

Building Citations While Writing

By Michael Hait, CG

Whether we are writing a complex-evidence case study for the *National Genealogical Society Quarterly*, an article for the *NGS Magazine*, or a family history for your family's eyes only, all of the research and writing relies on the sources. Unless we are intentionally writing fiction, factual statements have to be based on actual sources found by research. It follows that identifying our sources is just as important.

Citation Preparation

Before we start to write, we should begin identifying, examining, and evaluating our sources as soon as we find them. By recording all of the details about the source at the time that we are extracting the relevant information, we can assess the quality of the source itself.

All sources are not "created equal." Broadly, sources can be either records or authored works. A record is created by a person or agency to document some event or circumstance. Death certificates, baptismal registers, deeds, wills, tax lists, city directories, and private letters are just a few of the infinite types of records that one might find during research. An authored

work is a written text, usually a narrative that brings together facts from multiple sources in order to document an event or circumstance. This category includes all of the compiled genealogies, case studies, biographies, and other writings that genealogists and authors have created over the years, either published or unpublished.

Record sources can be further divided as either original or derivative. A derivative record is a copy of an original record and these could be handwritten, contemporary copies (such as a deed record in a deed book) or could be later compilations of transcriptions or abstracts by a genealogist. Even photocopies or scans of original records are technically derivative records, though if there are no signs of alteration, these image copies can usually be treated like an original. The original record is the first creation of a source in a particular fixed format.

Why does it matter if our source is an original record or a derivative record or an authored work? Humans err. The person who copied or abstracted a particular set of records could have easily misread or misinterpreted what he or she saw. The researcher who formed conclusions

from analysis of multiple records could have missed a vital clue. When using anything other than an original record, therefore, we must be certain that we accurately cite the actual source we used. We cannot cite the original record if we have not viewed it. Of course, if we are using a derivative record, we should try to obtain the underlying original, if at all possible.

Capturing Source Details

Identifying the source is the first step. If it is a book, then record the title. If it is a record without a title, then identify the type of record. Do this carefully. There may be separate registers for deeds, mortgages, and chattel sales, so be sure what you are viewing. The National Genealogical Society Home Study Course is one way to become acquainted with the many different record types, so that they can be accurately identified whenever they are encountered. Another great resource is Val Greenwood's book *The Researcher's Guide to American Genealogy*, 3rd edition (Baltimore: Genealogical Publishing Co., 2005) for the descriptive detail it provides about a wide variety of records.

Of course no writing about source evaluation and citation would be complete without mentioning Elizabeth Shown Mills's *Evidence Explained* (3rd ed., Baltimore: Genealogical Publishing Co., 2015). In this book Ms. Mills provides source citation templates and, more significantly, discusses source evaluation principles for nearly every type of source imaginable.

Evaluating a source starts with identification. Is it a published book or an original record? Was it online or in a courthouse basement? What kind of record is it and who created it? These are questions you should pose when you begin evaluating a source.

Check the cover, the spine, and the first few pages of a record book to capture the specific identifying details of the volume. This could be a date range, a volume number (or letter), or some other type of identifier. These small details

may be the only way to know which volume in a multi-volume series you are using.

When using a book, it is crucial to note on which page the relevant information is located and to be careful when noting page numbers. Some books only number folios, so every other page carries a number. You have to look back to the first page to determine how the page numbers progress. Some books might be numbered independently in separate internal sections, and the section will have to be identified as well. Other books may not use page numbers at all, but use a different organization scheme, such as a tax book with entries alphabetical by last name.

The next step is to identify the creator of the source. If it is a book, then the author or editor should be fairly easy to find. For many county or state records, the jurisdiction or agency should be recorded as the creator. The name of the specific clerk is not relevant in these cases: the clerk was merely an agent temporarily filling a role. Similarly, the church (but not the priest) of a baptismal register should be noted. For private records, the creator may be relevant. For example, the author of a diary or a personal letter should appear in the source information.

If a work is published, especially if it may appear in multiple editions published at various times by various publishers, it is important to record the publication information. This would include the edition number or name (if there is one), the place of publication, the publisher's name, and the date of publication.

Finally, the means of access should be recorded. This is where some citations seem to fail most often. The 21st century has opened up many options for accessing records. We may be viewing a true original record at its housing repository, or we may be looking at an image copy on microfilm or online. The way we access a record could potentially affect the reliability of that record as a source. For example, a microfilmed image in black and white may make light pencil marks invisible, or may make different colored inks all appear as indistinguishable shades of gray. While the

significance of these types of color changes will vary by record, it is important that we remain aware of the possibility by noting when we are viewing a microfilmed or scanned image copy rather than the original on paper.

Building a Citation

The general format of a citation is as important as the general format of a sentence. Capitalization and punctuation matter as much in a citation as in any other sentence. When a writer does not follow standard sentence structure and grammatical rules, then no one reading the sentence will be able to understand it without performing mental yoga. Luckily, the same structure and rules that apply to regular sentences also apply to source citations. When in doubt, the *Chicago Manual of Style* is the recommended style guide for sentence structure and punctuation usage.

A basic sentence begins with a subject, the “actor” of the sentence and in the same way, a citation begins with the creator of the source.

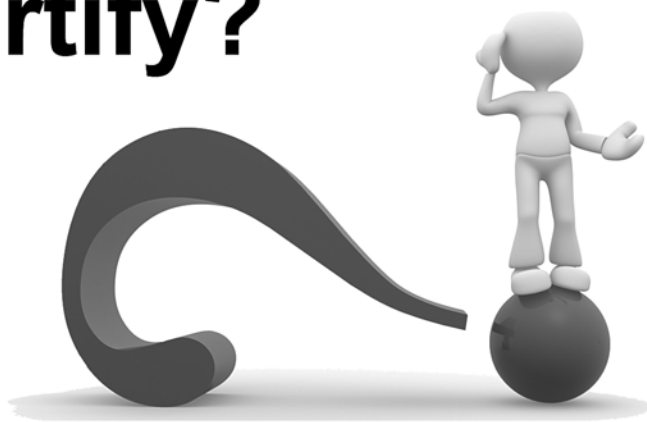
When examining the source earlier, this detail is recorded as whether it was the author of a book or manuscript, the jurisdiction or agency in charge of recording certain information, or otherwise.

The sentence continues with a verb, the “action” taking place. The title or description of the actual source would correspond with this action. When examining the source earlier, it was recorded and noted. This part should also include, within parentheses, any publication information for published sources.

Finally, a sentence concludes with the object, details about how the actor acted. This would include any page numbers or record specifics necessary to adequately identify the location of information within our source. This could be as simple as a page number or as complex as a description of a nonstandard organizational scheme with the appropriate location of information within this scheme.

Of course, we can't forget the access information. This would be the start of a

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separate clause. Just as separate clauses can be separated in a normal sentence with a semicolon, the access information would also follow a semicolon. Depending on the complexity of the access information, this could be as little as the name and location of a repository or as much as the format of digital images and the author, title, and publication information of a website.

Let's look at an example:

Prince George's County, Maryland, deed book JBB 1: 150–52, Zadock W. McKnew et ux to Judson W. McKnew, 21 Jul. 1840; digital images, Maryland State Archives, MDLANDREC (<http://www.mdlandrec.net> : accessed Aug. 2015).

The first piece ("Prince George's County, Maryland") is the jurisdiction that created the source. As an unpublished record, the deed book does not have a title, so the descriptive term "deed book" is used instead as the second piece. The volume title ("JBB 1") is appended to this descriptive term to identify which was actually used out of the hundreds of deed books created since the 1696 establishment of the county. The third piece contains the specific page numbers and other details of the relevant record. This first section up through the semicolon contains all of the information we need to know about the source itself, which may be available in multiple formats.

The access information follows after the semicolon, and comprises a second "clause." We begin with the format type ("digital images"), as this ties the second clause back to the first clause, in much the same way as "however" or "although" might in a multi-clause narrative sentence. The format is unnecessary when viewing the original paper format.

Following the format type, the citation records the website where the digital images were located. Like the first half of the citation, it begins with the author of the website ("Maryland State Archives") and continues with the title and publication information. The place of publication for a website would be its URL, but there is no real "publisher" in the sense that a book has a

publisher. Also, the date of publication is not truly relevant because a website can be changed with no notice. Instead, we record the date of access. Using outside services like the *Wayback Machine* (www.archive.org) we can access cached copies of past incarnations of specific web pages, if necessary.

Citing in Our Writing

By collecting all of the relevant details about our sources throughout the course of our research, we begin the necessary process of source analysis. We use the same information to cite our sources. In our writings, our audience is able to go through the same process in reverse. By reviewing our source citations, our readers can identify what sources we used and begin the process of evaluating our conclusions by evaluating the quality of our sources.

In fact, this is part of why source citation is part of the Genealogical Proof Standard defined by the Board for Certification of Genealogists. No conclusion can be considered proved without adequate and accurate source citations, because research should be as reproducible as possible. By providing source citations, we allow readers to evaluate our sources and extend this evaluation to the rest of our written conclusions.



Michael Hait, CG, is a full-time professional genealogical researcher, writer, and lecturer. He has written case studies for several genealogical journals including the Maryland Genealogical Society Journal, the New York Genealogical and Biographical Record, and the National Genealogical Society Quarterly. In 2012 Michael won 1st prize in the National Genealogical Society Family History Writing Competition for his article "In the Shadow of Rebellions," exploring descendants of an enslaved woman living in 19th-century Maryland. Michael currently serves on the Board of Trustees of the Board for Certification of Genealogists (2013–2016). For more information, visit www.haitfamilyresearch.com.