Getting the Most from Case Studies in the *National Genealogical Society Quarterly*

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Barrier-breaking solutions often appear as case studies in the *National Genealogical Society Quarterly (NGSQ)*. These articles are complicated because solutions to longstanding problems are complicated. Some readers may view them as jumbles of densely packed sentences, complex tables, intrusive footnote numbers, and page-wasting footnotes. Others easily interpret those explanations of complicated research findings. Two understandings help them do this:

- Even when not mentioning the readers' ancestors, research-based articles teach about genealogical sources and methods that readers can use to identify unknown ancestors.
- Conventions for presenting research results help readers understand the lessons that case studies teach.

Why Read *NGSQ* Case Studies?

Each *NGSQ* issue presents three to five case studies explaining solutions to difficult genealogical problems. These articles aim to benefit present and future readers in four ways:

1. They make a record of a family's previously undocumented identities, relationships, and events.
2. They "tell the story" of evidence-based reasoning underlying those conclusions.
3. They teach about the methods and sources the author used to establish each conclusion.
4. They demonstrate that the author's reasoning and conclusions are correct.

Case studies achieve these goals by applying a standard format for humanities-style research articles.[1] This format includes (1) pages telling a story and laying out its documentation, (2) numbers connecting a segment of narrative with a footnote, and (3) tables and other enhancements to the narrative. These features

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1. For guidelines to this format, see *The Chicago Manual of Style*, 16th ed. (Chicago: University of Chicago Press, 2010), 655–65.

help authors achieve the four goals listed above. Furthermore, they help readers follow the author's reasoning, enabling optimal learning from the article. Readers learn the most when they understand what conventional formatting features show and how they work.

Page Layout

As figure 1 shows, each page of an *NGSQ* article has two physically separate parts that work together:

- The pages' top sections form a linear narrative beginning with an introduction and ending with a conclusion.

- Supporting the narrative, the pages' bottom portions present footnotes numbered sequentially from the first to the last. The footnotes contain citations to the author's sources, comments about the sources, and—just occasionally—supplementary information.

The Pages' Top Portions: A Story

A case-study's narrative has three major divisions:

- *The beginning.* The author opens the article by laying out a genealogical problem or question, which provides a focus for the entire essay. See table 1 on page 49 for examples. This division

Top of page, with narrative facts and explanations

Line separating the page's two parts

A footnote number, connecting the page's two parts

Bottom of page with documentation of facts and explanations

The Case of George Wellington Edison Jr. 143

and raised here. He is a son of Dr. Edison, and has been a practical electrician for years. He had charge of the electrical work in the Illinois building at the world's fair.[88]

George justified striking for higher wages:

It takes four years' apprenticeship to become an ordinary electrical worker. The danger[s] besetting the man who climbs poles and works among the labyrinth of deadly wires are well known. Horrible deaths are common in our city. . . . It only takes 1100 volts to lawfully execute a man in New York, but men in our craft almost daily work among wires bearing many times this force. Some wires in the city carry 4,000 volts. Three dollars a day is none too much for the man who carries his life at his fingers' tips.[89]

On 16 September 1901, while living in St. Louis, George and Ida returned to Montgomery County, Illinois, to remarry.[90] Perhaps they believed George's falsifications in 1887 had rendered that marriage invalid. Except for their ages and perhaps George's occupation and residence, their 1901 information reflects their status in 1887, when Ida married "George Emberson Floyd":

- The bride was "Miss Ida C. Hall," age twenty-nine, resident of Litchfield, Illinois, born in Boone County, Arkansas, to Oliver and Talitha (Holmsey) Hall.
- The groom was George W. Edison Jr., thirty-nine, an electrician residing in Chicago, born in Quincy, Illinois, to George W. and Mary (Harris) Edison.
- The marriage was the bride's first and the groom's second.[91]

A family record says George Edison and Ida Hall married on 16 September 1887.[92] The entry combines the month and day of their 1901 wedding with the year of their "Floyd"-Hall nuptials.

Excepting 1906, when George resided in Quincy at his mother's address, he and Ida remained in St. Louis through 1908, while he worked as an electrician.[93] In 1910 George—still an electrician—lived with Ida and their children in

88. "A Former Quincy Boy," *Quincy Morning Whig*, 10 August 1898, page 8, col. 3.
89. "Electrical Strike is On," *Post-Dispatch*, 31 July 1898, page 14, col. 6.
90. Montgomery Co., marriage file 13195, Marriage License [return], Edison-Hall, 16 September 1901. The marriage is recorded in Montgomery Co., Marriage Register A:235; County Clerk's Office. For the couple's St. Louis residence, see *Gould's St. Louis Directory* (1901), 557.
91. Montgomery Co., marriage file 13195, Marriage License: Adult, Edison-Hall, 16 September 1901, signed by George W. Edison Jr., Ida C. Edison, and clergyman Edward H. Suggs.
92. "Family Record," handwritten entries on a printed form, likely 1920 or later.
93. *Quincy, Ill., and Adams County Directory* (Quincy, Ill., R. E. Hackman, 1906), 241. Also, *Gould's St. Louis Directory* (1898), 489; (1900), 530; (1901), 557; (1902), 582; (1903), 544; (1905), 546; (1907), 506; and (1908), 514. No George Edison appears alphabetically in 1896–97, 1906, and 1909–12.

Figure 1. Main parts of an NGSQ *article's page and their connections. The page is a graphic image from Thomas W. Jones, "Misleading Records Debunked: The Surprising Case of George Wellington Edison Jr.,"* NGSQ *100 (June 2012): 145.*

"Calista Jane Greenfield knew neither her parents' names nor her birthplace."

"During her lifetime Sophie named two women as her mother. . . . Who gave birth to Sophie?"

"Despite uncertain beginnings, records reveal a Newman family's early lives."

"Absent a birth record for [the] Edwin who died in 1897, who were his parents?"

"John said he had a son but did not name him."

Table 1. Sample problem statements or questions from recent NGSQ *articles. Sources:* NGSQ *103 (June 2015), for, respectively, Thomas W. Jones, "Too Few Sources to Solve a Family Mystery: Some Greenfields in Central and Western, New York," p. 85; Melissa A. Johnson, "Mothers of Sophie (Kanetski) Howe of Scranton, Pennsylvania," pp. 105–6; Michael Hait, "Free and Enslaved: John and Melinda Human/Newman of Talbot County and Baltimore, Maryland," p. 115; Allen R. Peterson, "Family Members Missing from Derbyshire Censuses Help Identify Edwin Thorpe's Parents and Original Name," p. 130; and Rachal Mills Lennon, "Identifying a Son for John Temple of Virginia, Georgia, South Carolina, and Alabama," p. 139.*

discusses the problem and its background or context, including prior research and any research issues (missing or scarce records, for example). This opening may range from a paragraph to a few pages. It can—but might not—mention the problem's solution.

- *The middle*. Building on the narrative's beginning, the author unfolds new research findings and explains how they fit together. Other explanations include descriptions of hidden evidence and resolutions of conflicting evidence. Bulleted and numbered lists itemize points of support, analysis, and explanation. Authors arrange their article's middle division into a series of sections, several paragraphs in length. Each section has a title stating its focus, and each section builds on the one above. Authors subdivide some sections into titled subsections. This middle division, the article's longest, sequentially connects the article's main question, stated in the beginning, with its answer, stated near the end. All the middle-division's sections help show why that answer is credible.

- *The end*. A case study's conclusion, its shortest division, states or restates the solution to the problem presented in the article's beginning. The section also may summarize the author's findings and methods. Words like *appear to be* and *probably* in this section reflect caution about a conclusion's finality, not doubt about its accuracy based on the cited evidence.

The Pages' Bottom Portions: Another Story

Telling the story of an author's documentation, citations appear in numbered footnotes at the bottom of most pages. Written and punctuated like sentences, citations begin with a capital letter, capitalize proper names and titles, use commas and other internal punctuation to group information, and end with a period. Besides citations, footnotes may contain sentences supplementing the citations.

Authors' citations describe their sources. Along with the case study's narrative, citations show readers that the author's statements and conclusions rely on credible sources and on information from credible informants. Citations do this by answering five questions about a source:[2]

1. *Who created the source?* The citation's answer usually is the name of a governmental or religious organization, an author or informant, or another entity that created a record.

2. *What is the source?* The citation gives the source's title, if it has one; if not, the citation tells what the source is.

3. *When was the source created?* If the source is published offline, the citation gives its copyright date; if it is published online, its copyright year, a revision date, or the author's viewing date;

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2. Board for Certification of Genealogists, "[Standard] 5: Citation Elements," *Genealogy Standards* (Nashville, Tenn.: Ancestry, 2014), 7.

and if the source is unpublished, the event date, recording date, or both.

4. *Where <u>within</u> the source?* The citation gives a page or image number, waypoint, or other identifier, or it describes where to find the relevant information item.

5. *Where <u>is</u> the source?* If the source is published offline, the citation names the source's publisher and location; if published online, a URL; and if unpublished, the source's repository and location.

The five questions' answers show what each source is, how it supports an author's statement, and why that support is credible. See figure 2 below for a dissected citation to an online source.

When authors cite a source the first time, they cite it in full. If they cite that source again, they use a shortcut:

• If two consecutive footnotes would cite the same source, and the first footnote contains only one citation, the author uses the word *Ibid.* in the second footnote to replace information that the second citation would duplicate. See table 2 for an example.

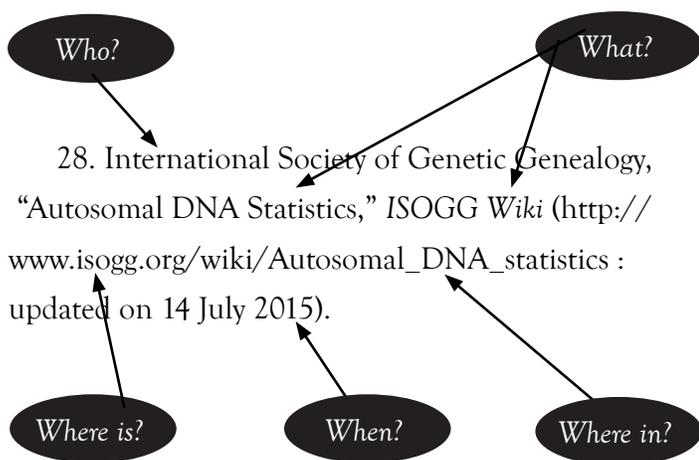• When citing a source after the first time, authors shorten the citation. They omit or

Figure 2. Citation to an online source showing how it answers five questions about the source. Explanation: The International Society of Genetic Genealogy created the source "Autosomal DNA Statistics," a titled article and web page. That source is part of the publication titled ISOGG Wiki, *a website. The source can be found at the cited URL. The citation shows that the source is an authored narrative and was recently updated.*

19. 1830 U.S. census, Cayuga Co., N.Y., Town of Aurelius, p. 173, Nathaniel Greenfield household.

20. Ibid., Town of Locke, p. 236, Stephen Greenfield household.

Table 2. Example of ibid. *Explanation: In footnote 20 the word* Ibid. *replaces and refers to* 1830 U.S. census, Cayuga Co., N.Y., *in footnote 19.*

shorten answers to the five citation questions, but they may provide new specifics. The omissions signal that the author has already cited the source in full, the retained details give readers enough information to recognize the prior full citation, and the specifics refer to information within the source. See table 3 on page 51 for examples.

Footnote Numbers

Numbers connect an author's statements to sources documenting those statements. Authors usually place these numbers at the ends of sentences, bullet points, and paragraphs in a page's top portion. Each number refers to a same-numbered footnote in the same page's bottom portion. Readers use the numbers to see which footnote documents each statement and fact in the narrative.

Authors generally place footnote numbers after words that a same-numbered footnote documents. When a statement requiring documentation appears between two note numbers, the second of the two footnotes corresponding to those numbers contains the documentation. See figure 1 on page 48 for examples.

Enhancements

Illustrations and arrangements of words into columns or tables sometimes communicate more clearly than prose. For this reason authors often add enhancements to their narrative:

• Tables show information relationships in two dimensions—vertically in the table's columns and horizontally across its rows. Table titles usually describe the contents of the table's cells

Maps, plats, and floor plans show spatial relationships.
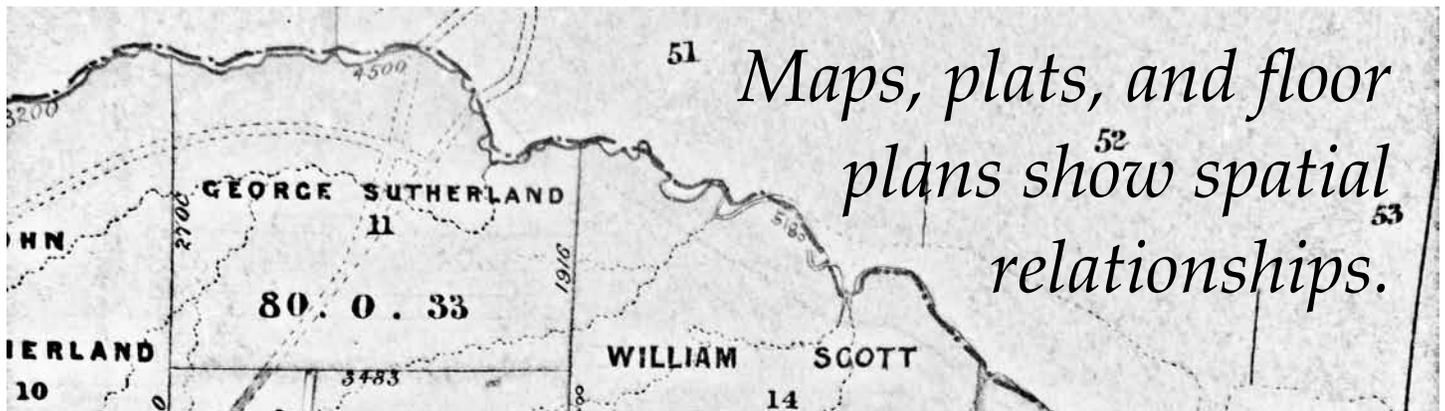
(the areas where columns and rows cross). Reading a table both across its rows and down its columns increases understanding of the table's data and how it supports the author's argument. For an example, see figure 3 on page 52.

- Timelines are chronological lists. They may show events in a person's life, creation dates of related sources, dates that various evidence items suggest for an event, or other time-based sequences. See figure 4 on page 53.
- Maps, plats, and floor plans show spatial relationships.
- Charts show familial relationships. Vertical lines connect generations, and horizontal brackets group siblings under their parents. Footnotes explain any symbols—for example,

that an equal sign signifies a marriage. See figure 5 on page 53.

Enhancements are self-contained units with frames separating them from the narrative. Each is titled, and most contain their own documentation. Preventing confusion between a narrative's documentation and its enhancements' documentation, tables and figures use lowercase letters, not numbers, for footnotes.

An article's enhancements are labeled as figures (enhancements containing a graphic image) and tables (enhancements containing only text and lines). Authors number enhancements in order of appearance, but they number figures separately from tables. For

1. David H. Burr, *An Atlas of the State of New York* (New York: privately published, 1829), map 40.

2. "Table 1: New York State Census; Preserved and Lost Records," in *New York Family History Research Guide and Gazetteer* (New York: New York Genealogical and Biographical Society, 2014), 36.

3. "GEDmatch.Com Autosomal Comparison," on-request reports, *GEDmatch: Tools for DNA and Genealogy Research* (v2.gedmatch.com), "one-to-one" comparisons among kits F202780, F299963, M201030, and M115137.

4. Herkimer Co., N.Y., estate papers, file 02871, James Greenfield, 1813; digital images, *FamilySearch*, New York, Probate Records, 1629–1971 > Herkimer > Estate papers 1796–1813 G, no 2869–2905 > images 22–29.

11. Burr, *Atlas of the State of New York*, map 40.

22. "Vital Records," in *New York Family History Research Guide and Gazetteer*, 17.

33. "GEDmatch.Com Autosomal Comparison," *GEDmatch*, kits F202780, F299963, M201030, and M115137.

44. Herkimer Co., estate papers, file 02871, James Greenfield, 1813.

Table 3. Examples of full citations and corresponding short citations.

example, table 2 follows table 1, and figure 2 follows figure 1, but *figure* 1 might follow *table* 3.

Where an enhancement is relevant to a statement or section of the article, authors insert a call-out, like "See figure 3." The table or figure appears after its call-out, but usually not immediately. Readers who turn to the enhancement when it is mentioned, instead of studying it when they come to it, more easily understand the enhancement's contribution to the case study.

Reading an *NGSQ* Case Study

Readers have four sequencing options for absorbing a case study:

1. Read only the narrative. This approach bypasses the documentation. Readers taking this approach miss the support for the author's conclusions and opportunities for learning about useful sources.
2. Read the narrative first and then the footnotes. Readers taking this approach learn about sources, but they may miss connections between the author's statements and the supporting documentation.
3. Read the footnotes first and then the narrative. Readers taking this approach learn about sources and see the qualities of the author's supporting material, but they may miss the connections between specific statements and their documentation.

Table 1

George Wellington Edison Jr. in Federal Censuses

YEAR AND PLACE	NAME	BIRTH YEAR AND PLACE	FATHER'S BIRTHPLACE	MOTHER'S BIRTHPLACE
1870 Quincy, Illinois	George W. Eddison	1860–61 Illinois	Canada	Ohio[a]
1880 Quincy, Illinois	George Edison	1860–61 Illinois	Canada	Ohio[b]
1900 St. Louis, Missouri	George W[.] Edison	Nov 1861 Missouri	Missouri	Missouri[c]
1910 Springfield, Missouri	George W. Eddison	1864–65 Illinois	Kansas	Kansas[d]
1920 Evansville, Indiana	Edwin Wellman	1859–60 Ohio	Ohio	Ohio[e]
1930 Decatur, Illinois	Edwin Edison	1860–61 Illinois	~~Scotch~~ English Canada	Ohio[f]

a. 1870 U.S. census, Adams Co., Ill., Quincy, ward 5, p. 27, dwelling 196, family 218; National Archives and Records Administration (NARA) microfilm publication M593, roll 187.

b. 1880 U.S. census, Adams Co., Ill., pop. sch., Quincy, enumeration district (ED) 31, p. 14, dwell./fam. 131; NARA microfilm T9, roll 175.

c. 1900 U.S. census, St. Louis Co., Mo., pop. sch., City of St. Louis, ED 412, sheet 7B, dwell. 123, fam. 140; NARA microfilm T623, roll 901.

d. 1910 U.S census, Greene Co., Mo., pop. sch., Springfield City, ward 6, ED 37, sheet 10B, dwell. 208, fam. 229; NARA microfilm T624, roll 782.

e. 1920 U.S. census, Vanderburg Co., Ind., pop. sch., Evansville, ED 127, sheet 14A, dwell. 283, fam. 331; NARA microfilm T625, roll 471.

f. 1930 U.S. census, Macon Co., Ill., pop. sch., Decatur, ED 58-5, sheet 8B, dwell. 149, fam. 219; NARA microfilm T626, roll 537.

Figure 3. Example of a table. Graphic image from Jones, "Misleading Records Debunked, 150.

July 1827	James McLain was born in Knox County, Ohio.[36] His parents were David and Mary (née Severe) McLain.[37]
15 March 1845	James married Phebe Wright in Knox County.[38]
15 September 1845	Phebe left James.[39]
about 8 January 1846	Their daughter Sarah McLain was born in Knox County.[40]
8 August 1846	Claiming desertion and adultery, James filed for divorce.[41]
10 June 1847	After two continuances, the Knox County Court of Common Pleas dismissed the McLains' divorce suit.[42]
1849–52	Reconciled, James and Phebe had a son, David R. McLain, born in Michigan.[43]
1851–52	James moved to Michigan, presumably from Ohio.[44]
1852–53	Their apparent daughter Catherine McLain was born in Michigan.[45]

Figure 4. Part of a timeline. Graphic image from Thomas W. Jones, "The Three Identities of Charles D. McLain of Muskegon, Michigan." NGSQ 96 (June 2008): 109. To conserve space, this illustration omits the footnotes.

4. Read back and forth between the narrative segments and the accompanying footnotes. Inexperienced readers have difficulty reading a segment of narrative, then its documentation, then more narrative, and so on. Reading this way requires practice to stay with the author's narrative thread. Once mastered, however, a back-and-forth approach is the most efficient and beneficial way to learn from a case study.

Besides reading (or re-reading) an article, marking it up increases understanding. This is especially true for complex case studies. Making marginal notes, underlining or highlighting meaningful text, and charting relationships leads to more learning than comes from just reading a complex essay.

Conclusion

One author's article helps many genealogists solve research problems. *NGSQ*, with its emphasis on methodology across broad geographic and chronological scopes, is a natural venue for researchers to share their results and methods. With its emphasis on teaching, *NGSQ* also is a natural venue for family

historians to expand their knowledge of sources and their skills at genealogical research, reasoning, and writing. 🌳

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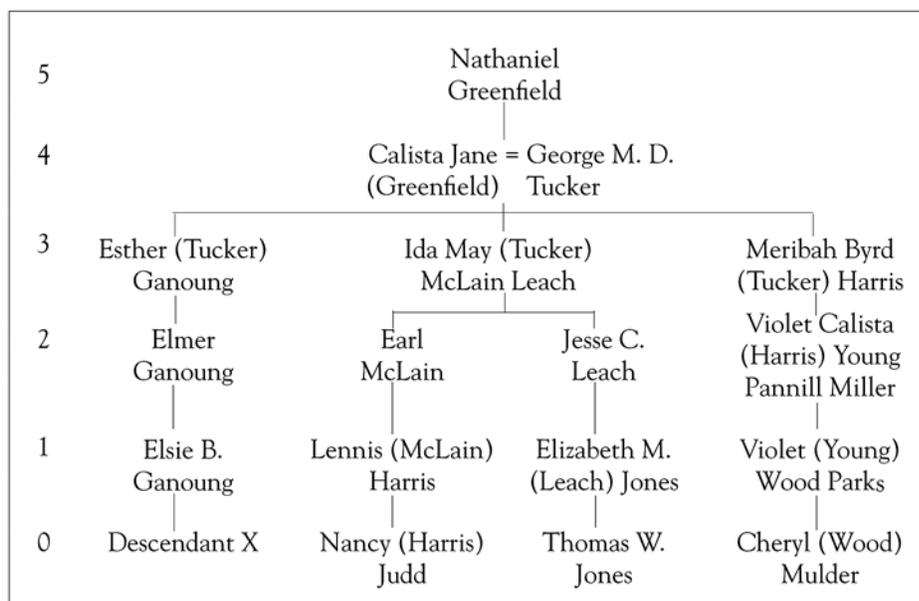|			
5		Nathaniel Greenfield	
4		Calista Jane = George M. D. (Greenfield) Tucker	
3	Esther (Tucker) Ganoung	Ida May (Tucker) McLain Leach	Meribah Byrd (Tucker) Harris
2	Elmer Ganoung	Earl McLain / Jesse C. Leach	Violet Calista (Harris) Young Pannill Miller
1	Elsie B. Ganoung	Lennis (McLain) Harris / Elizabeth M. (Leach) Jones	Violet (Young) Wood Parks
0	Descendant X	Nancy (Harris) Judd / Thomas W. Jones	Cheryl (Wood) Mulder

Figure 5. Example of a chart. Graphic image from Jones, "Too Few Sources to Solve a Family Mystery?," 91. To conserve space, this illustration omits the chart's documentation.