied. I'm self-employed. I love to work on projects that make a difference in the



The Yip Sang family, Vancouver, British Columbia, abt. 1916

community and push the bounds of our collective understanding. I'm currently an advisor for two documentaries and one exhibition and have speaking engagements booked for the next eight months. An earlier project involved advising a large Chinese family wanting a shared online tree. It was more coaching than researching, but such fun to lead the project to a successful conclusion. Another documentary, *Finding Fred Lee*, was released worldwide on 11 November 2022 (chinesecanadianmuseum.ca/program/finding-fred-lee-community-film-preview). It was a proud moment to be a part of that team and see the film.

How did you decide to go from hobbyist to professional?

My first client found me through my blog and persuaded me to take what I'll call *The Case of the Disappearing Grandfather*. He led us on a wild chase for fifteen months through eight jurisdictions in two countries. We discovered beauty, secrets, and tragedy. You never forget your first case. I'd tell you, but I think this story merits a book.

What is the most challenging thing for you as a professional genealogist?

Once I get going, it is hard to stop. In Chinese genealogy, it can take extreme

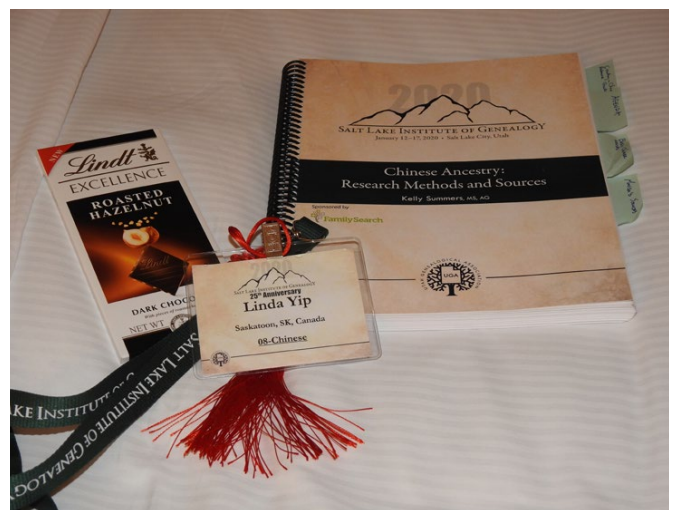
effort to learn the correct surname, so how can I stop once I've finally found the starting gate?

What do you love most about being a professional genealogist?

For any genealogy of underrepresented populations, there's room for aspiring family historians to make a difference.

Did or do you have any mentors (genealogy/business or otherwise)?

Yes. I cannot overemphasize how important mentors have been in my journey. Before my more formal journey with accreditation, there have been trailblazers in other fields, such as art, education,



Top: Toisan No. 1 Middle [High] School (台山市第一中学), Jiangmen, China. October 2019
 Bottom: School room at Wing Sang, the Yip family complex in Vancouver, British Columbia, 2008

Top: The author and Gerald H. Smith, at the Salt Lake Institute of Genealogy (SLIG) in Salt Lake City, Utah, January 2020
 Bottom: SLIG memories, Salt Lake City, Utah, January 2020

and history. One life-changing experience was joining Drs. Selia Tan and Henry Yu and the Heritage of Cantonese Migration Tour on a trip to Sze Yup (四邑), Guangdong, China. Every genealogist needs to visit the land of their forebears: the perspectives gained are invaluable, both personally and professionally.

What's your best habit?

Recognizing when I need help and then asking for it.

What's your worst habit?

Forgetting to eat.

What advice would you like to give others that you hope they will appreciate?

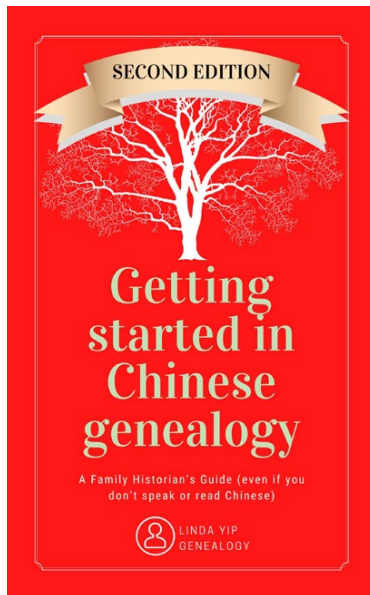
Don't be afraid of public speaking. The world needs more speakers. The only way to get over the nerves is to say yes to everything. I joke that I'll speak at the opening of a door. It is wonderfully fulfilling to hold an audience's rapt attention—the exact opposite of your family's eyes glazing over when you mention your latest research!

Do you have a favorite object in your workspace?

My husband signed up for a monthly floral delivery. I love having the bright burst of color on my desk, visible in every online meeting.

What is your proudest achievement?

Realizing that my perceived weakness could be my strength. My book *Getting Started in Chinese Genealogy: A Family Historian's Guide Even if You Don't Speak or Read Chinese* is written for everyone curious about Chinese genealogy but



Cover of “Getting Started in Chinese Genealogy”



Dr. Henry Yu and Dr. Selia Tan, Cangdong Village, Kaiping, Guangdong, China, October 2019

daunted by the language. This is the book I wish I had when I began because I was ashamed of my linguistic abilities. I much prefer to learn Chinese by doing, and I think that resonates with a lot of my readers. (You can purchase a copy here: past-presence.com/product/getting-started-in-chinese-genealogy-second-edition.)

Is there a book (of any type) that you recommend to everyone?

What Happened to You? by Oprah Winfrey and Bruce D. Perry made me a better genealogist (and human being) by reframing my understanding of trauma. As family historians, we research records that tell one part of the story. Building theories informed by traumatic events helps us understand another part of the story.

Do you have any favorite podcasts?

I rarely have time for podcasts now that I don't commute to work. But when I'm on road trips, these are my favorites:

- *Research Like a Pro* by Diana Elder and Nicole Dyer
- *This American Life* by Ira Glass
- *Serial* by the team at This American Life

Are there any blogs or websites you visit regularly?

I used to tell my husband I was going to the library to use Ancestry. “How long are you going,” he'd ask. “Until they kick me out,” I'd say. When Newspapers.com had a free trial weekend, I went on a marathon to pull more than three hundred articles. Today, I'm fortunate to have access to all of Ancestry's products as a member of the Canadian advisory board.

Do you have any favorite webinars or online classes that you've taken?

A major benefit to genealogy society memberships is access to collective, local knowledge. I am a member of multiple societies in Canada and the United States, filling the free spots in my calendar with webinars by a wide range of amateurs and professionals. One Ontario APG webinar still guides me today: Dr. Wilson's “Genealogy and the Law (Canada).”

Tell us anything about yourself that you would like to promote (your website, blog, articles, books, upcoming appearances, etc.)

On 1 July 2023, the new Chinese Canadian Museum ([chinesecanadianmuseum](https://chinesecanadianmuseum.ca)

.ca) will open in the Wing Sang complex at 51–69 East Pender Street, Vancouver, originally built by my great-grandfather Yip Sang. As a passionate genealogist and descendant, it is my honor and privilege to support the museum with advice, family connections, photographs, and research. The opening exhibition, *The Paper Trail to the 1923 Chinese Exclusion Act* (1923-chinese-exclusion.ca), will showcase original records collected from families worldwide that together tell an impactful story of documentation and survival. It's an exciting time to be a genealogist.

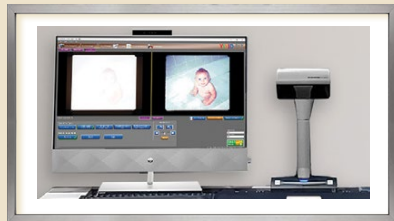
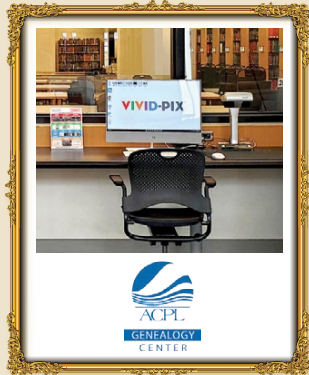
Is there anything else you'd like to tell us about?

Genealogy and blogging go together like ice cream and cake. My blog, past-presence.com, is in its sixth year, with more than one hundred fifty posts and forty-seven pages. I first conceived of it as a collection of research links and have since built it into a resource. Whether you're looking to build your market or exploring a tricky methodology, a blog is a natural vehicle for both. Writing for the public keeps me honest. Is this true? Can I verify it? What should the citation say? It's great practice for a professional.

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