Literature Reviews are not just for Academicians! Advance Your Genealogy Research

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What is a Literature Review?

In academic journals of many varieties, Literature Reviews (Lit Reviews), or Literature Surveys, are a requisite component of articles submitted for publication. Among other objectives, the Lit Review is meant to be a comprehensive study and summary of pertinent and previously published information about the article's topic.[1] The author surveys likely sources, such as other books and articles, to gather information. This information is then summarized at the beginning of the new article, to set the stage for adding to that body of knowledge, or perhaps even contradicting it.[2]

Let's say, for example, it is a marketing journal. The author conducted studies on why offering free shipping from an online retailer increases orders. The Lit Review for that article would cover and summarize the extant literature on free shipping – how it may decrease overall profits yet increase the lifetime value of a customer, and so on.

Why Utilize a Literature Review for Genealogy Research?

So, why would we genealogy researchers benefit from conducting our own Lit Reviews? Dissimilar to academicians publishing in journals, genealogy researchers are not usually attempting to add to a body of knowledge or contradict it. Rather, we are trying to solve our own genealogy puzzles. Perhaps you have hit a brick wall and need ideas on how to further an ancestor's line. You may want to understand precedents for a certain type of research. Or reading case studies may be the way you learn new methods best. Those are just some of the reasons why – or when – a Lit Review may work for a genealogist.

This article was prompted by the author's research into people of the same name, and its ensuing Lit Review (see case study below) to understand the methods for merging or separating identities. Other circumstances for your own Lit Review may include something like these examples, broken down into a few categories:

Methodology

- Utilizing indirect, negative, or conflicting evidence.

- Finding living individuals.

- Writing a genealogically based biography, family history, or other story.

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1 *Scribbr* (https://www.scribbr.com/dissertation/literature-review/ : accessed 29 December 2019), "How to write a literature review." See Also, *The Writing Center, University of North Carolina at Chapel Hill* (https://writingcenter.unc.edu/tips-and-tools/literature-reviews/ : accessed 29 December 2019), "Let's get to it! What should I do before writing the literature review?"

2 *USC Libraries* (https://libguides.usc.edu/writingguide/literaturereview : accessed 29 December 2019), "Research Guides, The Literature Review."

Geography

- Researching in urban areas.

- Researching in a U.S. geographic location that is new to you.

- Moving research abroad into a new country, ethnicity, or language.

- Digging into legal issues for a time and place – for marriage, inheritance, probate and other dealings.

Record Groups

- Using a record group that is less familiar such as military records, probate records, and deeds.

- Analyzing and writing DNA results.

Miscellaneous

- Interviewing relatives for context-rich stories and a need for best formats and questions.

- Learning about religious affiliations, such as Quakers, and their impact on our families' choices.

Steps in the Process for Conducting a Lit Review

Don't let this academically focused process sound overwhelming. It can be broken down into the following simple and easy-to-follow steps:

1. **Define the topic**, just like you would for a research question on focused research. There are a few keywords or phrases that may be commonly used for it, such as those noted in the examples above.

2. **Identify Journals, Publications, Websites and Webinars.** Determine which publications will help you find information. Is it a scholarly journal like the National Genealogical Society Quarterly (NGSQ)? A magazine like NGS Monthly? A regional journal such as the Ohio Genealogical Society Quarterly? A webinar series like Legacy Family Tree Webinars? A specialty website such as EvidenceExplained.com for citation formatting? Or even a Facebook Page like Genetic Genealogy Tips and Techniques?

3. **Scan all article titles** in those publications, and if there is an online index that allows a search, **use keyword phrases**. Usually if the article has a main focus on your topic, it will be included in the title, e.g. *"DNA Identifies a Father for Rachel, Wife of James Lee of Huntingdon County, Pennsylvania."*[3] In this example you may have been looking for DNA articles, YDNA articles (indicated by the reference to a "father") or information on research in Pennsylvania.

   If an online index is searchable, vary the keyword phrases that you use to search for articles, but don't use it as a substitute for skimming article titles. As an example of variance in keyword phrases for military records, keywords could include military, civil war, revolutionary war, soldier, pension, draft, and so on.

4. **Skim articles** to deem if they are appropriate. After you have identified possible articles in all of your targeted publications, take time to scan each article to determine if it is what you need. If not, discard it. If potentially helpful, then retain it.

5. **Read articles and record relevant information.** Whether it is reading an article

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3 Patricia Lee Hobbs, "DNA Identifies a Father for Rachel, Wife of James Lee of Huntingdon County, Pennsylvania," *National Genealogical Society Quarterly*, March 2017, V 105, 43-56.

or watching a webinar, take notes to record items of interest to you. During this time, create a citation for each source and record pertinent data. Depending on your topic, you may create categories or checklists, whatever works to help you achieve your objective. For example, if you are learning about researching Norwegian immigrants, you may make a spreadsheet with a row for each source. Then, in columns on your spreadsheet you may document what record types are discussed such as baptismal records, Bygdebøker (farm books), censuses, or other types of categories. Logging this information will help you identify patterns and themes that may help, or just serve as a reference to return to later.

"People of the Same Name" Lit Review Case Study

This article was prompted by a search for research on people of the same name. Fortunately, it is not an uncommon issue in genealogy research and many relevant articles were found. The following steps explain how the Lit Review process described above was applied to same-named individuals in order to merge or separate their identities.

1. **Define the topic.** Find information that treats people of the same name to identify new methods for separating or merging identities.

2. **Identify Journals, Publications, Websites and Webinars.** The following publishers were identified that may have relevant articles.

   - *National Genealogical Society Quarterly*

   - *The American Genealogist*

   - *The Genealogist*

- *The Register*

- *The New York Genealogical & Biographical Record*

- *National Genealogical Society Magazine*

- *Crossroads*

- *Association of Professional Genealogists Quarterly*

- *Legacy Family Tree Webinars*

3. **Scan all article titles and use keyword phrases.**

   A combination of scanning and searching article titles was employed, depending on the technology provided for each publisher. The keywords used included:

   - Same name

   - Similar name

   - Merging and separating identities

   - Which (e.g. Which Amos Lockwood of Fairfield County, Connecticut, was Gilbert's Son, and Where Did He Go?)[4]

   However, it is important to note that many articles did not include these initially identified keyword phrases and thus scanning through the titles was key to identify additional resources. When your keyword phrases do not produce results, or you just want to find more potential articles, then you can skim the table of contents for issues of your targeted publications. In the same name case study, additional articles were identified by this method because their titles did not have the keyword phrases in them.

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4   Claire Ammon, "Which Amos Lockwood of Fairfield County, Connecticut, was Gilbert's Son, and Where Did He Go?" *National Genealogical Society Quarterly*, March 2018, V 106, 18.

Examples of such titles included:

- "Two Thomas Baxters and Their Sons, Also Named Thomas" from *NGSQ.*[5]

- "Sorting out Two Men Named Charles Goodrich Born in 1720 in Connecticut, and Their Wives" from *The American Genealogist.*[6]

- "In Atlanta, Los Angeles, Philadelphia, and Elsewhere: One Paul Richard Stockton or More?" from *NGSQ.*[7]

  The new keywords "two," "also," "sort," "one," and "more" can then be added to another keyword search for additional articles that may include these keywords.

4. **Skim articles.** Each article was scanned to determine if it fit the objective of the same name search. Several were discarded, but most fit into the Lit Review study. The results of the searches are noted after each publication.

   - National Genealogical Society Quarterly – 24 articles found for dates 1980-present

   - The American Genealogist – 16 articles found

   - The Genealogist – 1 article

   - National Genealogical Society Magazine – no articles found

   - Crossroads – 1 article

   - Association of Professional Genealogists Quarterly – no articles found

   - Legacy Family Tree Webinars – 5 webinars found

5. **Read articles and record relevant information.**

   Struggling with people of the same name brought up certain identifiers, or descriptors, in research. One of the objectives of the Lit Review was to expand that list of descriptors, to determine if anything had been overlooked. Based on the Lit Review, the following list is fairly comprehensive for what authors used to help determine if there was one person, or multiple.

   Possible Identifiers and Descriptors in Same Name Research

   - Name variances

   - Age or birthdate, given or inferred

   - Occupation

   - Education

   - Signature or literacy

   - Financial status

   - Address, specific geographic location and/or land ownership

   - Slave ownership

   - Estate purchases on inventory lists

   - Wives names

   - Children's names

   - Parents' names

   - Religion

5 Elizabeth Pearson White, "Two Thomas Baxters and Their Sons, Also Named Thomas," *National Genealogical Society Quarterly,* March 1987, V 75, 51.

6 Varbar J. Mathews, "Sorting Out Two Men Named Charles Goodrich Born in 1720 in Connecticut, and Their Wives," *The American Genealogist,* October 2010, V 84, 300-307.

7 William M. Litchman, "In Atlanta, Los Angeles, Philadelphia, and Elsewhere: One Paul Richard Stockton or More?' from NGSQ," *National Genealogical Society Quarterly,* December 2017, V 195, 251.

Journal	Vol	No	Month	Year	Beg Pg	End Pg	Author	Title	Identifiers/Descriptors ; Principles Applied and Methodology
NGSQ	103	1	Mar	2015	29	36	Henderson, Harold	Crossing the Continent with Common Names: Indiana Natives John and Elizabeth (Smith) Smith.	Naming conventions, timelines, geographic locations, FAN club
NGSQ	79	4	Dec	1991	268	282	Hendrix, Ge Lee Corley	John Bond vs John Bond: Sorting Identities via Neighborhood Reconstruction.	Working forward generations, FAN, mapping
NGSQ	103	4	Dec	2015	263	280	Hill, Ronald A.	Middle Names from 1792 and 1793 Help Reconstruct Ancestry of John Rodda Jr., Butcher at Helston, Cornwall.	Middle names, locations and maps, signatures, occupations
NGSQ	94	3	Sep	2006	205	220	Hill, Ronald A.	Which John Bray of St. Gennys in Cornwall Married Hephzibah Lillicrap at St. Juliot?	Mapping, timeline,
NGSQ	106	3	Sep	2018	217	238	Hoyt, Sharon L	Her Sixth Matrimonial Venture: The Many Marriages of Ida May Chamberlain	Parents' names, geographic moves and patterns
NGSQ	194	2	Jun	2016	125	138	Jackson, Darrell	Which John Woodson Served in the 4th Virginia Regiment of Foot, 1776-1778.	Occupation,
NGSQ	88	2	Jun	2000	111	121	Jones, Thomas W.	Merging Identities Properly: Jonathan Tucker Demonstrates the Technique.	
NGSQ	96	2	Jun	2008	101	120	Jones, Thomas W.	The Three Identities of Charles D. McLain of Muskegon, Michigan.	Timeline, geographic locations, name variances,
NGSQ	195	4	Dec	2017	261	272	Joyce, Jan	Susan Gliddon of Bridgerule, Devon, England; and Summit County, Ohio: One Person or Two?	GPS, naming conventions,
LFTW	XXX	XXX	21-Mar	2017	XXX	XXX	Koford, Rebecca Whitman	Are You My Grandpa?. Men of the Same Name: Case Studies.	Marital law, timelines, locations, negative and indirect evidence, LOTAC, onomastic evidence,
NGSQ	101	3	Sep	2013	165	174	Lagoudakis, Nickola Beatty	Overcoming Common-Name Barriers to Identify Parents: James Johnson of Amelia, Essex, Lunenburg and Pittsylvania Counties, Virginia.	Naming patterns, indirect evidence, chronology

Example of data captured from a same name literature review.
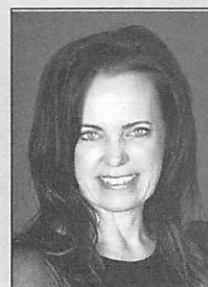
Methodology and Analyses

Identifiers and Descriptors were not the only objective sought during the Lit Review. Just finding those items did not typically "solve" a challenge. Usually, an analysis or method was utilized in combination with identifiers. These methods typically included one of the following:

- Creating timelines including locations, ages and all available identifiers.

- Mapping from geographic location and land ownership.

- Analyzing naming conventions and patterns, name spellings, middle name or middle initial usage, pronunciations or other onomastic evidence.

- Application of Friends, Associates, and Neighbors (FAN Club) principle including neighbors and witness names.

- Consideration of macro environmental factors or historic events.

- Using negative or indirect evidence.

- Writing it out – use expository writing which often identifies gaps in the research.

You can record information in a variety of ways. In the example above, a spreadsheet was used to record and categorize some of the articles mentioned from the same name research.

A Lit Review offers genealogy researchers the opportunity to not only advance their own research through learning methods applied by others, but also to expand their own knowledge. Performing a Lit Review when you are stuck, hit a brick wall, or can't think of what to do next, may be the avenue to open up new and successful research.

Jan Joyce, DBA, CG, CGL(SM), AG, is a genealogy researcher who enjoys writing, teaching and researching her own family in the Midwest, England, Norway, Germany and Ireland. Her background in academia as a professor of marketing and marketing author prompted her to perform Literature Reviews in her own genealogy research which subsequently instigated this article.

Irish Records: Civil Registration and Church Records

by Terri O'Connell

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