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

By Thomas W. Jones, PhD, CG, CGL, FASG, FUGA, FNGS

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

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and if the source is unpublished, the event date, recording date, or both.

4. Where within 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 is 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 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.

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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


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**

<table>
<thead>
<tr>
<th>YEAR AND PLACE</th>
<th>NAME</th>
<th>BIRTH YEAR AND PLACE</th>
<th>FATHER’S BIRTHPLACE</th>
<th>MOTHER’S BIRTHPLACE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1870 Quincy, Illinois</td>
<td>George W. Edison</td>
<td>1860–61 Illinois</td>
<td>Canada</td>
<td>Ohio&lt;sup&gt;a&lt;/sup&gt;</td>
</tr>
<tr>
<td>1880 Quincy, Illinois</td>
<td>George Edison</td>
<td>1860–61 Illinois</td>
<td>Canada</td>
<td>Ohio&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>1900 St. Louis, Missouri</td>
<td>George W.&lt;sup&gt;c&lt;/sup&gt; Edison</td>
<td>Nov 1861 Missouri</td>
<td>Missouri</td>
<td>Missouri&lt;sup&gt;c&lt;/sup&gt;</td>
</tr>
<tr>
<td>1910 Springfield, Missouri</td>
<td>George W. Edison</td>
<td>1864–65 Illinois</td>
<td>Kansas</td>
<td>Kansas&lt;sup&gt;d&lt;/sup&gt;</td>
</tr>
<tr>
<td>1920 Evansville, Indiana</td>
<td>Edwin Wellman</td>
<td>1859–60 Ohio</td>
<td>Ohio</td>
<td>Ohio&lt;sup&gt;e&lt;/sup&gt;</td>
</tr>
<tr>
<td>1930 Decatur, Illinois</td>
<td>Edwin Edison</td>
<td>1860–61 Illinois</td>
<td><strong>Scotch</strong> English</td>
<td>Ohio&lt;sup&gt;f&lt;/sup&gt;</td>
</tr>
</tbody>
</table>

<sup>a</sup> 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.

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

<sup>c</sup> 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.

<sup>d</sup> 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.

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

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

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