EVIDENCE MINING & CONTEXT:
POWERFUL TOOLS TO DIG DEEP

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Standards Encourage Effective Methodology

Methodology is defined as "a body of methods, rules, and postulates employed by a discipline" and "the analysis of the principles or procedures of inquiry in a particular field."[1] *Genealogy Standards* can be considered not just a book to encourage high standards of excellence, but one that also describes the methods most effective for research in the field of genealogy. For this lecture, examples of specific standards that inspire methodological success are:

- Standard 40:   Evidence mining   ignore no potentially useful evidence
- Standard 12:   Broad context   information affects planning & scope
- Standard 60:   Selection of appropriate options   writing proof arguments/statements
- Standard 64:   Background information   economic & geographical context, etc.
- Standard 73:   Biographical information   context for specific eras & cultures
- Standard 74:   Reports   writing with context & background

Evidence Mining: Asking the Source Probing Questions

Sources are documents, headstones, newspaper articles, pictures, or other historical items which may contain information we need to answer questions about our ancestor's life. Details in these sources, even seemingly small ones, may become significant in our quest as we seek evidence for the answers to our research questions. Standard 40 reminds us that "Genealogists ignore no potentially useful evidence…" even if it conflicts or complicates our working theories.

Using Standards to Develop Contextual Questions

With the standards listed above, researchers are guided to ask deeper questions of context. As an example, here are some ideas in the form of checklists that encourage strong methods of contextual research.

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[1] *Miriam Webster Online Dictionary* (https://www.merriam-webster.com/dictionary/methodology), "methodology."

Standards 40 & 64: Reviewing the Records for Future Planning

Standard 11 directs researchers to "analyze starting-point information for accuracy." With that in mind, Standards 40 and 64 can guide our analysis of what-do-we-really-know about the ancestor. One must correctly interpret their starting point information to efficiently direct future research. Take all the sources you currently have about an ancestor and look for patterns, factual consistencies and inconsistencies, and what circumstances you still need to understand as you develop a research plan. The research plan should involve building a contextual setting for our ancestors' lives. Effective genealogists are also good historians.

Know the information & assess its evidence:
- ☐ Read every word, notation, and abbreviation of the source
- ☐ Understand each word, do not assume context of a word/phrase
- ☐ Is the source original or just appears "original" (ex: handwritten transcriptions)
- ☐ Is there a clear informant? Who and what is their relationship?
- ☐ Are there potential multiple informants (ex: death certificate)?
- ☐ Was the informant a likely witness to the event or report second hand?
- ☐ How soon after the event was the document created & does that potentially impact the informant's memory?
- ☐ Does the information directly answer the question? (not guarantee of truth)
- ☐ Does the information conflict with other sources?
- ☐ Does the information indirectly support information from other sources?
- ☐ Is the researcher keeping an unbiased approach to the information, regardless of previous hypothesis?

Develop context for the information:
- ☐ What rules/laws inspired the creation of this source (ex: laws for military pensions)?
- ☐ How might laws influence information given in a source? (ex: age to marry)
- ☐ Is the source typical or complex in nature (ex: private property deed vs. military bounty land warrant & patent) to necessitate understanding the document?
- ☐ Is the researcher understanding the words/information in context of the time (ex: "Indenture" could mean property deed or a contract for limited servitude)
- ☐ Was this source part of a series of documents? (ex: will > administration > inventory)
- ☐ If in a private collection or repository special collection, is the provenance known?

Look at each piece of information as a potential lead in your investigation to another document not yet found. A simple example is when a death certificate shows the funeral home and cemetery—those are two new leads to sources not yet explored. Censuses are a wealth of information for leads to military connections, land, Agricultural or Defective, Dependent, and Delinquent Schedule censuses, birth years, marriage and immigration years, naturalization, and more. A key part of evidence mining is the **ANALYSIS** of the quality of the source, its informant, and reliability. (Standard 36) Are there conflicts in the information? Embrace them! Plan later to chase them down. Solving conflicts usually leads to more needed information.

Standards 12 & 73: Researching Context

A more difficult mining expedition—and all the more essential—is to research the context behind each source. What prompted the creation of that source and what laws dictated the ability of the ancestor to participate in it (or not?). Were there application forms associated with this source, or subsequent forms, documents, or payments created from this source? *What was in the law* to allow an ancestor to be part of this at this time and in this place? Are too many assumptions being made about a source, or will added context take the research further (even about something as common as a census)? Law is everything to many of the sources used—social norms, church law, town policies, county courts, state law, federal or military law. Investigate or take the chance of missing evidence that can clear up the conflicts. Context allows researchers to weigh and favor one piece of evidence over another.

Biographical Information:
Include context gleaned so far and then **research the place and era**; this is as important researching the names, and a logical precursor to name-directed searches.

- ☐ What knowledge about the ancestor's historical era helps avoid presentism?
- ☐ Is the geography significant to the ancestor's migration, economics, or occupation?
- ☐ Consider the society of city dwellers to small towns or plantations and its affects on finding the ancestor's associates, neighbors, or family?
- ☐ Were some groups limited in their participation of records and how (by gender, color, or religion)?
- ☐ Did their religious doctrine/society influence rituals of death, marriage, or diet?
- ☐ What was the impact of military or federal government policies in the location?
- ☐ Do linguistic & paleographic influences change spellings and pronunciations?
- ☐ What were the push-pull factors for migration patterns and what routes did they take?
- ☐ Did crop failures, the installation of canals or railroads impact the economy?
- ☐ Find historical boundaries and their changes in the era?
- ☐ Where were records created for this jurisdiction? Where have those records migrated to now?

How & Where Do I Research to Find Context?

Delving into the context—or historical understanding—of the sources and information given in them is a research journey in itself. Do not consider this time wasted. Information, it is said, is *inspiration*. Context for a source has great interpretive value and will therefore influence and strengthen our ability to more correctly evaluate the sources and information.

Researching context gives us the opportunity to apply both **direct historical detail** and **inferred historical context**. We interpret our ancestor's sources, place, and era, by finding references to infer what our ancestors may have experienced.

Examples for Finding Direct & Inferred Historical Context
- ☐ Local historical & biographical publications (county "mug books" and histories)
- ☐ Newspapers and city directories
- ☐ Books & publications studying a historical event or society
- ☐ Society, County, and State genealogical journals
- ☐ Publications for a specific society or group (ex: firemen, military units, churches)
- ☐ Journals and diaries published of unrelated people in the time and place
- ☐ Scrapbooks or manuscript collections in historical societies or university libraries
- ☐ Historic state or local laws and Acts of Congress relating to an event or situation
- ☐ Religious histories, religious news sheets, or publications on doctrine
- ☐ Contemporary maps, atlases, and gazetteers
- ☐ Historic dictionaries for obscure words or languages
- ☐ Instructional manuals. Ex: business clerks, census enumerators, court officers, immigration clerks, railroad employees, federal workers, tax collectors, welfare societies
- ☐ Notations on the source itself for clues about the controlling law or jurisdiction
- ☐ Introductions to publications on a record type. Ex: Indexes of taxes for an area
- ☐ Finding aids for repositories (National Archives, university libraries, state archives)
- ☐ Websites for repositories about collections (Library of Congress, foreign archives)
- ☐ Websites with concentrations on subjects (medicine, social groups, locations)

Examples of Researching Historical Context	
Question	Research Path
Margaret McDaniel applied for a military pension as the widow of a Revolutionary soldier. She was rejected. There is a note in the file about the "Act of 1836." <u>Question</u>: What was this law and how did it affect her eligibility?	*Google* > search for "Revolutionary War Act of 1832" > hit for a publication by the National Archives in the blog *The Twelve Key* > article "Revolutionary War pension files—an introduction" by Claire Kluskens (https://twelvekey.com/wp-content/uploads/2014/10/ngsmagazine2006-04.pdf). <u>Answer</u>: The eligibility requirements were relaxed by the Act of 4 July 1836 (5 Stat. 127) to allow widows a pension if they had married the veteran before the end of his service. The Act of 29 July 1848 (9 Stat. 265) allowed for widows who married before 2 January 1800.
A deed from 1833 in Grainger County for a 100-acre tract granted in 1790 (then <u>Hawkins County, Southwest Territory</u>?) showed that the seller was the daughter and sole heir of James McDaniel "who was Killed by the Indians and died without leaving a will." <u>Question</u>: How can I learn about the situation in this area between settlers and Native Americans between 1790 and 1833?	*HathiTrust.org* > search terms "Indian Tennessee" > hit *for History of Tennessee: The Making of a State by James Phelan* (1889). *Jstor.org* > search terms "Nickajack Campaign" > hit for "The Joseph Brown Story: Pioneer and Indian in Tennessee History" by C. Somers Miller (1973). *Tennessee Virtual Archives* (TeVA) > Maps at the Tennessee State Library… > "<u>Goodpasture Indian Treaties map with Key</u>." <u>Answer</u>: The story of relations between the government and the Native Americans is complex. From Colonial times through the War of 1812, treaties were made with the Native Americans, treaties were broken, and settlers pushed the boundaries into Native lands. The British allied with many tribes in both wars, and when they retreated the Native Americans were left with the consequences. The Treaty of the Holston in June 1791 laid out protected Cherokee lands, but squatters continued to settle, leading to attacks in 1792. The Nickojack Campaign of 1794 was a massacre that opened up much of the territory to white settlers. Later, for men of Tennessee, battles of the Creek War in 1813–1814 were their primary actions. McDaniel could have been killed in these or other conflicts as a militiaman or settler.

Standards 60 & 74: Writing to Interpret Context & Evidence

Writing is a necessary process for analyzation. The Genealogical Proof Summary (GPS) tells researchers that proof must be compiled into a "soundly written conclusion based on the strongest evidence." Contextual information about the record sources often is critical to interpretation of the information, and part of building arguments for indirect evidence. Context should be woven into the narrative argument to explain situations and possible motivations for our ancestors' actions and community.

Standard 60 shows examples for levels of complexity that our writing may take the form of: proof statements, proof summaries, and proof arguments. This standard applies to context because it reminds us to "provide rationale for a conclusion's accuracy" especially for conflicting and indirect evidence. The rationale is often based on an understanding of the purpose (read: context) of the record's creation and use at the time.

Standard 74 discusses reports. This section can guide the researcher as they evaluate their writing in progress. Any report, whether to another person or as part of a narrative case study, can utilize the concepts in this standard. These may include

- ☐ Focus on the objectives of the research question
- ☐ "Context and background of the planned research"
- ☐ Restrictions on source access
- ☐ Logical explanation of details (which include contextualizing records)
- ☐ "Explanation of the deficiencies" (which necessitates an understanding of the broader situation for records in the area and time)

Next is an example of writing with contextual elements (assume that this is part of a larger narrative in which previous pages established the background information):

Uriah Pollay settled in what would become Cayuga County, New York, as early as 1796, part of an area known as the Finger Lakes region.[2] If he is the same Uriah Polly/Polley who served in the Revolutionary War from Connecticut, what might have motivated his move west to this area?[3]

Following the Revolution, the country was hungry for land. Soldiers who traveled to the Genessee Country during the Sullivan-Clinton Campaign against the Native

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[2] Cayuga County, New York, Deed Book F:8, Eben Guthrie to Uriah Polly, 6 January 1796; image, *FamilySearch* (https://www.familysearch.org/ark:/61903/3:1:3QSQ-G9W2-B6C1) > image group number (IGN) 7167279 > images 22–23; citing Cayuga County Clerk. This area was Onondaga County until Cayuga formed in 1799.

[3] U.S. National Archives, *National Archives Catalog*, database with images (https://catalog.archives.gov/id/312090930), NA Identifier 31209093: "Polley, Uriah – State: Connecticut, Regiment: First Regiment," 82 images; citing Compiled Service Records of Soldiers Who Served in the American Army During the Revolutionary War, Record Group 93: War Department Collection of Revolutionary War Records, National Archives.

Americans returned with glowing reports of the beauty of the area and fertile lands. Land speculators were buying up large tracts in the west for resale and sent out broadsheets advertising a new Eden. After 1783, New Englanders were the greater part of the "parade of restless people" making their way to the Genessee Country.[4] The area that would include Cayuga County (formed in 1799) was originally part of the Military Tract reserved by the state legislature in 1782 for veterans who served from New York. Its eventual settlement was taken up by only a few soldiers; instead, warrants were sold off and redeemed by land speculators for resale to eager pioneers.[5]

Uriah was at the forefront of this flood, and his journey arduous. Arriving by 1796, he travelled the unforgiving trails even before the New Genessee road was constructed in 1797. His arrival was made a little bit easier when he found some communities already established. For example, by 1796, Hardensbergh Corners (later the City of Auburn) boasted many log cabins, a saw mill, school, mercantile store, tavern, and a Baptist minister.[6]

Researching and writing this example inspired me to look for soldiers from Uriah's Connecticut regiment who may have also made this journey as part of his cluster of associates. Make contextual research a regular habit in your searches for improved analysis and understanding of the sources you encounter.

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[4] David Maldwyn Ellis, "The Yankee Invasion of New York, 1783–1850," *New York History*, 32, (January 1951): 3–7; imaged, *JSTOR* (https://www.jstor.org/stable/23149993).

[5] Marian S. Henry, *New York Essays* (Boston: New England Historic Genealogical Society, 2007), particularly chapter 14, "Bounty Lands in the Military Tract in Post-Revolutionary New York State," 125–131.

[6] Benjamin B. Snow, ed., History of Cayuga County, New York (Auburn, New York : John P. Smith Printing Company, 1908), 10–13; imaged, *Internet Archive* (https://archive.org/details/historyofcayugac00cayu/page/n7/mode/1up).