RESOURCES FOR GENEALOGISTS AT ALL EXPERIENCE LEVELS

including

I. TIPS ON GETTING THE BEST RESULTS FROM HISTORICAL RECORDS AND DNA

II. MY FAVORITE FREE AND INEXPENSIVE/HIGH-VALUE WEBSITES FOR GENEALOGY

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I. TIPS ON GETTING THE BEST RESULTS FROM HISTORICAL RECORDS AND DNA

A. Genealogical education

Whether you're a newcomer to genealogy or have decades of experience, nothing makes the time you spend on research more satisfying than ongoing education. There are many places and ways to get it, including the websites listed in Part II of this handout, but I highly recommend two that cover a wide range of topics and can be obtained temporarily for free or regularly at modest prices.

1. *Family Tree Magazine* (www.familytreemagazine.com), aimed at a general audience, provides a window into the key methods, tools, and sources used in genealogy and helps its audience stay up to date on new developments in the field. The website also offers many free resources even for non-subscribers, from research tracking forms and templates to charts and e-books, at https://bit.ly/3wg4MzV. You can borrow recent issues of the digital magazine through your public library and the electronic reading app Libby, part of Overdrive.com (previously RBdigital).

    With a paid subscription to the magazine—about $20 with a current discount for six digital issues (more for print or print + digital)—you will receive new issues regularly. A Family Tree Website VIP Membership ($40 a year) provides access to numerous how-to articles and videos as well as research guides for every state. A Digital Magazine + Website VIP Membership at $50 a year provides all the above, including access to all past issues of the magazine.

2. **Legacy Family Tree Webinars** ((https://familytreewebinars.com/), in my estimation the best and cheapest site for genealogical education at $50 a year, has a library of almost 1,800 webinars on genealogy and family history for everyone from beginners to the most advanced and adds new offerings ever month by top people in the field. My progress from novice to professional is based largely on these webinars, particularly the ones on research methodology, evidence, less familiar record collections, research in other countries, and genetic genealogy. You can search the webinar library for specific topics (e.g., organization, historical records, African diaspora, DNA, MyHeritage), languages (French, Spanish, Swedish, etc.), presenters (e.g., Thomas W. Jones or Michelle Leonard, two of my favorites), or audience (beginners). Look especially for new webinars sponsored each month by the Board for Certification of Genealogists (BCG),

which are offered free when streamed live and for the week following, then as a recording available to members. Blaine Bettinger's five-part series "Foundations in DNA" is a great way to get your bearings in this area of research. All webinars come with a syllabus, valuable in itself.

B. Staying organized

The two educational resources above are both places to look for help with organization, and a web search for "organize genealogy" will provide many more. Drew Smith's book, *Organize Your Genealogy: Strategies and Solutions for Every Researcher* (Family Tree Books, 2016), is available in paperback and Kindle editions and can be found in public and genealogy society libraries and as used copies. Janine Adams, a professional organizer and genealogist, has a blog on this topic at https://organizeyourfamilyhistory.com/. Thomas MacEntee's Facebook group, "Genealogy Do-Over," was launched several years ago to help those of us who put our love of research before any thoughts of organizing it.

C. Staying organized and focused: Research methods that help

If you've dabbled in genealogy enough to develop an appetite for more, you'll want to be better organized and confident in your research results. Have you ever spent hours researching your great grandfather Jim Jones only to discover that the records you found were for the wrong person? Have you amassed a lot of documents and information only to discover that the sources hold conflicting information? When you're gathering evidence for great grandfather Jim and find him at an intersection--mentioned in an obituary for Jane Smith (née Jones) as her brother, do you start down another road to learn more about her? Genealogical research methodology provides an essential framework for ensuring the best research results while staying organized. It starts with identifying one or two <u>focused</u> research questions—for example, When and where was James Jones, father of Janet Jones of Jersey City, Hudson County, New Jersey, born? From there, you create a research plan including key information about Hudson County and New Jersey and the records available and go on to do research, logging your steps and findings and source citations, evaluating the evidence, writing your conclusions.

1. **The Legacy Family Tree Webinar Library has a category on methodology**, many sponsored by BCG. Shellee Morehead teaches the foundation of genealogical methodology, the Genealogical Proof Standard, in "Another Kind of Navigation: GPS for Genealogy. LaBrenda Garrett-Nelson, current BCG president, offers one on planning research. Thomas W. Jones, a brilliant presenter and genealogy thought leader, provides one on genealogical documentation *aka* source citations. Minnesota's own Jay Fonkert has "Turning Raw Information into Evidence: Tips for Drawing and Explaining Conclusions." There are many more.

2. **Genealogical Standards**

   The GPS, created by the Board for Certification of Genealogists for <u>all</u> genealogists, is the foundation of research methodology, but BCG has also established standards for specific aspects of research: documenting (citing sources); planning research; collecting data; reasoning from

evidence; using DNA evidence; writing proofs, reports, lineage-society applications; teaching; and continuing education. There is also a Code of Ethics. BCG has updated the standards a few times in recent years, especially to reflect the use of DNA evidence in research. These are all explained in a small but important book titled *Genealogy Standards*, published by BCG. The second edition revised was published in 2021 and is available from the Board at www.bcgcertification.org. The Board's website provides more information about the standards and helpful resources under the BCG Learning Center tab. *Mastering Genealogical Proof*, a textbook by Thomas W. Jones, provides guidance for learning research methodology, and you can still find videos from DearMyrtle's study group on this book starting with (37) VIEWer Guide: Mastering Genealogical Proof Study Group - YouTube.

3. **Evidence Explained (https://www.evidenceexplained.com/)**

Elizabeth Shown Mills' website, called after her foundational resource for evidence evaluation and genealogical source citations ("Where did I find that?") is a treasure trove for serious genealogists, whether hobbyist or professional. It provides excerpts from the book (the latest is Third Edition Revised), QuickCheck Models, and a Forum for asking questions that ESM answers herself. You have to register for the site, but it's free.

D. DNA for genealogy

1. **Overview**

The number of people ordering DNA tests doubled in 2021 according to an article I saw recently, and the number of companies offering tests has also multiplied. If you search the web for guidance on choosing the best test, you'll find rankings that sometimes put companies unfamiliar to researchers like me at #1 based on their credentials in the genetics community. I checked one of these out recently and discovered that it has a policy that should turn away anyone wanting to use DNA for genealogy: It doesn't allow customers to download their raw DNA results. This means that you can't save the results to your computer and upload them to websites where you'll find genetic matches—all those cousins you don't know about. It also means that you cannot identify the specific DNA segments that you share with your matches, which, along with historical evidence, hopefully allows you to identify the Most Recent Common Ancestor (MRCA) you share with a group of matches.

There are four main DNA testing companies that focus on DNA for genealogy, and one other third-party website that allows people who tested with any company to upload their raw data, providing matches you wouldn't find otherwise. That third-party website is GEDmatch, which provides some invaluable tools for analyzing DNA matches, above all, its Triangulation tool. Triangulation—finding three or more matches not including close relatives like siblings or parents—who share an identical segment or half-segment of DNA is the only way to prove that they share a common ancestor. Use of its database by law enforcement to identify a prominent criminal put GEDmatch in the top news a few years ago regarding the privacy of those in its database. GEDmatch and other sites offering DNA tests for genealogy now require that users

choose whether or not they'll allow law enforcement to use their data. See below for more on using this site.

2. **Tests and testing companies**

The four main testing companies are AncestryDNA, Family Tree DNA (FTDNA), 23andMe, and MyHeritage. There are important differences between them that you should know if you're planning to order a DNA test or have already taken one. Here are some key differences but study the terms carefully before making a decision.

- The primary test for genealogy, the test available through all four companies, is the autosomal DNA test (atDNA). Your results will reflect the DNA you inherited from all your ancestral lines going back about 150 years.

- All four websites allow you to download your raw autosomal DNA results.

- FTDNA and MyHeritage allow you to upload your raw DNA data in a zip file to their sites for a minimal cost or free. Ancestry and 23andMe do not. This means that you can test with Ancestry or 23andMe and upload your results to FTDNA, MyHeritage, and GEDmatch to find additional matches.

- FTDNA, 23andMe, and MyHeritage all provide a Chromosome Browser and a way to download segmentation details. Ancestry does not. Its brand is built in large part on the family trees people create on the *Ancestry* website, so it provides ThruLines that suggest common ancestors and shared matches who can link their family trees to their DNA results—but many don't. They provide aggregate segment data—how many cMs (centiMorgans) of DNA you share with a match and the length of the longest segment, important data, but without letting you see the specific segments you share, Ancestry retains control of the details you need to do your own research. Ancestry also enforced a rule that another DNA analysis tool may not have access to your results on their database. You can still download your results from AncestryDNA and upload them to a site that allows that.

- Some testing sites, including 23andMe and MyHeritage, offer tests that include health information as well as data for genealogy.

- Pay attention to where each test is available for purchase. You should be able to find this information on the testing company's website. For example, under AncestryDNA Resources, you can find [Countries Where AncestryDNA® is Available](). If you have ethnic ties to countries not on this list—China, France, Israel, Italy, Lebanon, Ukraine, for example—and are looking for cousins in the "old country," you're not likely to find them.

- At this time, only one testing company, FTDNA, offers Y-DNA tests (your paternal or father's father's father's . . . line) and mitochondrial DNA (mtDNA) tests (your maternal or mother's mother's mother's . . . line. These lines trace DNA inherited from thousands of

years ago, your earliest ancestors. Your lists of matches typically include a majority of people who don't share a common ancestor with you within the last 150 or so years, so results may not be as useful for genealogy as autosomal results, but they can still be useful. If you have taken an autosomal test with FTDNA (called the Family Finder) or have uploaded your atDNA results from another company, you can order Y-DNA and mtDNA tests using your existing kit. When you get the results, check Advanced Matches in the FTDNA menu to see if there are people who match you on the Family Finder and another test, as this will help you locate your MRCA.

If you plan to take a Y-DNA test, order one that is at the 67-marker level or higher. For mtDNA, order the FullSequence test. Those that cost less won't return much value.

3. **Using DNA results for genealogy**

If you're interested in using DNA for genealogy, understanding how DNA is inherited and interpreted is essential. Legacy webinars, books, and blogs will help. Blaine Bettinger's Facebook group Genetic Genealogy Tips and Techniques includes researchers new to DNA and those more experienced, including other top people in genetic genealogy.

Have older family members—parents, grandparents, aunts and uncles--test for you if possible, as they will have more DNA from earlier generations than you or your siblings. If your father is not available and you don't have a brother who inherited your father's Y-DNA, think about others in your extended family who would have the same Y-DNA. For example, I'm an only child and my father was deceased by the time I was using DNA for genealogy, but my father's first cousin, son of his father's brother, was alive, and a cousin enlisted him to test for me. This can help you identify ancestors further back in your tree.

Ethical issues: Whenever you ask someone else to test for you or to make their results from a previous test available, have them sign a written agreement giving you permission to order a test for them and manage their kit so you have access to their results. Ask whether they wish to use their name or an alias and what privacy settings they prefer, including availability of their results to law enforcement. I can provide a sample.

Become familiar with key considerations for using DNA, including the threshold below which smaller segments can be false, based on research. Ethnic groups that practice endogamy—marrying within the group—typically produce results that can be misleading for determining relationships with matches. For example, the threshold for most populations is 7 or 8 centiMorgans (cM), but for Ashkenazi Jews, it's higher, 20 cM in most cases. Otherwise, a match may appear to be a closer relative than they really are.

Having your DNA results on all four of these testing companies' website as well as on GEDmatch will provide the most opportunities to find genetic matches. Read the resource information provided to learn how to interpret results.

Check the Wiki on the website for the International Society of Genetic Genealogists, ISOGG at ISOGG Wiki. Some of the information is highly scientific, but some will help you choose a test and understand how to interpret results. Seek out what matches your learning needs.

4. **Other tools**

- **GEDmatch (www.gedmatch.com)**

Started by two volunteers, GEDmatch is a third-party website with free basic analytical tools and the best tools available under its Tier I offerings (for $10 a month). It was started by two volunteers and was sold to a commercial company a few years ago but still involves one of the founders. The company just announced a new pricing plan that allows a new registrant to manage a few DNA kits on the site for free but a fee for those who manage more, such as tests for several family members, always a good idea. Another prime advantage of GEDmatch is that someone who tested with any of the main DNA testing companies can upload their results (a raw data zip file downloaded from the testing site) to GEDmatch, so you can find matches that won't be on your Family Tree DNA or 23andMe account. Also, since Ancestry is the only major testing company that refuses to offer the most basic analytical tool, a chromosome browser, you can break open your segmentation data by loading your results on GEDmatch. The only way to find proof of a common ancestor shared with a DNA match is by using triangulated data, not just shared matches.

- **Blaine Bettinger's Shared cM Project**

Blaine has been conducting research for several years into the amount of DNA people share with various relatives, and he has periodically published a very helpful chart with this data. You'll find the latest version, 4.0, at his website, The Genetic Genealogist - Adding DNA to the Genealogist's Toolbox.

- **DNA Painter** (https://dnapainter.com/)

Jonny Perl's DNA Painter website offers unique tools for analyzing DNA, including one that incorporates algorithms from Blaine's Shared DNA Project. When you enter the total DNA you share with a match, the site will return a list of possible genetic relationships you have with a match and the probability of each relationship. DNA Painter provides a way for you to map the segments you share with various matches, helping you locate which DNA segments were inherited from which of your lines. What Are The Odds? (WATO) is a tool that helps you use the segments you share with a group of matches whose relationships are known to figure out where you or someone related to you fits in their tree.

You'll discover other tools that have become available for DNA analysis as you learn more about genetic genealogy.

II. MY FAVORITE FREE AND INEXPENSIVE/HIGH-VALUE WEBSITES FOR GENEALOGY

GENERAL (some international, others U.S. or other specific localities)

Google: It's amazing what you can find just by searching the web.

FamilySearch (www.familysearch.org)

> Website owned by the Church of Jesus Christ of Latter-Day Saints (LDS) with material from the Family History Library. Search and browse records and check out the Research Wiki on topics and locations, the Catalogue for all record and resource holdings, and Books for digital copies.

National Archives and Records Administration (www.archives.gov)

> These are the archives that hold original copies of U.S. Federal Censuses, naturalization records, military records, and much more. Some of these records are available on the NARA website. Others will be added as they're digitized.

LDSGenealogy (www.ldsgenealogy.org)

> Lists major online locations for historical records by location or record type

Cyndi's List (www.cyndislist.com)

> Cyndi Ingle's list of resources on research locations and topics, regularly updated

USGenWeb (www.usgenweb.org)

> Local state and county websites developed and maintained by volunteers. Transcribed record indexes, records, historical information, etc. (Remember, transcribed records are derivative sources and may have errors, but GenWeb offers clues for finding the originals.)

InternetArchive (www.archive.org)

> Terrific resource for digitized books, including old county histories and government publications, city directories, etc. Currently working to capture images from Ukrainian websites that may be lost in the current conflict.

ArchiveGrid (https://www.oclc.org/research/areas/research-collections/archivegrid.html)

> "Includes over 7 million records describing archival materials, bringing together information about historical documents, personal papers, family histories, and more. With over 1,400 archival institutions represented, ArchiveGrid helps researchers looking for primary source materials held in archives, libraries, museums and historical societies."

Ancestry Library Edition and *Fold3 Library Edition*

> Limited versions of *Ancestry* and *Fold3*, military and other records, are available for free at many public libraries and genealogy societies.

JSTOR

> Scholarly articles on a wide variety of contextual topics for genealogy. Access through your public library, the Wellesley library, or the library at another of your educational institutions.

Olive Tree Genealogy ([Olive Tree Genealogy - free genealogy for your ancestors](#))

> How-to guidance and databases with particular strength in passenger lists, heritage groups, and less familiar records (almshouse records, etc.).

One-Step Web Pages (https://stevemorse.org)

> Flexible tools for finding immigration records, census records, and vital records and help on dealing with calendars, maps, foreign alphabets, etc.

NEWSPAPERS

ChroniclingAmerica ([Chronicling America « Library of Congress (loc.gov)](#)

> Growing digital collection of historical U.S. newspapers from 1789 to 1924.

The Ancestor Hunt (www.theancestorhunt.com)

> Kenneth Marks' one-man resource for links to historical newspapers by location.

New York Public Library Digital Collections (https://digitalcollections.nypl.org/)

> Variety of digitized resources from the library's vast collections.

MAPS

David Rumsey Historical Map Collection (https://www.davidrumsey.com)

Library of Congress (https://loc.gov)

BLOGS

Judy Russell on genealogy and the law (https://www.legalgenealogist.com/)

Blaine Bettinger on DNA for genealogy (https://thegeneticgenealogist.com/)

> See especially the Shared cM Project Version 4.0 and his X-DNA Inheritance Charts.

Roberta Estes on DNA (https://dna-explained.com/)

> Roberta has posted some great tips on using new GEDmatch and other DNA analysis tools.

FACEBOOK GROUPS

> At last count, over 9,000 groups devoted to genealogy and related historical research, including groups sharing research information and offering help on specific locations, ethnicities, DNA, criminal genealogy, etc. Look for ones whose members include the top genealogists in the field, especially Elizabeth Shown Mills, Judy Russell, and other top genealogists. Random Acts of Genealogical Kindness (RAOGK) groups and The Genealogy Squad cover broad topics.