

Who Counts as an Ancestor? Technological  
Advancement, Documentary Evidence, and  
Changing Genealogical Standards in American  
Lineage Societies, 1970 - 2020

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History With Genealogical Studies

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## **Declaration**

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## **Abstract**

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Since their nineteenth-century founding, American hereditary organizations have embodied what this thesis terms the paradox of democratic exclusion: the tension between institutions that celebrate patriotic heritage and democratic values while restricting membership through bloodline-based documentation requirements. Scholars, including Morgan, Weil, and Teachout, have examined how these organizations reinforced racial hierarchies and shaped nationalist identity, yet existing scholarship concentrates overwhelmingly on the period before 1970 and has not positioned hereditary organizations as one bounded subculture within a diverse genealogical landscape that includes African American, Jewish, Mormon, Indigenous, ethnic diaspora, and professional genealogical communities.

This thesis addresses a historiographical gap by posing five interconnected research questions that examine the period from 1970 to 2020. These questions investigate how generational transitions, economic resources, cultural movements around race and identity, genealogy-focused media, and the emergence of genetic genealogy collectively reshaped individual engagement with family history and institutional responses from lineage societies.

The research employs a mixed-methods design combining survey data from 1,164 participants, interviews with 37 genealogical practitioners and organization members, and comparative case studies of the National Society Daughters of the American Revolution (NSDAR) and the General Society of Mayflower Descendants (GSMD), drawing on organizational proceedings, archival records, published histories, and press coverage. The study extends preliminary findings from a 2018 Postgraduate Diploma dissertation that identified significant lag times in the propagation of genealogical corrections and inconsistent reviewer standards within a single hereditary organization.

The findings reveal that hereditary organizations function as a specific, bounded subculture within the broader genealogical ecosystem, operating through multiple overlapping mechanisms of inclusion and exclusion, including documentary privilege, economic barriers, and a persistent gap between national inclusion policies and local chapter practices. Member-level experiences of discrimination (14.0%) exceed chapter-level discrimination (8.1%), indicating that formal policy changes have not uniformly transformed organizational culture at the interpersonal level. At the same time, the evidence demonstrates genuine contemporary efforts toward inclusion that resist a simple characterization of these institutions as unchanged vestiges of nineteenth-century exclusion.

*Abstract*

The paradox of democratic exclusion persists, but its contemporary manifestations reflect institutional evolution rather than stasis. This thesis contributes to genealogical historiography by distinguishing between structural limitations inherent to bloodline-based membership and addressable barriers that organizations can work to mitigate, offering a framework that challenges both uncritical celebration and categorical condemnation. The findings carry broader implications for understanding how voluntary associations balance tradition and adaptation, how gatekeeping practices operate within organizations that claim democratic purposes, and how one influential genealogical subculture navigated a period of profound social and technological change in American society.

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## **Abbreviations and Glossary**

<b>Abbreviation</b>	<b>Full Form</b>
<b>AAHGS</b>	African American Historical and Genealogical Society
<b>AAUW</b>	American Association of University Women
<b>AG</b>	Accredited Genealogist (postnominal designation from ICAPGen)
<b>AHA</b>	American Historical Association
<b>APG</b>	Association of Professional Genealogists
<b>ASG</b>	American Society of Genealogists
<b>atDNA</b>	Autosomal DNA
<b>BCG</b>	Board for Certification of Genealogists
<b>BYU</b>	Brigham Young University
<b>CAR</b>	Children of the American Revolution
<b>CG</b>	Certified Genealogist (postnominal designation from BCG)
<b>DAC</b>	Daughters of the American Colonists
<b>DAR</b>	Daughters of the American Revolution (see NSDAR)
<b>DR</b>	Daughters of the Revolution
<b>DUV</b>	Daughters of Union Veterans
<b>eApps</b>	Electronic Applications
<b>FASG</b>	Fellow of the American Society of Genealogists
<b>FGP</b>	Five Generations Project (GSMD)
<b>FGS</b>	Federation of Genealogical Societies
<b>FHL</b>	Family History Library (Salt Lake City, Utah)
<b>FTDNA</b>	Family Tree DNA
<b>GEDCOM</b>	Genealogical Data Communication (file format for exchanging genealogical data)
<b>GenFed</b>	Genealogical Institute on Federal Records
<b>GG</b>	Governor General (GSMD)
<b>GPS</b>	Genealogical Proof Standard
<b>GRIP</b>	Genealogical Research Institute of Pittsburgh
<b>GRS</b>	Genealogical Research System (NSDAR)

*Abbreviations and Glossary*

<b>GSHA</b>	Genealogical Society of Hispanic America
<b>GSMD</b>	General Society of Mayflower Descendants
<b>HG</b>	Historian General
<b>ICAPGen</b>	International Commission for the Accreditation of Professional Genealogists
<b>IGI</b>	International Genealogical Index
<b>IODE</b>	Imperial Order Daughters of the Empire
<b>ISOGG</b>	International Society of Genetic Genealogy
<b>LDS</b>	Church of Jesus Christ of Latter-day Saints (Mormon Church)
<b>MAP</b>	Microfiche Archival Project
<b>MFIP</b>	Mayflower Families in Progress
<b>MIDS</b>	Mayflower Integrated Database System
<b>MLM</b>	Mayflower Lineage Match
<b>mtDNA</b>	Mitochondrial DNA
<b>NARA</b>	National Archives and Records Administration
<b>NEHGS</b>	New England Historic Genealogical Society
<b>NGS</b>	National Genealogical Society
<b>NSCDA</b>	National Society of Colonial Dames of America
<b>NSCD17C</b>	National Society Colonial Dames of the Seventeenth Century
<b>NSDAR</b>	National Society Daughters of the American Revolution (see DAR)
<b>PG</b>	President General (NSDAR)
<b>RG</b>	Registrar General
<b>ROOTS-L</b>	Early genealogy internet listserv
<b>SAR</b>	Sons of the American Revolution
<b>SIGs</b>	Special Interest Groups
<b>SLIG</b>	Salt Lake Institute of Genealogy
<b>SR</b>	Sons of the Revolution
<b>SUVCW</b>	Sons of Union Veterans of the Civil War
<b>TAG</b>	The American Genealogist (journal)
<b>TRB</b>	The Royal Bastards (hereditary society)
<b>UAINE</b>	United American Indians of New England

<b>UDC</b>	United Daughters of the Confederacy
<b>VG</b>	Volunteer Genealogist
<b>VIS</b>	Volunteer Information Specialist
<b>WDYTYA</b>	Who Do You Think You Are? (television program)
<b>Y-DNA</b>	Y-chromosome DNA

<b>Term</b>	<b>Definition</b>
<b>Approved Ancestors (or Patriots)</b>	Individuals verified in an organizational database as qualifying ancestors through whom applicants may claim membership in a hereditary organization.
<b>Bloodline Descent</b>	Biological descent from a specific ancestor, documented through vital records and other primary sources; the fundamental requirement for membership in hereditary organizations.
<b>Brick Wall</b>	A genealogical research obstacle where an ancestor's identity, parentage, or vital information cannot be determined despite exhaustive research efforts.
<b>Collateral Descent</b>	A genealogical relationship through a non-direct lineage, such as an uncle, aunt, or cousin of a direct ancestor. Some hereditary organizations accept collateral descent for membership eligibility.
<b>Dovetailing</b>	The genealogical process of merging one family lineage into another at their most recent common ancestor, connecting an applicant's personal research to a previously verified lineage.
<b>Family Group Sheet</b>	A standard genealogical form documenting a nuclear family unit, including parents, their marriage, and all known children with vital dates and places.
<b>Five Generations Project (FGP)</b>	A GSMD research initiative that documents the first five generations of descent from each Mayflower passenger, establishing verified lineages published in the Silver Books series.
<b>Genealogical Proof Standard (GPS)</b>	A set of five criteria established by the Board for Certification of Genealogists that guide researchers toward sound conclusions: reasonably exhaustive search, complete and accurate source citations, analysis and correlation of evidence, resolution of conflicting evidence, and a soundly reasoned written conclusion.

<b>Genealojunk</b>	The propagation of unverified or inaccurate genealogical information, typically through online family trees, databases, or published sources, can mislead researchers and contaminate lineage documentation.
<b>Genetic Genealogy</b>	The use of DNA testing (autosomal, Y-chromosome, or mitochondrial) to establish or confirm genealogical relationships, supplementing or challenging traditional documentary evidence.
<b>Hereditary Organization (Lineage Society, Heritage Organization)</b>	A membership organization requiring documented ancestral connections to specific historical events, periods, or populations. Academic historians tend to use "heritage organization" or "hereditary society," while members and genealogists more commonly use "lineage society."
<b>Lineal Descent</b>	Direct ancestral descent from parent to child, as distinguished from collateral relationships. Some hereditary organizations require lineal descent exclusively for membership eligibility.
<b>Mayflower Families (Silver Books)</b>	The authoritative published series documenting verified descendants of Mayflower passengers through at least five generations, produced by the GSMD's Five Generations Project and serving as the gold standard for Mayflower lineage documentation.
<b>One and the Same (Proof of)</b>	The GSMD's rigorous verification standard requiring documentation that connects each parent-child relationship in a lineage, establishing that the person in one record is the same individual referenced in another.
<b>Patriot Ancestor</b>	In NSDAR terminology, an individual who contributed to the cause of American independence during the Revolutionary War era (1774–1783) and through whom applicants may claim DAR membership.
<b>Personal Acceptability</b>	An informal membership criterion historically used by hereditary organization chapters to reject genealogically qualified applicants based on subjective social standards, including race, religion, social class, or personal relationships.
<b>Poison Ivy / Poison Leaves</b>	Metaphorical terms for inaccurate genealogical information embedded in family trees or databases that lead researchers to incorrect conclusions, contaminating subsequent research that relies on the erroneous data.

<b>Qualifying Ancestor</b>	An individual whose documented service, residence, or participation in a specific historical event or period makes their descendants eligible for membership in a particular hereditary organization.
<b>Sponsorship</b>	The requirement in many hereditary organizations that prospective members be recommended or endorsed by existing members serves both as a social networking mechanism and as a gatekeeping practice.
<b>Supplemental Application</b>	An application submitted by an existing member of a hereditary organization to document descent from an additional qualifying ancestor beyond the one established in their original application.
<b>Supplemental Line</b>	A lineage submitted by an existing member to a hereditary organization documenting descent from a qualifying ancestor not included in the member's original application.

## **Chapter 1 The Conjunction of Genealogy and Lineage Organizations**

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Growing up, going to cemeteries and learning family stories from my grandmothers was an everyday occurrence. At that time, I did not know that genealogy was a discipline people actively pursued. I assumed everyone could recite their lineage back many generations and knew their family history as intimately as I knew mine. My paternal grandmother told me I could join the Daughters of the American Revolution (DAR or NSDAR) and the Mayflower Society and that I should be proud of my heritage.<sup>1</sup> She explained that she herself had been unable to join those organizations because her family was Irish and German immigrants who arrived in the mid-1800s. My maternal grandmother, meanwhile, had been refused entry to a lineage society due to small-town politics.<sup>2</sup> She had a documented pedigree and was respected in her community, but small towns can be merciless. Later, these stories gave me an awareness that hereditary organizations operated according to complex social dynamics.

As a professional genealogist, I observe the genealogical community from multiple vantage points: as someone attempting to establish professional credibility, a researcher who experienced discrimination for being young and having young children, as an advocate for various communities within genealogy, and a witness to the assumptions and misunderstandings that surround both genealogical practice and lineage society membership. Experience as a staff genealogist at the National Society Colonial Dames of the Seventeenth Century (NSCD17C) provided direct insight into what prospective members believe constitutes adequate research and proof for family lineage. These experiences revealed gaps between expectations and institutional standards.

Personal perspectives as a lineage society member revealed a different dimension of the dynamics discussed above. It led to assumptions from those outside these organizations, simply because I belong to a hereditary organization. Including being told more than once that I “didn’t act like a racist.” Such encounters created interest in examining the relationship between genealogical practice and membership in lineage societies, particularly the gap between external perceptions of these organizations and the lived experience of contemporary membership.

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<sup>1</sup> This comment was referencing the General Society of Mayflower Descendants, GSMD.

<sup>2</sup> Academic historians, including Morgan, Weil, and Teachout, frequently employ “heritage organization” or “hereditary society” when discussing these institutions, situating them within broader discourses about historical memory and national identity. Genealogists and members of the organizations themselves more commonly use “lineage society,” a term that emphasizes the documented bloodline descent required for membership rather than the broader cultural work these organizations perform. This thesis uses both terminologies, though “lineage society” and “hereditary organization” appear more frequently to reflect the language employed by the communities under study and to maintain consistency with genealogical literature.

This interest led to my 2018 Postgraduate Diploma dissertation at the University of Strathclyde, “Family Mythology or a Proven Genealogy? Determining the Validity of a Lineage Society Application.”<sup>3</sup> That project analyzed fifty-six membership applications for the William White Mayflower lineage submitted to the NSCD17C between 1933 and 2018. I observed through the applications the gap between what applicants believed constituted adequate documentation and what organizational standards required.<sup>4</sup>

That research yielded findings that directly informed this thesis and extended the methodological approach across two major hereditary organizations, incorporating survey and interview data from over 1,200 participants, and examining the fifty years from 1970 to 2020 during which American genealogical practice underwent a fundamental transformation.

Ultimately, insider status shapes my access to research materials, organizational networks, and interpretive frameworks, and this must be acknowledged. Insiders possess knowledge that outsiders cannot easily acquire, including familiarity with organizational terminology, procedural norms, informal hierarchies, and the unwritten expectations that govern membership experience. Yet insider status also carries interpretive risks, including the potential to normalize problematic practices or to adopt defensive postures toward external criticism. This thesis attempts to leverage insider access while maintaining analytical distance, subjecting observations and interpretations to the same evidentiary standards applied to other historical claims.

However, outside perspectives remain essential to this research. The scholarly literature on hereditary organizations, produced largely by historians without links to these societies, provides critical frameworks for understanding how these institutions function within broader American culture. Throughout this work, I have attempted to make implicit institutional practices explicit and to explain specialized terminology that members take for granted but that outsiders may overlook.

### **1.1. Hereditary Organizations as One Genealogical Subculture**

American genealogical practice encompasses a diverse ecosystem of distinct communities, each with its own motivations, methodologies, institutional structures, and relationships to broader social and political contexts. Hereditary organizations such as the National Society Daughters of

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<sup>3</sup> Combs-Bennett, Shannon D. (2018) Family Mythology or a Proven Genealogy? Determining the Validity of a Lineage Society Application. Postgraduate Diploma Dissertation, University of Strathclyde.

<sup>4</sup> I was given permission by the President General at that time, Lesley Breaux, to use the archives for this study. Part of this agreement included giving them a copy of my findings for the library and presenting this topic at their annual conference.

the American Revolution (NSDAR) and the General Society of Mayflower Descendants (GSMD) represent one bounded subculture within this broader landscape, distinguished by their emphasis on documented bloodline descent from specific historical populations.<sup>5</sup> Understanding this positioning is essential for interpreting the findings presented throughout this thesis: patterns observed within hereditary societies cannot be generalized to the entire genealogical community, and the dynamics of bloodline-based membership organizations must be understood as one institutional form among many that Americans use to engage with family history.

Since 1970, American genealogical practice has diversified substantially. African American genealogical societies, including the Afro-American Historical and Genealogical Society, founded in 1977, developed sophisticated methodologies to overcome the documentary gaps left by slavery in the United States.<sup>6</sup> Jewish genealogical organizations, most prominently JewishGen, launched in 1987, navigate record destruction and diaspora research challenges while reconstructing fractured lineages.<sup>7</sup> Ethnic diaspora groups trace immigrant heritage among descendants of Swedish, Polish, Italian, and other European communities, often maintaining connections to ancestral homelands through genealogical research.<sup>8</sup> Regional genealogical societies organized around geographic rather than ethnic or hereditary criteria added further complexity to the field, assisting those interested in discovering their family history. Finally, professional genealogists serving many communities assist those whose genealogical objectives range from using DNA to discover new family lines to assisting with records for hereditary society membership.<sup>9</sup>

Each of these genealogical subcultures operates within its institutional structures and differing relationships to broader social contexts. Hereditary organizations constitute one genealogical subculture, characterized by formal verification processes, documented lineage-based membership criteria, and organizational investment in particular historical narratives. This thesis

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<sup>5</sup> Morgan, Francesca. (2021) *A Nation of Descendants: Politics and The Practice of Genealogy in U.S. History*. Chapel Hill, North Carolina: University of North Carolina Press. p. 28.

<sup>6</sup> Ross, Rodney A. (1985) Oral History Interview with James Dent Walker, March 27, 1985, at DAR Building, Washington, D.C. *National Archives Oral History Project*. <https://www.archives.gov/files/about/history/james-walker.pdf>: accessed 12 January 2024. AAHGS. (n.d.) About AAHGS. *African American Historical and Genealogical Society*. <https://www.aahgs.org/>: accessed 12 November 2024.

<sup>7</sup> JewishGen. (2025) Mission. *JewishGen, The Global Home for Jewish Genealogy*. <https://www.jewishgen.org/JewishGen/Mission.html>: accessed 2 September 2025.

<sup>8</sup> Weil, François. (2013) *Family Trees: A History of Genealogy in America*. Cambridge, Mass.: Harvard University Press. pp. 134–135. Weil documents how descendants of German, Huguenot, Scotch, Swedish, Irish, and German Jewish immigrants used genealogy to counter Anglo-Saxon dominance in American identity narratives. See also Jacobson, Matthew Frye. (2006) *Roots Too: White Ethnic Revival in Post-Civil Rights America*. Cambridge, Mass.: Harvard University Press. pp. 2, 4. Jacobson analyzes how the post-Civil Rights ethnic revival generated widespread genealogical interest among white ethnic communities, fueled by publishing, television, and institutional support that operated through commercial rather than hereditary channels.

<sup>9</sup> Mills, Elizabeth Shown. (2003) Genealogy in the “Information Age:” History’s New Frontier? *National Genealogical Society Quarterly*. 91(4). pp. 271–274. Mills distinguishes between “family tree climbers,” “traditional genealogists,” and “generational historians,” arguing that professional genealogical practice constitutes a distinct scholarly discipline with its own evidentiary standards. See also Mills, Gary B. and Mills, Elizabeth Shown. (1991) Editors’ Corner: Genealogy’s “Initials” — What Do They Really Stand For? *National Genealogical Society Quarterly*. 79(1). p. 3.

focuses specifically on the hereditary organization subculture, not because it represents genealogical practice broadly, but precisely because its distinctive characteristics, bloodline documentation requirements, membership criteria, and institutional structures illuminate tensions between democratization claims and access limitations that merit scholarly examination.

The choice to study hereditary organizations alongside the broader genealogical community reflects the interconnected nature of these populations. Many individuals who participate in hereditary organizations also engage with genealogical societies, professional development opportunities, and online genealogical platforms. The survey data collected for this research reached participants primarily through networks centered on hereditary organizations and their associated genealogical communities, meaning that the findings should be understood as illuminating patterns within this subculture rather than as universal insights into genealogical practice.<sup>10</sup> Where comparative data exists, this thesis draws on existing scholarship to situate hereditary organization practices alongside other genealogical communities, but original extensive research on other genealogical subcultures falls outside the scope of this investigation.

## **1.2. The Social Architecture of Genealogical Belonging**

Understanding how genealogy shapes personal identity requires examination of the theoretical frameworks that explain kinship, relatedness, and belonging. As Francesca Morgan observes, culture plays a critical role in how genealogical relatedness is theorized and measured; the social logic of reckoning such relatedness is quite distinct from the biological reality it supposedly reflects, and often overrides it.<sup>11</sup> Similarly, Eviatar Zerubavel reinforces this position, arguing that relatedness is not a biological given but a social construct shaped by interpretive frameworks that organize historical evidence into meaningful patterns of kinship.<sup>12</sup> He argues that genealogies are more complicated than they initially appear: they are not simply records of personal history but narratives that people construct to connect themselves to the past by confirming long-dead persons as their ancestors.<sup>13</sup> When individuals trace their ancestry to Revolutionary War soldiers or Mayflower passengers, they engage in an interpretive process that transforms historical documentation into meaningful kinship claims. This constructivist perspective reveals how genealogical researchers elongate pedigrees to “out past” others who

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<sup>10</sup> Survey methodology limitations are discussed fully in Chapter 4.

<sup>11</sup> Morgan (2021) *op. cit.* p. 9.

<sup>12</sup> Zerubavel, Eviatar. (2012) *Ancestors and Relatives: Genealogy, Identity, and Community*. Oxford: Oxford University Press. pp. 9–10. For broader anthropological frameworks on kinship construction beyond biological determinism, see also Carsten, Janet. (2004) *After Kinship*. Cambridge: Cambridge University Press.

<sup>13</sup> Zerubavel. *op. cit.* p. 10.

can document their families for shorter periods, allowing those with more extensive pedigrees to claim greater legitimacy for their ancestral claims.<sup>14</sup>

These related practices contribute to a sense of belonging that extends across temporal and spatial boundaries. Anne-Marie Kramer argues that making deep and meaningful connections with others allows a sense of belonging to emerge, achieved by creating and maintaining connections to shared histories, associated people, and places.<sup>15</sup> Genealogical research provides valuable resources for establishing these connections, enabling individuals to position themselves within networks of relatedness across generations and geographic locations. American lineage societies demonstrate these dynamics: organizations bring members together through shared genealogical connections to a person, event, or era, creating networks of individuals over large geographic areas and often through multiple generations of the same family.

Carolyn Strange, drawing on David Hollinger's concept of "the will to descend," examines how communities claim politically potent artifacts for contemporary descent communities, driven by impulses that extend beyond the simple desire for impressive ancestors.<sup>16</sup> This concept is evident in genealogical research and lineage societies, where participants collect documentary evidence to prove their lineage, often tying the community to a common cultural origin or ancestry. Strange's framework illuminates how hereditary organizations function not merely as gatekeeping institutions but as communities of practitioners united by shared investment in particular historical narratives and documentary practices.

Conversely, Zerubavel's concept of genealogical "stretching" demonstrates how genealogical narratives function beyond establishing legitimacy or prestige.<sup>17</sup> Stretching becomes evident when examining how various social classes use these narratives to advance their social standing. Hereditary societies exemplify how it is far more prestigious to be a tenth-generation than a first-generation American, explaining why nativists frequently look down on recent immigrants.<sup>18</sup> While elevating perceived social status is one reason Americans choose to trace their genealogy, motivations extend well beyond status-seeking. They frequently include curiosity, connection to family traditions, documentation of community histories, and resolution of family mysteries.<sup>19</sup>

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<sup>14</sup> Zerubavel. *op. cit.* p. 80.

<sup>15</sup> Kramer, Anne-Marie. (2011) Kinship, Affinity and Connectedness: Exploring the Role of Genealogy in Personal Lives. *Sociology*. 45(3). pp. 384–386, 389. <https://www.jstor.org/stable/42857574>: accessed 16 October 2020.

<sup>16</sup> Strange, Carolyn. (2014) Sisterhood of Blood: The Will to Descend and the Formation of the Daughters of the American Revolution. *Journal of Women's History*. 26(3). pp. 108, 121. <https://doi.org/10.1353/jowh.2014.0052>: accessed 16 October 2020. Strange applies Hollinger's concept to the DAR's formation, arguing that patriotic genealogical societies narrated a compelling interpretation of U.S. history that was simultaneously inclusive and elitist, democratic and demonstrably exclusionary.

<sup>17</sup> Zerubavel *op. cit.* pp. 24–25, 80.

<sup>18</sup> Zerubavel *op. cit.* p. 80.

<sup>19</sup> See survey findings presented in Chapters 5 and 7.

Modernly, establishing lineage connections serves personal and psychological needs for stability in an increasingly fractured social landscape. Lineage societies can represent institutionalized forms of a universal human tendency to seek connections with a legitimizing past, explaining their persistence despite contemporary challenges from genetic research and social change. This theoretical framework demonstrates the interplay between individual identity formation and lineage verification processes, particularly as genetic genealogy introduces new forms of evidence that challenge traditional documentation methodologies while creating new possibilities for establishing ancestral connections.

### **1.3. Genealogy's Academic Terrain**

Genealogy occupies an ambiguous position within academic discourse, situated between popular hobbies and scholarly disciplines. This ambiguity shapes how academics have approached the study of genealogical practice and the institutions that regulate it, including the hereditary organizations examined in this thesis. Understanding this scholarly terrain is essential for positioning the present research, as the questions scholars ask about genealogy and the assumptions embedded in those questions directly influence which aspects of hereditary organizations receive attention and how findings are interpreted.

The tension between democratized access and methodological rigor lies at the heart of contemporary debates about genealogical practice. As James W. Cortada observes, genealogical research presents distinctive methodological challenges precisely because there is no requirement for training or licensure to call oneself a “genealogist.” Without institutional oversight and required professional training, errors in data collection lead to incorrect assumptions about family relationships that, in turn, may persist for generations.<sup>20</sup> This observation captures a fundamental tension that runs through genealogical practice: the same accessibility that allows millions of Americans to engage with their family histories also permits the circulation of poorly documented claims that more rigorous gatekeeping might prevent. Hereditary organizations occupy a peculiar position within this tension, functioning as gatekeepers who impose documentation standards on applicants while simultaneously relying on research conducted by applicants, often without formal training. The 2018 research that preceded this thesis revealed this dynamic precisely: applicants submitted documentation they believed adequate, while reviewers with varying levels of expertise evaluated those submissions against standards that themselves evolved.

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<sup>20</sup> Cortada, James W. (2011) Genealogy as a Hobby. In: Aspray, William and Hayes, Barbara M. (eds.) *Everyday Information*. Cambridge, MA: MIT Press. pp. 160, 168–169.

The relationship between professional genealogists, amateur family historians, and academics reflects broader tensions in the production and validation of historical knowledge that have shaped American intellectual life since the nineteenth century. Robert M. Taylor Jr. and Ralph J. Crandall note that before the Civil War, genealogist, biographer, historian, and antiquarian were often the same person, rendering discussion about differences between genealogy and history largely moot.<sup>21</sup> A single individual might compile family pedigrees, write biographical sketches of notable ancestors, preserve local historical records, and contribute to broader historical narratives without perceiving these activities as fundamentally distinct enterprises. This unity fractured during the late nineteenth century as historical writing professionalized and split into increasingly separate domains: local history became associated with antiquarian societies and amateur enthusiasts; genealogy developed its own institutional infrastructure through hereditary organizations and family associations; and “history proper” became increasingly associated with university education, doctoral training, and academic employment.<sup>22</sup> The consequences of this fragmentation persist in the United States to today, with genealogists often marginalized within academic history departments despite the apparent relevance of family history research to social, demographic, and cultural historical questions.

Genealogy’s multidisciplinary character further complicates its scholarly positioning. A single genealogical research project might draw upon demography, genetics, history, sociology, geography, and information science, among other fields.<sup>23</sup> Thomas W. Jones and Melinde Lutz Sanborn argue that genealogy meets the criteria for disciplinary status because practitioners advance knowledge through methodologically grounded research, subject their findings to peer review, publish in specialized journals, and teach the next generation of practitioners.<sup>24</sup>

Elizabeth Shown Mills noted in 2002 that the skills, analytical principles, knowledge base, and standards of genealogical practice were not then obtainable through any traditional university-based academic program, suggesting that genealogy had not yet achieved full disciplinary recognition.<sup>25</sup> However, the relationship between genealogy and the academy is more complex than Mills’s observation alone suggests. Brigham Young University (BYU) has offered a bachelor’s degree in family history since 1979, though its position at a religiously affiliated

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<sup>21</sup> Taylor, Robert M. Jr. and Crandall, Ralph J. (1986) *Historians and Genealogists: An Emerging Community of Interest*. In: Taylor, R.M. Jr. and Crandall, R.J. (eds.) *Generations and Change*. Macon, GA: Mercer University Press. p. 15.

<sup>22</sup> Taylor and Crandall *op. cit.* pp. 15–16.

<sup>23</sup> Hershkovitz, Arnon. (2011) Leveraging genealogy as an academic discipline. *Avotaynu*, 27(3), pp. 18–23. <https://avotaynuonline.com/2016/09/leveraging-genealogy-academic-discipline/>: accessed 14 August 2024. See also Hershkovitz, Arnon. (2012) ‘A suggested taxonomy of genealogy as a multidisciplinary academic research field,’ *Journal of Multidisciplinary Research*, 4(3), pp. 5–21. Hershkovitz developed a taxonomy comprising six interconnected components (people, families, communities, representations, data, and what he terms a “bird’s-eye view”) that distinguishes genealogical study from contributing disciplines because genealogists necessarily synthesize findings across multiple domains rather than working within a single disciplinary framework.

<sup>24</sup> Jones, Thomas W. and Sanborn, Melinde Lutz. (2010) Editors’ Corner: Genealogy as Academic Discipline. *National Genealogical Society Quarterly*. March. 98(1), p. 3.

<sup>25</sup> Mills, Elizabeth Shown. (2002) Editor’s Corner: Rethinking Genealogical Education. *National Genealogical Society Quarterly*. June. 90(2), p. 83.

institution with a doctrinal mandate for genealogical research has made it an exception rather than evidence of broader academic acceptance.<sup>26</sup> At the graduate level, the University of Strathclyde's Genealogical Studies Institute, which offers postgraduate certificates, diplomas, and master's degrees combining historical methodology with genealogical research training, represents the continued evolution of academic genealogical education in the twenty-first century as one of a small number of institutions worldwide to offer graduate-level credentials in the field.<sup>27</sup> Scholarly work, such as this thesis, contributes to that evolution by applying rigorous historical and social scientific methods to questions about genealogical institutions that have received insufficient scholarly attention.

Hereditary organizations emerged during precisely this period of disciplinary fragmentation, and their founders understood their work as bridging what academic professionalization was pulling apart. The scholarly literature that has developed around these organizations, however, has not formed a single unified conversation. Historians, cultural theorists, and critical scholars have approached American genealogical institutions from different disciplinary traditions, producing analyses that sometimes build directly upon one another and sometimes operate in parallel with little mutual engagement. Understanding the shape of this historiographic landscape, where scholars agree, where they diverge, and where they talk past one another, is essential for positioning the present research.

#### 1.4. Critiques and Paradoxes in Genealogy

The most sustained scholarly dialogue concerns the institutional origins and social functions of hereditary organizations, a conversation that has grown progressively more critical over time. Woden Sorrow Teachout's dissertation on the formation of hereditary societies from 1876 to 1898 established the foundational analysis of how these organizations emerged and what cultural work they performed.<sup>28</sup> Teachout demonstrated that nineteenth-century hereditary groups envisioned genealogy, local history, and national history as intricately intertwined rather than separate enterprises. Ellen Hardin Walworth, a founding member of the NSDAR, articulated this vision explicitly when she observed that "Genealogy is the handmaid of history. The value of general history depends largely on the truth of local history, and local records

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<sup>26</sup> Brigham Young University (n.d.) History of Family History at BYU. <https://familyhistory.byu.edu/about>; accessed 20 July 2025. See also Brigham Young University (n.d.) Family History. *Department of History*. <https://history.byu.edu/family-history>; accessed 20 July 2025. That Mills could still characterize genealogical skills as unobtainable through traditional university programs more than two decades after BYU launched its bachelor's degree underscores the extent to which BYU's program existed as an exception rather than evidence of broader academic acceptance.

<sup>27</sup> Appendix 2 holds a list of degree programs in genealogy

<sup>28</sup> Teachout, Woden Sorrow. (2003) *Forging Memory: Hereditary Societies, Patriotism and the American Past, 1876–1898*. PhD Dissertation, The History of American Civilization, Harvard University. pp. 112–113, 118–119, 133. <https://www.proquest.com/scholarly-journals/forging-memory-hereditary-societies-patriotism/docview/223310387/se-2>; accessed 14 September 2021.

begin in the family.”<sup>29</sup> This formulation positioned genealogical research not as a hobby separate from serious historical inquiry but as the foundation upon which broader historical understanding must rest. The documentary collections assembled by organizations, membership applications, supporting documentation, and compiled genealogies were understood as contributions to historical knowledge that professional historians would eventually draw upon. Whether this vision was realized, and whether organization archives have in fact contributed to broader historical scholarship, remain questions this thesis addresses by examining how these collections have been used and valued over the fifty-year study period.

Teachout also identified what she called the “seemingly impossible paradox of American patriotic hereditary societies”: organizations that claimed democratic values while organizing around an inherited bloodline.<sup>30</sup> Her analysis documented how these organizations responded to the paradox primarily through their own self-understanding, emphasizing the breadth of potential eligibility rather than the narrowness of actual membership. Sons of the American Revolution (SAR) founder, William McDowell, claimed in 1892 that “about one-half the women of America ... are eligible to membership,” and a Georgia statistician calculated that there should be nearly five billion living descendants of Revolutionary patriots 1893, a total that exceeded the national population several times over.<sup>31</sup> These claims of broad accessibility operated as rhetorical defenses against charges of aristocratic exclusion, and Teachout presented them primarily as the organizations understood them: sincere assertions of democratic purpose rather than deliberate obfuscation.

François Weil’s *Family Trees: A History of Genealogy in America*, published a decade after Teachout’s dissertation, built upon and significantly broadened this institutional analysis.<sup>32</sup> Where Teachout focused specifically on hereditary societies during their founding period, Weil situated these organizations within the larger trajectory of American genealogical practice, tracing its development along a path that diverged significantly from European traditions. This wider lens revealed something that Teachout’s narrower institutional focus had not fully elaborated: the degree to which the documentary practices of hereditary organizations functioned as mechanisms of social stratification beyond their founders’ stated intentions. Weil demonstrated that genealogical practice during the formative period systematically favored those who possessed wealth sufficient to pursue research, education adequate to interpret historical records, and leisure time to devote to what remained an unpaid avocation. The populations best positioned to meet these requirements were middle- and upper-middle-class

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<sup>29</sup> Walworth, Ellen Hardin. Quoted in Teachout. *op. cit.* p. 119.

<sup>30</sup> Teachout, *op. cit.* p. 128.

<sup>31</sup> Teachout, *op. cit.* pp. 129–130. The calculation was originally published in “Address by Rev. Rollin A. Sawyer, D.D.” *Magazine of the Daughters of the Revolution*. 1 (1893), p. 31. The precise figure given was 4,870 million living descendants against a national population of approximately sixty million.

<sup>32</sup> Weil (2013) *op. cit.* pp. 3–6, 112, 129–131.

white Americans, particularly women excluded from professional employment, who came to dominate both hereditary organizations and the broader genealogical community, which persisted well into the twentieth century.<sup>33</sup> Weil's analysis thus reframed the question Teachout had posed: the paradox of democratic exclusion was not merely a matter of rhetorical tension between democratic ideals and hereditary requirements, but a structural feature embedded in the documentary practices themselves. Weil's work establishes historical foundations upon which this thesis builds, though his analysis extends only to the early twenty-first century and does not address the full scope of technological and cultural transformation that reshaped genealogical practice during the period examined here.

Francesca Morgan's *A Nation of Descendants: Politics and the Practice of Genealogy in U.S. History* extended and deepened both predecessors' work, pushing the analysis further in a political direction.<sup>34</sup> Morgan engaged directly with the institutional history that Teachout documented and the social stratification that Weil identified. Still, she argued more forcefully that genealogical practice in America has consistently reinforced both formal and informal social hierarchies, not incidentally, but constitutively. Where Weil had shown that documentary practices favored certain populations, Morgan demonstrated that private organizations, such as hereditary societies, used genealogical documentation to sharpen social boundaries, actively distinguishing between those who could prove descent from valued ancestors and those who could not, or would not, be permitted to try.<sup>35</sup>

Morgan's research revealed that hereditary organizations provided the primary institutional framework through which many Americans first engaged in formal, public genealogical activity during the late nineteenth and early twentieth centuries, attracting particularly women excluded from other professional pursuits who found in genealogical research an acceptable outlet for intellectual ambition, families seeking social distinction in an era of rapid industrialization and immigration, and descendants of non-English colonial settlers asserting their own claims to American belonging.<sup>36</sup> Morgan's work illuminates the political dimensions of genealogical practice and the ways tracing ancestry has served to include some Americans while excluding others, a theme this thesis examines through contemporary case studies. Her analysis provides essential context for understanding why hereditary organizations developed as they did, even as this thesis questions whether the patterns she documents in historical sources persist unchanged into the contemporary period.

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<sup>33</sup> Weil (2013) *op. cit.* pp. 134–141.

<sup>34</sup> Morgan (2021) *op. cit.* pp. 1–2.

<sup>35</sup> Morgan (2021) *op. cit.* pp. 2–4.

<sup>36</sup> Morgan (2021) *op. cit.* pp. 28–34, 43.

Teachout, Weil, and Morgan form an intellectual progression from documentation of founding tensions through broader social history to explicitly political analysis, each successive work adopting a more critical stance toward the organizations under study.<sup>37</sup> This progression shapes the scholarly expectations any new study of hereditary organizations must navigate, and this thesis engages with all three scholars' findings while also testing their historical conclusions against contemporary research.

On the other hand, Adam Hjorthén's critical analysis of what he terms the "paradigm of democratization" in genealogical studies introduced a different kind of challenge, one directed not at the organizations themselves but at the scholarly literature about them.<sup>38</sup> Writing after Weil and Morgan, Hjorthén argued that scholars studying genealogy have too readily accepted narratives of democratization. He contended that researchers have not examined critically enough how the democratization framework obscures fundamental questions about power. Particularly, questions on how commercial interests, religious institutions, and organizational structures capitalize on ancestral longing, while the role of these powerful actors in shaping the genealogical landscape remains analytically invisible. His concept of "the capitalization of longing" proposed that rather than emanating organically from grassroots participants, the expansion of genealogical practice has been driven substantially by organizations, businesses, and media seeking to profit, whether economically, socioculturally, or religiously, from people's desire for ancestry. His critique applied, in varying degrees, to elements present across the preceding scholarship.

Weil's narrative of genealogical practice expanding through technological innovation and commercial platforms contained aspects of the democratization story Hjorthén challenged. Morgan documented exclusionary practices but still framed the post-1970 period partly as one of expanding access. Hjorthén work pushes researchers to ask more pointedly who benefits from claims that genealogy has become democratic, what interests such claims serve, and what the uncritical adoption of democratization as an analytical lens fails to reveal about the concentration of power in genealogical infrastructure.

This thesis responds directly to Hjorthén's call by subjecting democratization claims to analysis through contemporary organizational data. The paradox of democratic exclusion emerges from precisely the tension Hjorthén identified: organizations may genuinely believe they have democratized while structural features of their operations continue to produce uneven outcomes. At the same time, Hjorthén's framework must itself be applied with care. His critique,

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<sup>37</sup> The Teachout, Weil, Morgan progression is important to acknowledge because it shapes the scholarly expectations any new study of hereditary organizations must navigate.

<sup>38</sup> Hjorthén, Adam. (2022) Reframing the history of American genealogy: on the paradigm of democratization and the capitalization of longing. *Genealogy*, 6(1), pp. 1–17. <https://doi.org/10.3390/genealogy6010021>; accessed: 15 June 2023.

developed primarily through analysis of The Church of Jesus Christ of Latter-day Saints (commonly known as Mormons or the LDS Church) institutional genealogy and situated within a broader landscape of commercial genealogical enterprise, does not account for the possibility that some organizations have undertaken substantive reforms in response to external pressure and internal evolution. The question of whether apparent democratization represents genuine structural change or rhetorical accommodation is treated in this thesis as an empirical matter rather than a foregone conclusion.

Moving into the digital world, Julia Creet's *The Genealogical Sublime* approaches genealogical practice through a different analytical lens, examining how the genealogical industry's technological infrastructure and institutional actors have shaped contemporary family history research.<sup>39</sup> Working from a background in cultural analysis, Creet traces the histories of the largest genealogical databases, from the Mormon Church's vast archival enterprise, Ancestry.com's commercial platform, and direct-to-consumer genetic testing, to construct a broader history of genealogy as an industry. Her concept of the "genealogical sublime" describes the overwhelming drive toward, often obsessive, completeness that these technologies enable. Creet's analysis reinforces and extends Hjorthén's concerns about the capitalization of ancestral longing, demonstrating how commercial enterprises, religious institutions, and database technologies have not merely facilitated genealogical research but have actively shaped the terms on which millions of people engage with their family pasts.

Although these scholars have collectively examined the broader genealogical landscape, commercial platforms, religious institutions, and general genealogical culture, none has undertaken sustained empirical research into how contemporary hereditary organizations function as bounded communities with distinctive membership structures, documentary standards, and internal cultures that differ markedly from the broader genealogical ecosystem. This thesis engages with the structural questions Weil, Morgan, Hjorthén, and Creet raise about access, exclusion, and institutional power. By combining insider access with mixed-methods empirical research conducted within these organizations, this thesis connects the broader historiographic conversation about American genealogy to the specific institutional practices of the hereditary subculture.

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<sup>39</sup> Creet, J. (2020) *The genealogical sublime*. Amherst: University of Massachusetts Press.

## 1.5. Positioning This Research Within Literature

The historiographic conversation outlined above establishes crucial foundations for understanding hereditary organizations while leaving a significant temporal and methodological gap that this thesis addresses. Teachout's analysis ends in 1898, before the organizations studied had fully consolidated their institutional forms. It does, however, document the early evolution of lineage societies, including the DAR which has the largest name recognition within the American society and other heritage organizations, making it the most studied organization.

Carolyn Strange's examination of the DAR's early genealogical controversy concerning lineal versus collateral descent, a debate about whether membership should be restricted to direct ancestors in an unbroken generational chain or could extend to those descended from siblings of Revolutionary ancestors, complements Teachout's broader survey by revealing how membership criteria solidified in ways that continue to influence contemporary practice.<sup>40</sup> The controversy, which Strange termed "the battle over blood," was resolved at the DAR's third Congress in 1894 when delegates voted to require strict lineal descent, aligning the organization with other hereditary societies and establishing the genealogical standard that persists today.

Continuing with this thread, Simon Wendt's study of the DAR's twentieth-century history extends the analysis, arguing that the organization's commemorative activities actively reinforced racial and gender hierarchies by deliberately shaping historical memory, even as it voiced support for inclusive civic nationalism.<sup>41</sup> Wendt's critical framing provides context for understanding how these organizations operated during most of the twentieth century. Though, as this thesis demonstrates through contemporary data, the question of whether such patterns persist, have been substantively reformed, or have been replaced by different dynamics requires the kind of sustained organizational analysis that Wendt's focus on memory and commemoration does not undertake. Furthermore, Morgan's broad survey of American genealogical practice necessarily limits the depth with which she can examine any individual organization.

None of these scholars have conducted a sustained examination of how hereditary organizations evolved during the period from 1970 to 2020, when technological change, legal challenges, and shifting social expectations most directly reshaped the landscape in which these organizations operate. This thesis addresses that historiographic gap by examining how hereditary organizations and genealogy navigated the cultural transformations of this half-century. Particularly, the post-*Roots* genealogical boom brought new participants into research, the rise

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<sup>40</sup> Strange, *op. cit.* pp. 112–115.

<sup>41</sup> Wendt, S. (2020) *The Daughters of the American Revolution and patriotic memory in the twentieth century*. Gainesville: University Press of Florida. pp. 163-164.

of identity politics across the political spectrum, the aftermath of the civil rights movement, the technological revolution, and the emergence of DNA testing as a new form of genealogical evidence.

A further gap concerns the relationship between scholarly analysis and contemporary organizational practice. The progression from Teachout through Morgan has produced increasingly critical readings of hereditary organizations, grounded in accurate and important documentation of historical exclusionary practices. Yet scholarship focused primarily on historical exclusions risks treating those patterns as permanent features rather than as practices that organizations may have modified, whether voluntarily or under external pressure, in response to changing social expectations. This thesis examines contemporary organizational practices that neither assume hereditary organizations have fully transcended their exclusionary origins nor presume that historical patterns persist unchanged. The question of continuity and change is treated as a matter to be investigated rather than a conclusion to be assumed.

Research revealed that scholars focusing on the nineteenth and early twentieth centuries accurately document historical exclusionary practices through explicit racial restrictions that barred many from membership regardless of documentation qualifying the person for membership, “personal acceptability” standards that permitted chapters to reject applicants for subjective reasons unrelated to genealogical qualification, and documentary requirements that systematically advantaged populations whose ancestors left extensive paper trails while disadvantaging those whose forebears’ contributions went unrecorded. The evidence collected for this thesis, however, demonstrates that contemporary organizations have undertaken significant efforts to address these historical limitations through publications documenting the involvement of underrepresented populations, the development of specialized research guidance for those facing documentary challenges, and active efforts to recruit more diverse membership. Whether these contemporary efforts represent fundamental institutional transformation or surface-level rhetorical accommodation to external pressure constitutes a question that this thesis examines.

## **1.6. The Paradox of Democratic Exclusion**

A central tension in hereditary organizations is the apparent contradiction between their rhetoric, which often celebrates democratic values, and their membership structures predicated on bloodline. Contemporary observers recognized this tension immediately upon the founding of these organizations. Critics as early as the 1790s argued that organizations grounded in ancestry were fundamentally incompatible with democratic principles, which presumed social rather than biological bases for community membership and recognized individuals rather than

family lines as the basic units of civic participation.<sup>42</sup> Hereditary societies responded by insisting their requirements were broadly accessible to most native-born Americans and that their purposes were patriotic, not aristocratic.<sup>43</sup>

This thesis employs the concept of the “paradox of democratic exclusion” to describe the fundamental contradiction embedded in these organizations, which often base membership on bloodline documentation, economic resources, and social acceptability. As Karla Hackstaff observes, genealogical practices have the potential to democratize collective memory and reveal social injustices, yet the organizations examined in this study have historically functioned to validate certain lineages while excluding others.<sup>44</sup> The tension between these possibilities, genealogy as a democratizing force versus genealogy as an exclusionary mechanism, runs throughout the period examined. Three analytical distinctions prove essential for this examination.

First, the distinction between structural limitations and addressable barriers. Hereditary organizations maintain membership criteria requiring documented biological descent from specific historical populations. This structural feature necessarily excludes individuals who cannot document such descent, regardless of their commitment to organizational values, their ancestors’ rumored contributions, or lack of documentation, most often due to record destruction. These structural limitations differ from addressable barriers, such as economic costs, geographic access, or subjective “personal acceptability” standards, which organizations can modify through policy changes and cultural transformation.

Second, the distinction between historical exclusionary practices and contemporary organizational efforts. The historical record frequently documents racial restrictions, subjective rejection of qualified applicants, and documentary requirements designed to exclude. The contemporary record reveals organizational initiatives to address these limitations. Whether contemporary efforts constitute genuine transformation or rhetorical repositioning was a goal of this thesis.

Third, the distinction between national policies and local practices. Frequently, hereditary organizations operate through federated structures with substantial chapter autonomy.<sup>45</sup>

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<sup>42</sup> Teachout, *op. cit.* p. 128.

<sup>43</sup> Teachout, *op. cit.* pp. 129–130.

<sup>44</sup> Hackstaff, Karla B. (2010) Family Genealogy: A Sociological Imagination Reveals Intersectional Relations. *Sociology Compass*. 4(8). p. 667. <https://www.researchgate.net/publication/240664840>: accessed 13 December 2021.

<sup>45</sup> Both case study organizations exhibit federated governance. The NSDAR operates through approximately 3,000 local chapters organized under state-level structures, with national leadership setting policy through annual Continental Congress proceedings while chapters retain significant autonomy in membership sponsorship, programming, and activities. The GSMD’s decentralized “bottom-up model” grants significant autonomy to state societies, as discussed in Chapter 9. The Ferguson case, examined in Chapter 8, illustrates the practical consequences of this structure: national leadership offered at-large membership while the local Mary Washington chapter maintained its exclusionary stance, demonstrating how gaps between national policy and local practice operate within federated governance. See Chapters 8 and 9 for a detailed analysis of both organizations’ governance structures.

National leadership may adopt inclusive policies that local chapters implement unevenly, creating gaps between formal organizational commitments and member experiences. This thesis examines both institutional policy evolution and ground-level membership dynamics to understand how the paradox of democratic exclusion operates in practice.

The resolution to this paradox lies partly in distinguishing between two meanings of “democratic.” Hereditary organizations operate democratically within their bounded membership through voting, elections, chapter autonomy, and participatory governance structures. Members elect leadership at local, state, and national levels leading to chapters exercising considerable autonomy in programming and activities, allowing organizational policies to emerge through representative processes. However, this internal democracy operates within membership boundaries established by genealogical criteria rather than open admission. This distinction parallels other membership organizations that combine entry criteria with internal democratic governance. For example, professional associations that require credentials for membership, yet operate democratically among members.<sup>46</sup>

### **1.7. Economics, Politics, and Institutional Transformation**

The study of genealogy has expanded dramatically since 1970, representing an understudied aspect of contemporary society. By 2012, genealogy had evolved from a niche pursuit into a billion-dollar industry, with Ancestry.com alone reporting \$1 billion in revenue that year before being acquired by the European private equity firm Permira for \$1.6 billion.<sup>47</sup> As Ancestry.com CEO Tim Sullivan observed at the time of the acquisition, the platform had attracted more than two million paid subscribers, reflecting a broad, mainstream interest in family history.<sup>48</sup> This transformation from an exclusive social pursuit to a mass-market industry fundamentally altered the context in which hereditary organizations operated, creating both new resources for genealogical research and new competitive pressures from commercial platforms whose interests may not align with accepted documentary standards.

Budget constraints have historically impacted open access to genealogical records. Under the Reagan administration, budget cuts to the National Archives and Records Administration (NARA) resulted in approximately \$250,000 in savings, the elimination of 17 positions, and the

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<sup>46</sup> See Chapter 7 for an extended discussion of this distinction.

<sup>47</sup> Farnham, Alan. (2012) Who’s your daddy? Genealogy becomes \$1.6B hobby. *ABC News*. <https://abcnews.go.com/Business/genealogy-hot-hobby-worth-16bmormons/story?id=17544242>: accessed 20 October 2020; Ancestry (2012) Permira Funds complete acquisition of Ancestry.com. *Ancestry Corporate*. <https://www.ancestry.com/corporate/newsroom/press-releases/permira-funds-complete-acquisition-ancestrycom>: accessed 5 September 2024).

<sup>48</sup> *Ibid.*

discontinuation of the microfilming of census records for repositories.<sup>49</sup> These patterns of reduced financial support for historical repositories have persisted. In 2019, T.J. Stiles reported that NARA was once again in a budget crisis, pleading that congressional action was necessary to preserve access to essential historical records.<sup>50</sup> For genealogists specifically, reduced archival access compounds the documentary challenges that already limit participation in hereditary organizations, as applicants who cannot access records cannot establish the genealogy these organizations require.

A significant development during the 1970–2020 period that has not yet been sufficiently addressed in genealogical scholarship is the rise in partisanship, political polarization, and identity politics across the American political spectrum. Hereditary organizations, with their celebration of heritage and patriotism, frequently navigate this politically charged terrain, which influences their internal cohesion and public perception. Survey and interview data collected for this research reveal that political identity has become a significant factor in how members experience organizational participation. These patterns reflect what Finkel and colleagues identify as “political sectarianism,” a form of social sorting in which political identity functions as a primary filter for association and trust in contemporary American society.<sup>51</sup> Whether partisan polarization has strengthened or weakened hereditary organizations’ institutional position remains an open question that this thesis addresses through systematic analysis of both survey data and participant testimony.

The technological transformation of genealogical research methods since the late 1990s has created additional institutional challenges and opportunities. Jerome De Groot observed that commercial platforms like Ancestry.com have enabled the public to circumvent professional and academic historians entirely, while simultaneously creating new dependencies on commercial repositories whose data practices, algorithmic modeling, and market-driven priorities shape how millions of non-academic researchers conceive of their relationship to the past.<sup>52</sup> When such platforms encourage individuals to connect across different family trees, they develop beneficial resources for the public while also raising questions about data ownership, research quality, and the relationship between technological access and genealogical participation.<sup>53</sup> Daniel Wagner’s analysis of genealogy’s evolution into a multifaceted academic

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<sup>49</sup> McCrady, Ellen, ed. (1982) Crisis in the National Archives. *Abbey Newsletter*, April. 6(2).  
<https://cool.culturalheritage.org/byorg/abbey/>: accessed 5 February 2025.

<sup>50</sup> Stiles, T.J. (2019) Opinion: America is losing its memory. *The Washington Post*, 7 May. <https://www.washingtonpost.com/>: accessed 20 October 2021.

<sup>51</sup> Finkel, Eli J. et al. (2020) Political sectarianism in America. *Science*, 30 October, 370(6516). p. 533.  
<https://doi.org/10.1126/science.abe1715>: accessed 6 August 2025.

<sup>52</sup> De Groot, Jerome. (2020) Ancestry.com and the evolving nature of historical information companies. *The Public Historian*, 42(1). pp. 11 and 13.

<sup>53</sup> Willever-Farr, Heather and Forte, Andrea. (2014) ‘Family matters: control and conflict in online family history production,’ *CSCW '14: Proceedings of the 17th ACM Conference on Computer Supported Cooperative Work & Social Computing*, 15–19 February, pp. 480–484.  
[https://www.academia.edu/70853389/Family\\_Matters\\_Control\\_and\\_Conflict\\_in\\_Online\\_Family\\_History\\_Production](https://www.academia.edu/70853389/Family_Matters_Control_and_Conflict_in_Online_Family_History_Production): accessed 21 January 2021).

pursuit further underscores the field's growing complexity, as new computational approaches enhance traditional qualitative methods while simultaneously challenging established standards of evidence and verification.<sup>54</sup>

### 1.8. The Scholarly Climate and Institutional Gatekeeping

Media coverage has amplified scholarly critiques of this genealogical subculture, often reducing complex institutional histories to singular controversies. The NSDAR's 1939 refusal to permit Marian Anderson to perform at Constitution Hall generated national media attention that shaped public perception of the organization for decades, establishing a narrative of racial exclusion that subsequent reporting reinforced, regardless of organizational changes in the intervening years.<sup>55</sup> Popular representations reinforced unflattering stereotypes: as Peggy Anderson noted in her 1974 work *The Daughters*, the public image frequently depicted members as wealthy women in outlandish hats and ill-fitting dresses, presumed to possess fortunes derived from their ancestors rather than their own accomplishments.<sup>56</sup> The United Daughters of the Confederacy (UDC) has faced particularly intense scrutiny during the Black Lives Matter movement because of the organization's documented historical role in constructing Lost Cause mythology and its long association in public memory with white supremacist ideology.<sup>57</sup>

This sustained critical attention, even when warranted, has produced institutional defensiveness that, paradoxically, limits the very scholarship that might provide a more nuanced understanding. When recruiting research participants for this study via social media, several responses illustrated how deeply members have internalized expectations of hostile academic treatment. One respondent asked, "Is this yet another woke academic attempt to portray those interested in genealogy and heritage as racist?" The phrase "yet another" suggests a perception

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<sup>54</sup> Wagner, Daniel. (2006) Genealogy as an academic discipline. *Avotaynu*. Spring, 12(1). p. 3. <https://avotaynuonline.com/>: accessed 14 August 2024.

<sup>55</sup> The Marian Anderson incident is extensively documented. See, among others, Allgor, Catherine. (2013) The DAR: where tradition meets tomorrow. *Prologue Magazine*, 45(3). The incident's persistence in public memory illustrates how a single controversy can define an organization's reputation across decades, regardless of subsequent institutional changes.

<sup>56</sup> Anderson, Peggy. (1974) *The Daughters: an unconventional look at America's fan club — the DAR*. New York: St. Martin's Press, p. 2.

<sup>57</sup> Cox, Karen L. (2017) White Supremacy is the whole point of Confederate Statues. *The Washington Post*. 20 August. p.B4. <https://www.proquest.com/historical-newspapers/> : accessed 9 February 2021. Cox identifies the UDC as the principal organization behind the late nineteenth- and early twentieth-century campaign of Confederate commemoration that the Black Lives Matter movement subsequently challenged. For contemporaneous reporting on the Richmond UDC headquarters fire during the 2020 protests, see Cox, Karen L. (2020) Setting the Lost Cause on Fire. *Perspectives on History*. 6 August. <https://www.historians.org/perspectives-article/setting-the-lost-cause-on-fire-protesters-target-the-united-daughters-of-the-confederacy-headquarters-september-2020/> : accessed 9 February 2021. Robinson, Lynda. (2020) Robert E. Lee statue and Daughters of Confederacy building attacked by Richmond Protesters. *The Washington Post*. 31 May. <https://www.washingtonpost.com> : accessed 9 February 2021. Schneider, Gregory S. and Vozzella, Laura. (2020) In the wreckage of Richmond, one small miracle – and anticipation of more protests. *The Washington Post*. 31 May. <https://www.washingtonpost.com> : accessed 9 February 2021. Treisman, Rachel. (2021) Nearly 100 Confederate Monuments Removed In 2020, Report Says; More Than 700 Remain. *NPR* 23 February. <https://www.npr.org/2021/02/23/970610428/nearly-100-confederate-monuments-removed-in-2020-report-says-more-than-700-remai> : accessed 24 February 2021.

of an established pattern rather than a reaction to this particular study.<sup>58</sup> Another assumed the research design predetermined its conclusions by replying to the request with “So to be succinct...you are searching for ways these groups are discriminating against others? That’s the gist of your thesis, right?”<sup>59</sup> A third characterized the survey as “mocking those of us who are members of ‘hereditary’ organizations,” declining to participate on that basis.<sup>60</sup> These responses occurred despite the researcher’s identification as both a professional genealogist and a member of multiple lineage societies, suggesting that insider status alone cannot overcome accumulated distrust of academic inquiry.

This defensive posture also extends to institutional gatekeeping of organizational archives. When seeking access to information for this research, the UDC agreed to limited cooperation, providing carefully curated documentation but granting no access to the archives themselves.<sup>61</sup> Such gatekeeping creates methodological challenges. Scholars without insider access must rely primarily on publicly available sources, which tend to emphasize controversies and conflicts over the organizational operations that constitute the majority of these institutions’ actual activities.

Insider positioning for this study introduces potential bias, which the methodology chapter addresses in detail.<sup>62</sup> However, it also enables access to evidence that complicates the predominantly critical framing of existing scholarship. What emerges from this expanded evidentiary base is a complex picture that neither uncritical celebration nor categorical condemnation would suggest. Documenting both the historical record of exclusionary practices and contemporary organizational efforts to address that legacy contributes to scholarly understanding without dismissing legitimate critiques or reducing these organizations to their most controversial moments.

The defensive responses encountered during research recruitment are analytically significant. They illustrate how hereditary organizations function as a subculture whose members perceive themselves as misunderstood and unfairly characterized by outsiders. This pattern of boundary-maintenance behavior, seen through the closing of ranks, the suspicion of external inquiry, and the assumption of hostile intent, represents a distinguishing characteristic that sets hereditary

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<sup>58</sup> Response to survey recruitment post, Virginia Genealogy Facebook group, October 2021. Commenter names withheld to protect privacy of individuals who did not consent to participate in the research.

<sup>59</sup> Response to survey recruitment post, Boston University Genealogical Research Certificate Program Facebook group, October 2021.

<sup>60</sup> Response to survey recruitment post, Descendants of the Mayflower Facebook group, October 2021.

<sup>61</sup> The UDC would only allow the archivist to send scanned copies of the organization’s registrar’s reports and denied access to any membership data or an on-site visit. A UDC spokesperson told *The Washington Post* that she had declined to make other members available for comment, explaining that she did not believe they would be comfortable with or perform well in media interviews. See Salmon, Jacqueline L. (2000) *Daughters of the Confederacy Adapting to New Times*. *The Washington Post*. 25 June. <https://www.proquest.com/historical-newspapers>: accessed 20 October 2022.

<sup>62</sup> See Chapter 4 for a detailed discussion of researcher positionality, including the specific frameworks employed to manage insider bias while leveraging insider access.

organizations apart from other genealogical communities. Looking across experiences in multiple genealogical contexts (at professional genealogists, regional genealogical societies, and ethnic genealogical organizations) there is not a comparable wariness toward academic study.<sup>63</sup> This difference suggests that hereditary organizations occupy a distinctive position within the broader genealogical landscape, one shaped by their controversial histories, their exclusionary membership structures, and their accumulated experience of critical scrutiny. Understanding this defensiveness is essential for interpreting the research findings that follow, because it shapes both the evidence available to scholars and how members frame their organizational experiences when they choose to participate in academic research.

## **1.9. Thesis Outline**

As previously stated, this thesis examines the interrelated development of genealogy and lineage organizations through historical investigation and empirical data analysis. The research employs a mixed-methods design that integrates historical and genealogical approaches, combining archival research, organizational case studies, survey data, and interviews to examine how hereditary organizations evolved during a period of transformation in American genealogical practice. The structure of the thesis reflects the logic of this investigation, moving from historical foundations through methodological considerations to analysis and comparative case studies before concluding the paradox of democratic exclusion that frames the inquiry.

Chapters 2 and 3 provide the historiographical foundations for understanding this genealogical subculture. Chapter 2 traces the origins and development of American genealogical practice and the formation of hereditary organizations from the 1790s through the late 1960s, examining how American genealogical trends diverged from European traditions. Chapter 3 examines watershed moments and transformative developments during the fifty-year study period, drawing primarily on newspaper articles that capture the perspectives of journalists, participants, and the broader public.

Chapter 4 discusses the methodological framework employed for primary research. It details the mixed-methods approach combining historical analysis with original data collection. Explaining the rationale for design choices, data gathering, and analytical procedures.

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<sup>63</sup> This observation reflects the researcher's professional experience conducting genealogical research across multiple organizational contexts over more than a decade, including professional genealogical associations, regional genealogical societies, and ethnic genealogical organizations. While systematic comparative data on organizational receptivity to academic inquiry does not exist, the contrast between hereditary organizations' wariness and other genealogical communities' general openness was consistent across the research period.

*Chapter 1 The Conjunction of Genealogy and Lineage Organizations*

Chapters 5, 6, and 7 present empirical findings from the survey and interviews. Chapter 5 examines patterns in community composition, generational influences, and evolving participation trends. Next, chapter 6 analyzes professional identity formation in genealogy, tracing how practitioners distinguish between hobbyists, serious amateurs, and credentialed professionals. Finally, chapter 7 addresses questions of access and exclusion by examining how individual motivations and structural barriers intersect with organizational practices.

Case studies in Chapters 8 and 9 examine the NSDAR and GSMD, respectively, moving from aggregate patterns to sustained examination of how specific organizations have evolved. They discuss both common patterns and significant variations in how hereditary societies have navigated changing circumstances.

Finally, Chapter 10 draws together the historiographical research, survey findings, and case study analyses to present a comprehensive assessment. The conclusion directly addresses whether the paradox of democratic exclusion identified at the thesis's outset persisted unchanged through this period, evolved into new forms, or found resolution through organizational transformation and changing social contexts.



## **Chapter 2 The Formation of American Lineage Culture Before 1970**

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The evolution of American genealogy represents a complex interplay of egalitarian ideals and ancestral pride, professional standards and amateur enthusiasm, and exclusionary practices alongside democratizing forces. From its earliest post-revolutionary origins to the threshold of transformative change in the 1970s, genealogical practice in America reflected broader social tensions while establishing frameworks that would shape future development.

Hereditary and lineage organizations represent one distinctive approach to ancestral research among several that developed during the 19<sup>th</sup> century. While this chapter focuses primarily on these bloodline-based organizations, they operated alongside other genealogical traditions, including ethnic heritage societies, Mormon religious genealogy doctrine, and the emerging community of professional genealogists, each with different motivations, methods, and membership. Understanding hereditary organizations as one bounded subculture within a diverse genealogical landscape provides essential context for analyzing their characteristics, practices, and evolution into the 21<sup>st</sup> century.

Significant historical events, particularly the American Civil War and the World Wars, catalyzed substantial developments in American genealogical practice. Genealogical practice reflected and reinforced social hierarchies through the 19<sup>th</sup> and 20<sup>th</sup> centuries. Lineage society membership often functioned as a form of social capital, with genealogical documentation practices favoring those with wealth, education, and leisure time. A timeline illustrating the formation of some major lineage societies in the United States is provided in Appendix 2.

By the late 1960s, American genealogy stood at a crossroads. The establishment of professional credentials, growing methodological awareness, increasing public interest in heritage, and early adoption of technological tools laid the foundation for the watershed transformations that would reshape genealogical practice in the decades to follow. But how did the field get there? This chapter examines the complex historical foundations that set the stage for these transformative developments.

### **2.1. The Society of the Cincinnati and the Democratic Paradox**

Following the American Revolution, genealogical trends in the United States began to diverge from those in Europe. Americans theoretically left behind heraldry, aristocratic airs, and unbreakable social classes. They looked to the future, envisioning a society in which everyone

enjoyed equality from birth and possessed unalienable rights. This meant that everyday Americans shunned and ridiculed anything resembling elitism, often publicly, to demonstrate society's new attitude.

George Washington exemplified this contradiction of moving on while falling into familiar tropes. The first president of the United States agreed to serve as the Society of the Cincinnati's first President General, which is recognized today as the first hereditary society in the United States.<sup>64</sup> It is generally accepted by historians that a group of men led by Henry Knox began drafting ideas for the organization's formation in 1783. They chose the name Society of the Cincinnati (SoC) to honor the Roman leader Lucius Quinctius Cincinnatus.<sup>65</sup> Cincinnatus was a renowned military leader who retired to be a citizen-farmer rather than seizing power in Rome, as many wished he would. This parallel resonated with Washington's own decision to resign his military commission and return to Mount Vernon at the conclusion of the Revolution, rather than exploit his commanding position.

The order limited membership to commissioned officers who had served for three years or were currently serving at the formation of the organization, and to their eldest sons upon their father's death. They were also officers in the Continental Line of the American Army, or actively serving when Congress released the military after the war.<sup>66</sup> Foreign officers were also admitted to the ranks as honorary members, but their children were not eligible to assume their father's position upon death.<sup>67</sup> Additionally, the members were required to donate one month's pay to the organization, which enabled them to establish a trust for future endeavors.

Washington was concerned that showing interest in one's ancestry and creating an organization so like an aristocratic order, complete with medals and emblems, could lead people to perceive them as elitist.<sup>68</sup> His views encapsulated the tension between democratic ideals and genealogical inquiry that would shape the field's development throughout the 19th century. The publication *Considerations on the Society or Order of Cincinnati* by South Carolina Judge Aedanus Burke, under the pseudonym Cassius, further confirmed this.

In his pamphlet, Burke implies that this organization sought to recreate the same social class system that Americans fought to break free from. He wrote that the society would elevate these

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<sup>64</sup> Weil, François. (2007) John Farmer and the Making of American Genealogy. *The New England Quarterly*. 80(3). p. 411. <https://www.jstor.org/stable/20474555>: accessed 14 December 2020; Davies, Wallace Evan. (1955) *Patriotism on Parade: The Story of Veterans' and Hereditary Organizations in America, 1783-1900*. p. 2. Cambridge, Massachusetts: Harvard Historical Studies.

<sup>65</sup> Myers, Minor, Jr. (1983) *Liberty Without Anarchy: A History of The Society of The Cincinnati*. Charlottesville: University of Virginia Press. p. 26

<sup>66</sup> Myers, *op. cit.* p. 26. See also: Weil (2013) *op. cit.* pp. 120-121.

<sup>67</sup> Myers, *op. cit.* p. 26

<sup>68</sup> Weil (2013) *op. cit.* pp. 120-121.

men, already honored and idolized, to a ruling class.<sup>69</sup> This class would then become the new American aristocracy. This treatise, published in Philadelphia by Robert Bell in October 1783, five months after the organization's founding, caused anger and dissent in the new country. While his fears did not come to fruition, they did strike a blow, a blow the SoC did not fully recover from for several decades.<sup>70</sup>

## 2.2. Gatekeepers of Heritage: Who Controlled Ancestral Knowledge

As a young nation comprised primarily of those taking their chances at eking out an existence during westward expansion, genealogy was not a widespread concern for the public. The further away a generation was from its immigrant ancestors, the less it knew about its non-American origins and heritage.<sup>71</sup> To compound the situation, early American genealogy was often the purview of antiquarian scholars, typically upper-class, who had the luxury of pursuing research at their leisure.

Historically, people deemed genealogical researchers as gatekeepers to heritage and, in some cases, to a person's prestige.<sup>72</sup> American genealogists of the 19th century were reluctant to use many documents considered essential for this work today. They typically did not consult official vital or government-issued records. Instead, they relied on family papers, oral histories, and other non-official records. This was primarily due to easier access to people than to records stored in courthouses.<sup>73</sup> These non-official records often showed multigenerational descent from specific ancestors, whereas official birth, death, or marriage records provided information for only one generation, not an entire lineage. Unfortunately, family lore is often incorrect for a myriad of reasons.

Historical studies suggest that the keepers and researchers of a family's history were often women within the family, who were not necessarily antiquarians. These women were usually childless spinsters, ensuring that the family lore was passed down to future generations.<sup>74</sup> Women were also subject to other societal constraints that limited their ability to contribute to the construction of a new national identity, a phenomenon evident in both the United States and

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<sup>69</sup> Burke, Aedanus. (1783) *Considerations on the Society or Order of Cincinnati*. University of Michigan Library Digital Collections. <http://name.umdl.umich.edu/N14115.0001.001>: accessed 24 March 2023. See also: Davies *op. cit.* p. 6. And: Weil (2007) p. 410

<sup>70</sup> Davies *op. cit.* p. 6 and 11.

<sup>71</sup> Morgan, Francesca. (2010) A Noble Pursuit? Bourgeois America's Uses of Lineage. In: S. Beckert and J. B. Rosenbaum (eds.), *The American Bourgeoisie: Distinction and Identity in the Nineteenth Century*. pp. 135-151. New York: Palgrave Macmillan.

<sup>72</sup> Lambert, Ronald D. (2006) Descriptive, Narrative, And Experiential Pathways to Symbolic Ancestors. *Mortality*. 11(4). p. 329. doi.org/10.1080/13576270600945584: accessed 13 September 2021.

<sup>73</sup> Weil (2013) *op. cit.* pp. 146-147.

<sup>74</sup> Morgan (2010) *op. cit.* p. 255.

Canada during the late 19th century.<sup>75</sup> Women attempted to reclaim the narrative by forming their own lineage groups, thereby being seen as promoting traditional roles, performing civic duties, and participating in politics.<sup>76</sup> The formation of these hereditary organizations sets them apart from both academic historical practice and the broader landscape of women's voluntary associations.

With the growing middle class in the late 19th century, women were able to leave the home and participate in leisure activities like never before. This marked the beginning of the women's club movement, which supported a wide range of causes, from temperance to suffrage.<sup>77</sup> These groups formed the General Federation of Women's Clubs (GFWC), which continues to operate today, to promote their causes and provide an outlet for women volunteers in the United States.<sup>78</sup>

However, the early press often contradicted the stereotype of genealogists as elderly spinsters. In a 1899 article, journalist I. Trent stated that young women were becoming professional genealogists in cities like New York and Boston.<sup>79</sup> According to the article, a woman genealogist should be "A person of great patience, willing to spend days and days deciphering difficult and illegible documents, with the possibility that at the end of her search, she may have very little to show for it."<sup>80</sup> Press continued to describe the up-and-coming genealogist as a younger person with a degree in history, language proficiency, and an alert, attractive appearance.<sup>81</sup> With the skills of a historian and linguist, professional genealogy was becoming the perfect profession for young, college-educated women.

At the same time, the American Historical Association (AHA), founded in 1884, actively encouraged professional historians to distance themselves from amateurs pursuing genealogy.<sup>82</sup> American historians deliberately redefined their methodologies to establish professional status, effectively severing ties with genealogists. By the 1940s, people widely viewed genealogy as a niche subject, characterizing it as a trivial pursuit for those with too much time on their hands. This sentiment reflected broader tensions in the production and validation of historical

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<sup>75</sup> Snell, Rachel A. (2018) 'God, Home, and Country': Women, Historical Memory, and National Identity in English Canada and the United States. *American Review of Canadian Studies*. 48(2). p.245. <https://doi.org/10.1080/02722011.2018.1472946>: accessed 16 October 2020.

<sup>76</sup> *Ibid.*

<sup>77</sup> Davies, *op.cit.* p. 56.

<sup>78</sup> General Federation of Women's Clubs (2025) *Our Story*. General Federation of Women's Clubs <https://www.gfwc.org/>: accessed 15 July 2025.

<sup>79</sup> Trent, I. (1899) By The Way. *Clarion-Ledger*. 26 November. p.3. <https://www.newspapers.com/>: accessed 12 March 2021.

<sup>80</sup> —, *Evansville Journal*. (1901) Digging Up One's Ancestors: Eastern Women Find a New Occupation — Hired By The Day To Hunt Proof Of Kinship. *Evansville Journal*. 25 August. <https://www.genealogybank.com>: accessed 22 May 2021.

<sup>81</sup> —, *El Paso Herald*. (1912) Building Pedigrees For Those Who Can Pay Is The Newest Profession. *El Paso Herald*. 8 March. <https://www.newspapers.com>: accessed 13 March 2021.

<sup>82</sup> O'Hare, Sheila. (2002) Genealogy and History. *Common Place: The Journal of Early American Life*. April. 2(3). <http://commonplace.online/article/genealogy-and-history>: accessed 25 March 2021.

knowledge among academics, who continued to influence disciplinary boundaries, moving them away from genealogy.<sup>83</sup>

Despite the encouragement of young college graduates and the development of sophisticated research methodologies in genealogy, many academic historians continued to regard it as a pursuit of individuals who indulge themselves in an inconsequential quest for their family and who occupy space in an archive that could be used by those undertaking serious study.<sup>84</sup> This perception has lingered and has current practical implications for genealogical researchers. It often limits access to specialized collections and institutional resources for those who view genealogy as a less serious research activity.<sup>85</sup> However, this viewpoint overlooks the potential for serious leisure activities to make meaningful contributions to scholarly discourse.

Stereotypical perceptions of genealogists have evolved significantly over time. Russell E. Martin points to the long-standing stereotype (prevalent from the early 1900s through the 1990s) that those in other archival-driven fields frequently described genealogists as retired, often elderly, white women who surrounded themselves with books they might not need while asking “burdensome questions” of the staff.<sup>86</sup> These gendered and ageist caricatures reflect, once again, the marginalization of genealogical practice within academic contexts and illustrate how gender dimensions influenced institutional responses to genealogical researchers for decades.

### 2.3. Regional Traditions in Ancestral Preservation

The 19th century also witnessed the establishment of genealogical institutions. The regional concentration of institutions in the Northeastern United States created a significant divide in approaches to genealogical documentation. Northern states developed robust paper-based institutional practices, thanks to the wealth of primary documentation available. In contrast, the southern states maintained oral traditions, resulting in disparate development patterns that persisted for generations.<sup>87</sup>

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<sup>83</sup> O’Hare *op. cit.* Mills, Elizabeth Shown. (1983) Academia vs Genealogy: Prospects for Reconciliation and Progress. *National Genealogical Society Quarterly*. 71(2). p. 99; Hoeve, Casey Daniel. (2018) Finding a Place for Genealogy and Family History in the Digital Humanities. *Digital Library Perspectives*. 34(3). p. 219. <https://www.emeraldinsight.com/2059-5816.htm>: accessed 20 May 2021.

<sup>84</sup> Martin, Russell E. (2016) Historical Genealogy: The Evolving Definition and Uses of an Ancillary Historical Discipline. *Russian Studies History*. 55(1). p. 1. <https://doi.org/10.1080/10611983.2016.1214017>: accessed 14 August 2021.

<sup>85</sup> Redman, Gail R. (1993) Archives and Genealogists: The Trend Toward Peaceful Coexistence. *Archival Issues*. 18(2). pp. 121, 124–125. <https://www.jstor.org/stable/41101858>: accessed 5 February 2021.

<sup>86</sup> Martin, *op. cit.* p. 1. See also: Redman, *op. cit.* pp. 121-132.

<sup>87</sup> Weil (2013) *op. cit.* pp. 120-121; Mell, Annie White (1897) “Obstacles to D.A.R. Work in the South.” *American Monthly Magazine*. 11(2). pp. 363-369; Morgan (2010) *op. cit.* p. 139.

The New England Historical and Genealogical Society (NEHGS), organized in Boston, Massachusetts, emerged as a pioneering institution in documentary genealogy. However, its early leadership, notably President William Whiting, expressed skepticism about genealogy's broader appeal and future popularity in an 1853 speech to the membership, declaring that "the study of genealogy will never become a popular pursuit" and that such views had "no little plausibility when presented to unreflecting minds."<sup>88</sup> This institutional skepticism reflected deeper societal tensions regarding the current and future role of ancestral research in a democratic society. Little did he know that by the end of the 19th century, the upper classes, regardless of ethnic background, began to turn to genealogy to distinguish themselves from "others" to preserve their distinction as descendants of national importance amid growing social mobility.<sup>89</sup>

Records-based vs. oral-based genealogy does result in differences in the quality and quantity of information obtained by researchers. While official records can contain mistakes in the information reported, such as errors often found in transcriptions from handwritten documents or errors in reporting by uninformed relatives, they are typically unchanged once recorded. However, like the children's game of telephone, oral histories can morph over time through retelling or the addition and deletion of information, ultimately changing a family history. This dichotomy of record access affected people's ability to document their family and join heritage and lineage organizations as they were established.

Alongside regional variations in genealogical practice, Mormons developed a distinctive approach to ancestral research driven by religious rather than social imperatives. The Genealogical Society of Utah, founded in 1894, the same year the church established its genealogical library in Salt Lake City, institutionalized genealogical research as a religious obligation tied to the doctrine of posthumous baptism and "sealing" of families for eternity.<sup>90</sup> Mormon genealogical practice sought to identify all ancestors regardless of their social status or historical significance. This fundamental difference in purpose, religious salvation versus social exclusivity, produced markedly different methodological approaches and institutional structures.

However, the Mormon emphasis on comprehensive record collection would eventually transform American genealogical practice through initiatives like the Genealogical Society's microfilming program. Beginning in 1938, it systematically preserved records from repositories

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<sup>88</sup> Whiting, W. (1853) *An Address Delivered to the Members of the Historic-Genealogical Society, on Wednesday, January 12, 1853*. Boston: Dutton and Wentworth, printers. Cited in Hershkovitz (2016) *op. cit.* p.18.

<sup>89</sup> Morgan (2010) *op. cit.* pp. 141-142.

<sup>90</sup> Akenson, Donald H. (2007) *Some Family: The Mormons and How Humanity Keeps Track of Itself*. Montreal: McGill-Queen's University Press; Allen, James B., Embry, Jessie L. and Mehr, Kahlile B. (1995) *Hearts Turned to the Fathers: A History of the Genealogical Society of Utah, 1894-1994*. Provo, Utah: BYU Studies.

worldwide. By 1970, the church had already amassed an unparalleled genealogical archive that served researchers of all backgrounds. Utah had become “the center of genealogical inquiry,” hosting a variety of enterprises built around the Mormon Church’s efforts to preserve ancestral records, establishing what researchers characterized as “the Mecca for genealogists.”<sup>91</sup> The Mormon approach demonstrated that genealogical infrastructure could serve purposes entirely distinct from the social stratification functions of hereditary organizations, providing a comparative framework for understanding the specific choices hereditary organizations made about documentation standards and membership criteria.

The economic dimensions of lineage society membership have historically involved direct costs (membership fees, dues, and often specific attire) and indirect expenses related to proving eligibility (research costs, professional genealogist fees, and travel). If a prospective member were financially well-off, they could afford to travel, conduct research, or even hire a genealogist to do it for them. Persons of higher status, who also had ancestors of similar or higher status, found genealogical research easier than those from lower classes, because wealthy, historically significant ancestors were more frequently recorded in historical documents, unlike their impoverished or transient counterparts.<sup>92</sup> Those who possessed generational wealth were more likely to find documentation and pay to have it located.

The concept of documentary privilege stands as a central consideration in modern genealogical practice. In his *Medium* opinion piece, Andrew Gaertner argued that, historically, preserving records has favored socially privileged groups, creating enduring disparities in genealogical documentation.<sup>93</sup> This stance by prominent organizations often manifested in what critics termed “the sport of Brahmins,” according to Russell E. Bidlack, reflecting broader social hierarchies and exclusionary practices.<sup>94</sup> Contemporary researchers recognize that extensive family documentation represents a form of inherited privilege that continues to influence modern research.

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<sup>91</sup> The Family History Library in Salt Lake City had amassed over one million rolls of microfilm containing vital statistics of more than a billion people from sixty countries by 1980. Hays, Samuel P. (1986) *History and Genealogy: Patterns of Change and Prospects For Cooperation*. In: R.M. Taylor Jr. and R.J. Crandall (eds.), *Generations and Change*. p. 38. Macon, GA: Mercer University Press; Richard E. Turley Jr as quoted by Hu, Winnie. (2001) *Mormons Release Database For Blacks Searching Roots*. *The New York Times*. 27 February. <https://www.nytimes.com>: accessed 29 April 2023; Raine, George. (1980) *Bank Stores Genealogies By The Billion*. *The New York Times*. 21 December. <https://www.nytimes.com>: accessed 12 May 2021.

<sup>92</sup> Morgan (2010) *op. cit.* p. 136.

<sup>93</sup> Gaertner, Andrew. (2021) *Is My Genealogy Hobby Racist? What I Learned as a Potential Son of the American Revolution*. *Medium.com*. 25 December. <https://medium.com/age-of-awareness/is-my-genealogy-hobby-racist-9bdf6df6d60c>: accessed 10 February 2022; Gardner, Eric. (2003) *Black and White: American Genealogy, Race, and Popular Response*. *The Midwest Quarterly*. 44(2). p. 149. <https://www.proquest.com/scholarly-journals>: accessed 15 November 2021.

<sup>94</sup> Bidlack, Russell E. (1983) *The Awakening: Genealogy as it Relates to Library Service*. *Reference Quarterly*. 23(2). pp. 171-172. <https://www.jstor.org/stable/25827122>: accessed 9 June 2021.

#### 2.4. Legal Frameworks for Social Segregation

The relationship between US immigration policy and genealogy-based organizations represents a critical but underexamined dimension of American institutional exclusion. From the Naturalization Act of 1790 through the Immigration Act of 1924, federal immigration laws established legal frameworks to protect the United States and its interests. Lineage societies and other organizations systematically adapted these laws to create and justify their own membership practices, often seen as exclusionary.

The exclusionary foundation of American immigration law began with the Naturalization Act of 1790, which restricted citizenship to “free white persons” who had resided in the United States for two years and demonstrated “good moral character.”<sup>95</sup> This foundational legislation effectively excluded Native Americans, enslaved persons, free African Americans, and indentured servants. Beginning with the Chinese Exclusion Act of 1882, the first federal law to explicitly suspend immigration based on nationality, the law’s racial restrictions were extended further to bar Asian immigrants from naturalization.<sup>96</sup> The Immigration Act of 1917, also known as the Asiatic Barred Zone Act, established the first geographically defined racial exclusion zone, prohibiting immigration from regions including much of Asia, and implemented literacy tests while expanding categories of “undesirable” immigrants.<sup>97</sup>

The Immigration Act of 1924 (Johnson-Reed Act) represented the most comprehensive exclusionary legislation in American history. According to the U.S. Department of State, the law’s explicit purpose was “to preserve the ideal of U.S. homogeneity.”<sup>98</sup> The National Origins Formula calculated quotas mathematically, favoring Northern and Western European immigrants while severely limiting Southern and Eastern Europeans, creating what historian Mae Ngai identified as a system that “constructed a White American race, in which persons of European descent shared a common Whiteness distinct from those deemed to be not White.”<sup>99</sup>

Critical Supreme Court decisions reinforced these exclusionary frameworks. *Ozawa v. United States* (1922) ruled that Takao Ozawa, a Japanese immigrant who had lived in the U.S. for 20

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<sup>95</sup> Congress.gov. (2025) ArtI.S8.C4.1.2.3 Early U.S. Naturalization Laws. Constitution Annotated.

[https://constitution.congress.gov/browse/essay/artI-S8-C4-1-2-3/ALDE\\_00013163/](https://constitution.congress.gov/browse/essay/artI-S8-C4-1-2-3/ALDE_00013163/): accessed 28 July 2025.

<sup>96</sup> National Archives and Records Administration. (2023) *Milestone Documents: Chinese Exclusion Act (1882)*. National Archives. <https://www.archives.gov/milestone-documents/chinese-exclusion-act>: accessed 18 July 2025. The Chinese Exclusion Act established crucial precedents for ancestry-based exclusion that lineage organizations would later mirror.

<sup>97</sup> Immigration Act of 1917 (Asiatic Barred Zone Act). (Pub. L. 301; 39 Stat. 874). United States of America. The act created the first geographically defined exclusion zone, barring immigration from a region extending from the Middle East to Southeast Asia, and imposed the first broadly applied literacy test for incoming immigrants. The expanded excludable categories reflected the influence of the eugenics movement and nativist anxieties about the perceived degradation of American society through immigration.

<sup>98</sup> Office of the Historian. (2025) *The Immigration Act of 1924 (The Johnson-Reed Act)*. The United States Department of State. <https://history.state.gov/milestones/1921-1936/immigration-act>: accessed 17 July 2025.

<sup>99</sup> Ngai, Mae M. (2004). *Impossible Subjects: Illegal Aliens and the Making of Modern America*. Woodstock, Oxfordshire: Princeton University Press. pp. 24-25.

years, was ineligible for citizenship because Japanese were not “white persons” under naturalization laws.<sup>100</sup> *United States v. Bhagat Singh Thind* (1923) created further precedent by ruling that, despite being anthropologically Caucasian, an Indian Sikh veteran was ineligible for citizenship.<sup>101</sup>

Collectively, these legislative and judicial actions established the legal architecture of exclusion in American public life. The nationalist pride that accompanied the centennial of the United States in 1876 had already fueled the proliferation of patriotic-hereditary organizations, which drew upon genealogical descent to define authentic American identity.<sup>102</sup> Decades later, the anti-communist fervor of the 1920s, combined with the Supreme Court’s codification of racial categories in *Ozawa* and *Thind*, reinforced and expanded the exclusionary practices that had taken root in these organizations and in American society more broadly.<sup>103</sup>

The legal frameworks established by immigration law and Supreme Court decisions created conceptual models that hereditary organizations adapted to their own membership practices. While lineage societies did not directly enforce federal law, they developed parallel systems of documentation and classification that mirrored governmental approaches to determining belonging.<sup>104</sup> The bureaucratic requirements for proving citizenship status found echoes in the documentary evidence requirements for proving ancestral descent. Both systems privileged those with access to institutional record-keeping and penalized those whose ancestors had been excluded from or marginalized within such systems.

Those organizations that required proof of descent from ancestors and often operated through invitation-only membership created exclusive social hierarchies. They used “lineal descendant” terminology and established documentation requirements that paralleled the bureaucratic barriers of immigration law.<sup>105</sup> Most organizations founded at the end of the 19th and the start

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<sup>100</sup> Teel, Steven C. (1998) Lessons on Judicial Interpretation: How Immigrants Takao Ozawa and Yick Wo Searched the Courts for a Place in America. *OAH Magazine of History*. Fall. 13(1). p.47. <http://www.jstor.org/stable/25163253>; accessed 14 July 2025. The Court declared: “The words ‘white person’ were meant to indicate only a person of what is popularly known as the Caucasian race.”

<sup>101</sup> U.S. Supreme Court. (1923) *United States v. Bhagat Singh Thind*, 261 U.S. 204. *JUSTIA*. <https://supreme.justia.com/cases/federal/us/261/204/>; accessed 28 July 2025. The Court reasoned: “‘Free white persons,’ as used in that section, are words of common speech, to be interpreted in accordance with the understanding of the common man, synonymous with the word ‘Caucasian’ only as that word is popularly understood.” See also: U.S. Supreme Court. (1922) *Ozawa v. United States*, 260 U.S. 178. *JUSTIA*. <https://supreme.justia.com/cases/federal/us/260/178/>; accessed 28 July 2025.

<sup>102</sup> Teachout *op. cit.* pp. 134-135. Teachout documents how the SAR and DAR shifted the meaning of Americanism away from democracy and toward the Revolution as a historical event, a shift that began during the centennial period.

<sup>103</sup> Erickson, Christine K. (2004) ‘So Much For Men’: Conservative Women and National Defense in the 1920s and 1930s. *American Studies*. 45(1). pp. 85-102. <https://www.jstor.org/stable/40643619>; accessed 17 October 2020. Erickson discusses how organizations like the DAR adopted strong nationalist and anti-radical positions during this period, reinforcing exclusionary membership practices as expressions of patriotic vigilance.

<sup>104</sup> Teachout *op. cit.* p. 113. All patriotic-hereditary societies required proof of patriotic ancestry, effectively linking patriotism with family history and specific past events. Their documentation requirements functioned as parallel bureaucratic systems of belonging.

<sup>105</sup> Strange *op. cit.* pp. 106-107. Strange notes that even as DAR members filled out eligibility forms presenting lineage documentation, Bureau of Indian Affairs agents were drawing up blood quantum rolls and Jim Crow courts were ruling on racial status, illustrating the parallel documentary systems operating across American institutions.

of the 20th century required descent from participants in specific historical events, such as the American Revolution, colonial settlement, or the Mayflower voyage. In practice, this meant that qualifying ancestors were predominantly of British or Northern European origin, though eligibility was based on participation in the event rather than ethnicity.<sup>106</sup>

## 2.5. The Rise of Patriotic-Hereditary Societies

The end of the 19th century was a tumultuous period in American history, following the upheavals of the American Civil War (1861-1865). However, it also presented opportunities to heal the nation by recognizing common ancestral links through genealogical research and membership in organizations based on common heritage. Genealogy was also affected by the social changes, urbanization, and internal migration patterns that emerged in the 1870s, but these changes led people to stabilize new family situations through ties to family history.<sup>107</sup>

The emergence of patriotic-hereditary organizations in the United States began in the mid-1870s, as depicted in Figure 1. The Sons of Revolutionary Sires (SRS), founded in San Francisco in 1875, was the first hereditary organization in the United States based on Revolutionary ancestry, outside the SoC.<sup>108</sup> This California organization preceded the Sons of the Revolution (SR), established in New York City in 1883 as the first hereditary organization in the East, which, in turn, emerged years before the formation of the SAR (1889) and the DAR (1890) in Washington, D.C.<sup>109</sup> The regional distribution of these early organizations, beginning on the West Coast before developing in the East, challenges contemporary assumptions that hereditary organizations emerged primarily from established Eastern elite circles.

However, because organizations such as the SAR and DAR established themselves in Washington, D.C., they, along with other organizations formed there before 1901, automatically received congressional charters.<sup>110</sup> Unfortunately, the granting of a charter misled the public, members, and other organizations into believing that the Federal government supported and condoned the actions and formation of these organizations. A procedural change enacted by Congress in 1901 no longer granted organizations incorporated within the District an automatic

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<sup>106</sup> Teachout. *op. cit.* pp. 112, 134–135. Davis *op. cit.* pp. 46-47, 64-69. Davis documents the event-based eligibility requirements of the major hereditary organizations and their concentration among descendants of British and Northern European colonial populations.

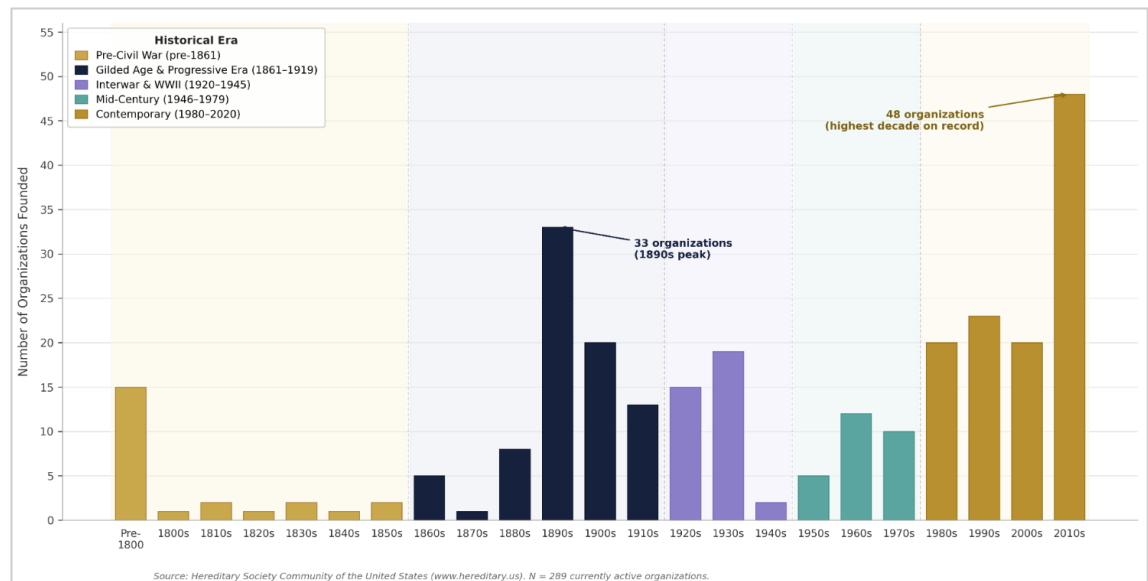
<sup>107</sup> Weil (2013) *op. cit.* pp. 112, 128.

<sup>108</sup> Teachout *op. cit.* p. 15.

<sup>109</sup> Sons of the Revolution in the State of New York. (2025) History. *SRNY*. <https://www.sonsoftherevolution.org/history>; accessed 16 December 2025; National Society Daughters of the American Revolution. (n.d.) Founding of the DAR. *NSDAR Archives*. <https://www.dar.org/national-society/about-dar/dar-history/founding-dar>; accessed 10 August 2024.

<sup>110</sup> Hogue, Henry B. (2022) *Title 36 Charters: The History and Evolution of Congressional Practices*. Congressional Research Service. <https://www.congress.gov/crs-product/R47236>; accessed 6 May 2023.

congressional charter. Title 29 of the District of Columbia Code permitted simple incorporation, like other states, without requiring congressional approval.<sup>111</sup>



**Figure 1:** Founding waves of active American hereditary and lineage organizations by decade, pre-1800 to 2010s. Color coding indicates historical era: gold (Pre-Civil War, pre-1861), navy (Gilded Age and Progressive Era, 1861–1919), purple (Interwar and World War II, 1920–1945), teal (Mid-Century, 1946–1979), and dark gold (Contemporary, 1980–2020). The 1890s peak of thirty-three organizations reflects the concentrated formation of major national societies including the Daughters of the American Revolution (1890), the Sons of the American Revolution (1889), the United Daughters of the Confederacy (1894), the Sons of Confederate Veterans (1896), and the General Society of Mayflower Descendants (1897), all products of the same Gilded Age anxieties about immigration, industrialization, and contested national identity examined in this chapter. The 2010s total of forty-eight organizations — the highest decade on record — reflects the contemporary expansion and diversification of the subculture discussed in Chapters 8 and 9. *N* = 289 currently active organizations. Source: Hereditary Society Community of the United States.

As Woden Teachout documented, these organizations shared fundamental characteristics despite their geographic dispersion. They all required proof of patriotic ancestry, effectively linking patriotism to family history and past events.<sup>112</sup> The founding of American hereditary societies represented what Teachout characterized as “a truly modern, and radical, move.”<sup>113</sup> For many Americans who were not members, these societies formed the antithesis of the nation’s democratic tradition. They were attacked as aristocratic, un-American, and disloyal. Yet the members themselves believed they epitomized American values. This fundamental tension between democratic ideals and bloodline-based membership would define hereditary organizations throughout their subsequent history.

<sup>111</sup> Council of the District of Columbia (2022) *Code of the District of Columbia. Chapter 4. Nonprofit Corporations.* Council of the District of Columbia. <https://code.dccouncil.gov/us/dc/council/code/titles/29/chapters/4>; accessed 6 May 2023.

<sup>112</sup> Teachout *op. cit.* p. 113.

<sup>113</sup> Teachout *op. cit.* p. 112.

The process of national healing after the Civil War operated through deliberate efforts to emphasize shared heritage rather than recent conflicts. As sectional politics had torn the Union apart, white Americans on both sides of the conflict sought common ground through their pre-war ancestry.<sup>114</sup> This reconciliation through genealogy was not incidental but rather a conscious strategy pursued by both Northern and Southern families and the emerging lineage organizations that served them.<sup>115</sup> As Teachout shows, these organizations deliberately shifted attention away from ongoing democratic debates by focusing on “the events of the Revolution rather than the ongoing project of American democracy.”<sup>116</sup>

As previously stated in the introduction, estimates in the 1890s indicated that “about one-half the women of America, today, are eligible to membership” in the DAR, and others suggested that millions of living descendants of Revolutionary patriots existed.<sup>117</sup> Figures that, while likely inflated, suggest the hereditary requirement was not an insurmountable barrier for established white families with access to documentation. While the SAR's co-founder, William McDowell, had conflicting loyalties regarding the war. His father was a Union veteran, while his father-in-law was a Confederate veteran. Recognizing the emotional underpinnings of both sides of the conflict, McDowell took pains to ensure equal representation of southerners and northerners among the SAR's founding officers.<sup>118</sup>

Often, this reconciliation was at the expense of minorities within the United States, specifically, formerly enslaved persons or freed blacks now living independently in the broader community. Like other Americans, those of African descent also needed to connect with their past. Unfortunately, this also caused division within their communities. While formerly enslaved people searched during Reconstruction for family members forcibly separated from each other, those who were free before the Civil War also engaged in genealogical research, often to demonstrate they were above those who were enslaved, perpetuating the same cycle of elitism as in the non-African community.<sup>119</sup>

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<sup>114</sup> Weil (2013) *op. cit.* p. 128; Strange *op. cit.* p. 106.

<sup>115</sup> The deliberate nature of this reconciliation strategy is evident in both organizational rhetoric and leadership decisions. See Davis (1955) pp. 277-278 on McDowell's deliberate balancing of Northern and Southern representation; Teachout pp. 134-135 on the shift from democratic debates to Revolutionary commemoration; Weil (2013) p. 128 on genealogy as a mechanism for sectional reconciliation.

<sup>116</sup> Teachout *op. cit.* pp. 134-135.

<sup>117</sup> Teachout *op. cit.* p. 130. A Georgia statistician calculated approximately 4.87 million living descendants of Revolutionary patriots, significantly exceeding the national population of about sixty million, suggesting extensive intermarriage among qualifying families.

<sup>118</sup> Davis. *Op. cit.* pp. 277-278.

<sup>119</sup> Weil (2013) *op. cit.* pp. 139-140.

## 2.6. The Centennial Effect

The 1876 American centennial marked a critical moment in genealogical development. As previously discussed, lineage-based organizations proliferated, establishing formal structures that defined their future for decades. With the centennial, a surge of national pride prompted Americans to identify with the country's founders. Sleeter postulates that this manifested as romanticized narratives of the country's founding and the creation of new national pride stories.<sup>120</sup>

Organizations such as the SR, SAR, DAR, Daughters of the Revolution (DR), Daughters of Union Veterans (DUV), and Sons of Union Veterans of the Civil War (SUVCW) were among the first post-American Civil War societies whose membership was based solely on lineage. By 1900, *The Patriotic Review* documented seventy heritage societies, half of which emerged in the 1890s.<sup>121</sup> In 1879, *The New York Times* observed, "We cannot well doubt the fact that our American people are taking far more interest in family history than ever before," noting the "progress of the historical spirit in our great middle class."<sup>122</sup>

Teachout argues that hereditary societies faced a paradox. They somehow needed to reconcile the historical values of genealogy. Values which implied pedigree hierarchy based on biology, with those of democracy, which hypothesized a social rather than biological world, and recognized individuals rather than families as its constituent parts.<sup>123</sup> The societies responded by insisting they were "essentially democratic in nature," countering charges of aristocratic leanings by maintaining that their organizations were not designed to mark social differences.<sup>124</sup> The SAR and DAR positioned themselves as organizations dedicated to uncovering countless acts of daily heroism, taking pride in recognizing the private soldier on equal terms with the general. As one founder proclaimed, "We count no epaulettes."<sup>125</sup>

This democratic rhetoric operated alongside exclusionary practices. As Teachout shows, hereditary societies reconciled "the tradition of genealogy with the language and values of the American Revolution by configuring the notion of a peculiarly American aristocracy."<sup>126</sup> By shifting the meaning of Americanism away from democracy and toward the Revolution as a

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<sup>120</sup> Sleeter, Christine E. (2016) Critical Family History: Situating Family within Contexts of Power Relationships. *Journal of Multidisciplinary Research*. 8(1). pp.13-14. <http://www.jmrpublication.org>; accessed 17 October 2020.

<sup>121</sup> Bidlack (1983) Genealogy Today. p. 15. Doremus, Anna. (2018) The Evolution of the Revolution in the Centennial and Bicentennial Eras. *Furman Humanities Review*. 29(1). pp. 66-67. <https://scholarexchange.furman.edu/fhr/vol29/iss1/31>; accessed 15 July 2025.

<sup>122</sup> —, *The New York Times*. (1879) The Family Sentiment in America. *The New York Times*. 18 May. p. 6. <https://www.nytimes.com>; accessed 20 May 2021.

<sup>123</sup> Teachout *op. cit.* p. 128.

<sup>124</sup> Teachout *op. cit.* p. 129.

<sup>125</sup> Teachout *op. cit.* pp. 131-132. The SAR and DAR positioned themselves as organizations that proclaimed "the proved descendant of one [is] as welcome within our ranks as the descendant of the other," placing the most insignificant soldier alongside General Washington himself.

<sup>126</sup> Teachout *op. cit.* p. 135.

historical event, they created space for bloodline-based membership within a democratic political culture.

## 2.7. The Battle Over Blood: Defining Hereditary Membership

The early years of the lineage society movement revealed fundamental tensions over how hereditary organizations would define membership eligibility. As Strange documented in her detailed analysis of the DAR's formation, the organization nearly collapsed over debates about whether membership should extend to collateral descendants, those related through siblings of ancestors, or be restricted solely to lineal descendants in direct line of descent.<sup>127</sup> This controversy, which Strange termed "the battle over blood," exposed competing visions of what hereditary connection should mean for organizational membership.

Flora Adams Darling, one of the first DAR members, championed the strict linealist position and clashed repeatedly with fellow board members over the Society's acceptance of collateral descendants. Within a year of the DAR's founding, Darling departed to establish the rival Daughters of the Revolution (DR), announcing that her splinter organization would be restricted to "pure, lineal descendants."<sup>128</sup> The *New York Times*, which had been dismissive of the DAR from its inception, seized upon this affair as confirmation of women's political incompetence.<sup>129</sup> The controversy was finally resolved at the Society's third Congress in 1894, when delegates voted to amend the Constitution's original membership clause, thereby aligning the DAR with other lineal descent communities, including the SAR and the United Daughters of the Confederacy (UDC).<sup>130</sup>

Yet as Strange observed, genealogical eligibility alone proved insufficient for membership. Chapters retained authority to reject otherwise-qualified descendants "on the basis of dubious morals, unconventional tastes, or unpleasant dispositions," establishing the dual requirements of documented lineage and "personal acceptability" that would characterize hereditary organization membership throughout the twentieth century.<sup>131</sup> This combination of genealogical proof and social vetting created a system that was simultaneously more open than invitation-only social clubs (in that any descendant could theoretically apply) and more restrictive than

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<sup>127</sup> Strange, *op. cit.* p. 108.

<sup>128</sup> Strange, *op. cit.* pp. 113-114. Darling aired her linealist stance in the press, creating public controversy that threatened the organization's stability.

<sup>129</sup> Strange *op. cit.* pp. 113-114. The *New York Times* concluded that Darling's "friends are full of that martial spirit which converted the Battle of Bunker Hill into a glorious incident of the struggle for independence."

<sup>130</sup> Strange *op. cit.* p. 114. A former supporter of collateral descent stated at the 1894 Congress that the time had come to "submit loyally and gracefully to the will of the majority." Like Darling, the leadership wished to ensure that the DAR's "name may mean something," namely that its members were "in very truth Daughters of the American Revolution."

<sup>131</sup> Strange *op. cit.* p. 115.

purely achievement-based organizations (in that birth and social standing influenced acceptance even among genealogically qualified applicants).

The requirement for documented lineage represented only one barrier to hereditary organization membership. In practice, membership criteria extended beyond ancestry to encompass social standing: all the patriotic-hereditary groups maintained screening mechanisms that went beyond genealogical verification.<sup>132</sup> Social undesirability often extended to race and religion as well. For the most part, members were white and Christian, though exceptions existed.<sup>133</sup> The combination of genealogical requirements, documentation standards that favored families with institutional record-keeping, and social acceptability screening created overlapping barriers that effectively excluded most Americans from membership while maintaining the rhetorical position that membership was open to all who could document qualifying ancestry.

Initially, any organization with exclusionary practices, even if based on a social standing a person could achieve during their lifetime, was publicly criticized as undemocratic and un-American.<sup>134</sup> The use of genealogy by lineage organizations added a level of exclusion to their membership. Membership in a lineage society offered social standing and connections to the national historical narrative that they might not have otherwise had access to.<sup>135</sup> This status and common heritage bond strengthened connections within these organizations, suggesting that these ties were the reason many lineage societies have survived to this day, while other volunteer organizations have died out.<sup>136</sup>

The upheaval of social change at the turn of the 20th century, driven by large-scale urbanization and the movement of large numbers of people for work, was another factor in the growing popularity of genealogy. Cousins with a shared ancestry who did not know each other until joining the same organization bonded over their shared heritage. This gave rise to new feelings concerning what it meant to be an American, and in turn, what was essential to discover in one's genealogical research. The newly formed extended family created distinct divides between "true" Americans, those of African descent, and immigrants who were not of Northern or Western European descent.<sup>137</sup>

In his look at the evolution of genealogy in the United States, Weil noted that in some locations, this led to genealogy being used to promote nationalism and racial purity.<sup>138</sup> Northern cities,

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<sup>132</sup> Teachout *op. cit.* p. 121.

<sup>133</sup> Teachout *op. cit.* p. 125.

<sup>134</sup> Teachout *op. cit.* p. 112.

<sup>135</sup> Harper, Mercy. (2014) White Women's Heritage Organizations in Texas, 1870-1970. PhD Thesis, Rice University. p. 36. <https://hdl.handle.net/1911/77211>: accessed 3 December 2020.

<sup>136</sup> Harper *op. cit.* p. 50; see also the discussion of genealogical belonging in Chapter 1, Section 1.1.

<sup>137</sup> Strange *op. cit.* p. 106. Weil (2013) *op. cit.* p. 128.

<sup>138</sup> Weil (2013) *op. cit.* pp. 6, 128-129.

like New York, developed an upper class that strived to set itself apart through lineage to legitimize its societal position. Sven Beckert discusses this phenomenon, writing that those with the “proper” lineage could gain and keep positions of power within social circles and politics.<sup>139</sup> An article from *The Hartford Courant* dated 19 August 1897 stated, “It is to be hoped that the social and aristocratic side of these societies will not become too prominent, for the fact of American descent should be the controlling condition.”<sup>140</sup>

Historians today focus on the period of social unrest in the United States at the end of the 19th century to explain the emergence of organizations such as the DAR. Ken Chujo argues that the primary reason was patriotism, which often disguised itself as nationalism.<sup>141</sup> While exclusion is often discussed in the context of membership in lineage organizations, other volunteer organizations also commonly practice it, particularly those supporting conservative causes. However, these organizations were considered leaders in the interwar period (between WWI and WWII) who rooted out radicalism and decried welfare programs in the United States.<sup>142</sup>

## 2.8. Growth of Public Interest in Genealogy

As the population’s interest in genealogy increased at the turn of the 20th century, so did the interest in lineage and heritage societies. Scholars generally agree that the late 1800s through WWI was the height of civic engagement, volunteerism, and “associational activity.”<sup>143</sup> It has also been argued that the formation and availability of organizations were responses to the social turmoil of the time, affecting society as a whole.<sup>144</sup> The formation of organizations, clubs, and social events was one way to stabilize one’s social world, as migration and urbanization infiltrated the home once again.<sup>145</sup>

The First World War marked a transformation in American genealogical practice, catalyzing public interest in ancestral research and dramatically reshaping the institutional landscape of patriotic and hereditary organizations. This shift corresponded with immigration laws previously discussed and an increasing sense of national pride in the interwar period.<sup>146</sup>

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<sup>139</sup> Beckert, Sven. (2010) ‘Bourgeois Institution Builders: New York in the Nineteenth Century.’ In: *The American Bourgeoisie: Distinction and Identity in the Nineteenth Century*, S. Beckert and J. B. Rosenbaum, eds. New York: Palgrave McMillan. p. 110.

<sup>140</sup> ———, *Hartford Courant*. (1897) Patriotic Societies. *Hartford Courant*. 19 August. <https://www.proquest.com/historical-newspapers>: accessed 12 March 2021.

<sup>141</sup> Chujo, Ken. (2005) The Daughters of the American Revolution and Its Attitude Toward African Americans. *Transforming Anthropology*. 13(2). p.161. <https://doi.org/10.1525/tran.2005.13.2.160>: accessed 17 October 2020.

<sup>142</sup> Harper *op. cit.* p. 7. Harper (2014) *op. cit.* p. 50; see also the discussion of genealogical belonging in Chapter 1, Section 1.1.

<sup>143</sup> Gamm, Gerald and Putnam, Robert D. (1999) The Growth of Voluntary Associations in America, 1840-1940. *Journal of Interdisciplinary History*. 29(4). p. 518. <https://www.jstor.org/stable/206973>: accessed 10 February 2021.

<sup>144</sup> Gamm and Putnam *op. cit.* p. 549.

<sup>145</sup> Hackstaff, *op. cit.* p. 660.

<sup>146</sup> Larson, Cedric. (1937) Washington Is Genealogical Center of United States. *Evening Star*. 9 October. p.10. <https://www.genealogybank.com/>: accessed 22 May 2021.

Professional genealogical activity also intensified, driven by curiosity about possible European surname connections brought home by American soldiers' stories.<sup>147</sup> The internationalization of American military service during the world wars created new opportunities for transnational genealogical connections, as servicemembers encountered familiar surnames on overseas graves and monuments.<sup>148</sup> Interest flourished in those families, often driving them to learn more about their family's past and whether there was a connection to those names from across the oceans.

Newspaper articles, from *The New York Times* and *The Washington Post* to local town papers, touted "ancestor worship societies," representing an expansion of genealogical practice and a muddled response to social mobility and class anxiety in American society.<sup>149</sup> According to Gabrielle Marie Jacobs, organizations such as the DAR and the National Society of Colonial Dames of America (NSCDA) played instrumental roles in expanding genealogical research beyond its traditional geographic and social boundaries.<sup>150</sup> These institutions served as critical nodes in a growing network of genealogical knowledge and practice, demonstrating attempts to democratize access to ancestral research while maintaining strict membership standards.<sup>151</sup>

After World War II, leaders of heritage organizations increasingly found themselves in a precarious position. They could no longer uphold segregation if they wanted others to see them as legitimate, genealogically focused organizations and not social societies that could exclude a person without justification. Unfortunately, Helen LaVille notes that chapters often practiced and upheld segregation and discrimination, forcing them to balance their members' desires with national organization requirements.<sup>152</sup>

Organizations that refused to discipline chapters that would not integrate or exclude members because they were unacceptable to the chapter's existing members allowed those chapters to continue in their established ways.<sup>153</sup> When these organizations attempted to change policy to align with the nation's changing needs, they discovered that members were often more loyal to their chapter's desires than to the national organization's guidance.<sup>154</sup> This frequently led to an outright refusal by white members to come to the table and work on mutual problems with minorities and other women deemed unacceptable.

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<sup>147</sup> — (1923) Demand For Family Trees Grows in Wake of War. *The New York Times*. 18 March. <https://www.nytimes.com>: accessed 5 March 2021.

<sup>148</sup> *Ibid.*

<sup>149</sup> Hertzler, J.O. (1939) American Ancestors Worship – Condensed from *The South Atlantic Quarterly*. *The Morning Call*. 29 August. p.10. <https://www.genealogybank.com/>: accessed 12 March 2021.

<sup>150</sup> Jacobs, Gabrielle Marie. (1906) How The American Millionaire Acquires A Pedigree of Worth. *The Washington Post*. <https://www.proquest.com/historical-newspapers>: accessed 22 May 2021.

<sup>151</sup> Weil (2013) *op. cit.* pp. 145-148.

<sup>152</sup> LaVille, Helen. (2017) *Organized White Women and the Challenge of Racial Integration 1945-1965*. p. 8. Cham, Switzerland: Palgrave McMillan.

<sup>153</sup> LaVille *op. cit.* p. 6.

<sup>154</sup> LaVille *op. cit.* p. 5.

However, interest and membership declined following World War II, with only seven lineage societies forming between the 1950s and 1960s.<sup>155</sup> Robert Putnam addresses possible civic reasons for this decrease in organizations in his book *Bowling Alone: The Collapse and Revival of American Community*. According to Putnam, four factors contributed to this transformation. First, double-income families led to limited free time. Next, the movement to suburban neighborhoods led to longer commutes. Then, an increase in television viewing rather than activities outside the home led to the fourth factor: a shift in younger generations' priorities away from civic participation.<sup>156</sup>

## 2.9. The Problem of Fraudulent Genealogies

As interest in genealogy increased, so did the negative consequences of an increase in the publishing of fraudulent genealogies. Having the proper lineage was a means for individuals to ascend the social ladder. A complex interplay among social forces, professional development, and organizational adaptation was emerging and shaping American genealogical practice through these pursuits.

The American elite often commissioned or wrote published family lineages. Prospective members of lineage societies frequently used these genealogies, which are still found in many genealogical libraries, as a convenient way to connect themselves to an ancestor whom the organization had already listed on its rolls of approved ancestors. The ability to document multi-generational descent signaled that the recipient was wealthy enough and had the leisure time to document their ancestors, which Eric Gardner noted, verified they were at least of the same social class as the ancestor.<sup>157</sup> This social function reinforced exclusionary practices while simultaneously creating institutional frameworks that would later support the democratization of genealogical research.

These published genealogies could be seen to suppress undesirable individuals or even to promote racist ideals.<sup>158</sup> Membership in heritage organizations was a way to influence popular public values and common political goals on a broader stage than most could achieve on their own or in smaller community settings.<sup>159</sup> Publications of these genealogies were frequently used to establish an ancestral connection, thereby enabling individuals to join an organization.

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<sup>155</sup> Petlewski, Kathy. (2019) The History of American Lineage Societies. *NGS Magazine*. 45(2). p.40. In comparison, 39 organizations were established during the twenty years from 1976 to 1996.

<sup>156</sup> Putnam, Robert. (2000) *Bowling Alone: The Collapse and Revival of American Community*. New York: Simon & Schuster. p. 283.

<sup>157</sup> Morgan (2010) *op. cit.* pp. 135–151. Gardner *op. cit.* p. 149.

<sup>158</sup> *Ibid.*

<sup>159</sup> Harper *op. cit.* pp. 5–7. Moran (2010) *op. cit.* pp. 141–142.

Eugene A. Stratton noted prospective members often tried to shoehorn their ancestors into an already published genealogy.<sup>160</sup> This practice produced untrustworthy genealogical knowledge, which was then perpetuated over the decades.

Those who could afford it turned to the growing availability of professional genealogists to assist with their research or to have genealogy research performed on their behalf.

Unfortunately, unskilled researchers often fall into the trap stated above of merging multiple individuals into a single lineage. According to Stephen B. Hatton, researchers needed to identify records, their contents, and the relevant information for the subject, and then accurately locate and retrieve them.<sup>161</sup> A competent genealogist's research skills can take years to develop, especially before the widespread digitization of documents and the ease of online interaction, when many records required for lineage verification were scattered across various repositories and jurisdictions, often at opposite ends of the country.<sup>162</sup>

According to noted genealogist Milton Rubincam, published secondary works were often found in books of approved genealogies published by lineage societies. These books, often called lineage rolls, are notable for containing frequent inaccuracies due to the varying genealogical standards among organizations and the period in which the information was submitted.<sup>163</sup> Over time, as genealogical resources became more accessible and research standards improved, lineage applications became more accurate in documenting an applicant's lineage. Even when someone created a genealogy from erroneous materials under pretenses, the membership conferred legitimacy on a person's social position within the "right" circles. Beckert argues that if the New York elite took the time to trace their genealogy, it would set them further apart not only from those of the "lower" class but also from each other.<sup>164</sup>

While some organizations, notably the Descendants of the Illegitimate Sons and Daughters of the Kings of Britain (also known in the genealogical world as the Royal Bastards or TRB), implemented strict scholarly standards in response to the genealogy accepted by most lineage societies, others maintained more flexible approaches to documentation. TRB's organizers were among a who's who in genealogy, with most coming from the American Society of Genealogists, which aims "to foster the highest standards of genealogical scholarship."<sup>165</sup>

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<sup>160</sup> Stratton, Eugene A. (1984) The Validity of Genealogical Evidence. *National Genealogical Society Quarterly*. December. 72(4). p. 275. <https://www.ngsgenealogy.org/>: accessed 9 November 2023.

<sup>161</sup> Hatton, Stephen B. (2019) History, Kinship, Identity, and Technology: Toward Answering the Question "What Is (Family) Genealogy?" *Genealogy*. 4 January. 3(2). p. 4. doi:10.3390/genealogy3010002: accessed 11 April 2020.

<sup>162</sup> Morgan (2010) *op. cit.* p. 148.

<sup>163</sup> Rubincam, Milton. (1973) A Program for Certifying Genealogists, Lineage Specialists, and Record Searchers. *National Genealogical Society Quarterly*. March. 61(1). p. 14. <https://www.ngsgenealogy.org/>: accessed 8 November 2023.

<sup>164</sup> Beckert *op. cit.* p.110.

<sup>165</sup> American Society of Genealogists. (2023) <https://fasg.org/>: accessed 9 February 2024. RoyalBastards.org. (2020) *History. Descendants of the Illegitimate Sons and Daughters of the Kings of Britain.* <https://royalbastards.org/history/>: accessed 9 February 2024.

Unfortunately, unscrupulous con men saw the opportunity to fleece unknowing researchers and patrons with personal, and often very wrong, family genealogies. The most notorious fraudster was Gustave Anjou (1863-1942, also known as Gustaf Ludvig Jungberg), who operated in the affluent circles of the East Coast of the United States.<sup>166</sup> Anjou provided his clients with extensive documents and research, filled with connections spanning time and geography, connecting them to as many notable and noble persons as possible. With the approval of these falsified lineages, organizations unknowingly perpetuated errors in their organizational genealogies for decades.

Donald Lines Jacobus, often referred to as the father of modern American genealogy, was the first genealogist to realize the issues with, and publish articles on, Anjou's fraudulent practices beginning in the 1930s.<sup>167</sup> This led him and others who sought greater professional accountability within the field to start considering the field's future and how they could shape it. One of the ways decided upon within the community was to increase the availability of learning opportunities, so professionals would have the education and training necessary to succeed in the growing genealogy field.

## 2.10. The Professionalization of Genealogy

The evolution of professional standards in genealogy reflects persistent tensions among academic credentials, scholarly endeavors, practical expertise, and amateur pursuits. Unlike traditional academic disciplines, genealogical competence has not been primarily validated through university credentials. Indeed, the absence of formal degree programs in American universities has necessitated alternative means of establishing professional authority.

Jacobus was among the first professional genealogists to advocate for education and professionalism in genealogy.<sup>168</sup> To further the education and prominence of genealogy as a field, Jacobus published *Genealogy Pastime and Profession* in 1930 and created *The American*

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<sup>166</sup> Goodwin, Aaron. (2020) Genealogical Fraud. *NGS Monthly*. 30 November. <https://ngsmoonthly.ngsgenealogy.org/genealogical-fraud/>; accessed 10 November 2023.

<sup>167</sup> This is a common statement made by prominent genealogical writers who personally knew Jacobus. However, I was unable to locate newspaper or journal articles supporting these claims. Often, Jacobus called out the misinformation and the publication but did not mention Anjou's name. Most modern researchers suggest the full extent of Anjou's fraud was not known until the 1990s. Jacobus first called out the publication of fraudulent genealogies in this TAG article: Jacobus, Donald Lines. (1935) Fraudulent Genealogies. *The American Genealogist*. Vol 12. pp. 65-67. <https://www.americanancestors.org/>; accessed 15 July 2025.

<sup>168</sup> Macy, Harry Jr. (1996) Recognizing Scholarly Genealogy and Its Importance to Genealogists and Historians. *New England Historical and Genealogical Register*. January. Vol. 150. pp. 8-28. <https://americanancestors.org/>; accessed 14 August 2024; National Genealogical Society. (2013) *National Genealogy Hall of Fame Members*. National Genealogical Society. [https://web.archive.org/web/20140309031552/http://www.ngsgenealogy.org/cs/halloffame\\_winners](https://web.archive.org/web/20140309031552/http://www.ngsgenealogy.org/cs/halloffame_winners); accessed 6 November 2020.

*Genealogist* (TAG), the first professional journal in the United States dedicated to the practice of genealogy.<sup>169</sup>

Building on this foundation, the Genealogical Institute on Federal Records was established at American University's Institute for the Preservation and Administration of Archives in 1950.<sup>170</sup> This institute was the premier school for archival training, and students were educated on the partnership of archivists and genealogists.<sup>171</sup> Today, it is known as the Genealogical Institute on Federal Records (Gen-Fed), which is still held annually at the National Archives and Records Administration (NARA).<sup>172</sup>

While Jacobus was promoting the value of standards and education, the American Society of Genealogists (ASG) was incorporated in 1946.<sup>173</sup> The organization dedicated itself to genealogical scholarship and promoting high research standards through publication. Their membership is capped at 50 lifetime Fellows, with new Fellows elected when a vacancy occurs. As there were no certifying bodies at the time of its foundation, being a Fellow of the ASG validated a professional genealogist's work and knowledge.<sup>174</sup>

As the professional framework continued to evolve, a balance was struck between the need for rigorous standards and the field's traditionally large number of hobbyists. The dichotomy between "professional" and "amateur" researchers often proved artificial, with professionals frequently emerging from serious amateur practice and those "amateurs" demonstrating considerable expertise.<sup>175</sup> This fluid boundary between professional and amateur practice enriched the field while complicating efforts to establish professional standards.

Genealogical community leaders sought a way to give employers confidence that they were hiring a trained professional. This led to the formation of two credentialing bodies in the 1960s for this purpose. The Board for Certification of Genealogists (BCG) and the International Commission for the Accreditation of Professional Genealogists (ICAPGen) admitted their first members in 1964, marking a pivotal shift toward structured professional validation.<sup>176</sup>

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<sup>169</sup> *The American Genealogist* (TAG) began in 1922 by Donald Lines Jacobus, originally known as the *New Haven Genealogical Magazine*, and became TAG in 1932. It explored and promoted scholarly genealogical work.

<sup>170</sup> Colket, Meredith B. (1951) The American University's First Institute in Genealogical Research. *The American Archivist*. April. 14(2). p. 142.

<sup>171</sup> *Ibid.*

<sup>172</sup> Genealogical Institute on Federal Records. (2025) *Gen-Fed*. <https://www.gen-fed.org/>: accessed 12 December 2025.

<sup>173</sup> American Society of Genealogists. (2023) *About the ASG*. American Society of Genealogists <https://fasg.org/about/>: accessed 15 July 2025.

<sup>174</sup> The ASG was incorporated eighteen years before the Board for Certification of Genealogists and the International Commission for the Accreditation of Professional Genealogists admitted their first credentialed practitioners in 1964. During this intervening period, election as a Fellow of the ASG represented the primary formal recognition of genealogical expertise in the United States. See Macy, *op. cit.* p. 10.

<sup>175</sup> Macy *op. cit.* p. 9. Rubincam (1973) p. 14. De Groot, Jerome. (2016) *Consuming History: Historians and Heritage in Contemporary Popular Culture*. 2nd ed. P. 71. London: Routledge.

<sup>176</sup> Board For Certification of Genealogists. (2025) *About BCG*. BCG <https://bcgcertification.org/about#history-of-bcg>: accessed 15 July 2025; International Commission for the Accreditation of Professional Genealogists. (2025) *Our History*. ICAPGen. <https://icapgen.org/our-history/>: accessed 15 July 2025.

BCG's Certified Genealogists (denoted by the postnominal "CG") must demonstrate research competency and agree to uphold their organization's genealogical standards.<sup>177</sup> ICAPGen's Accredited Genealogists (denoted by the postnominal "AG") require specialization in a specific area, rather than general genealogical knowledge.<sup>178</sup> By the end of 1966, 88 AGs had 100 accreditations.<sup>179</sup> Conversely, by 1972, BCG had credentialed 216 practitioners, reflecting the growing demand for professional validation and the field's increasing methodological intricacy.<sup>180</sup>

However, professional certification frameworks have faced ongoing challenges. Quality control was a persistent community-perceived challenge for certification bodies. Market dynamics affected the field through price competition from untrained practitioners willing to work at significantly lower rates than professionals. Finally, the lack of institutional recognition by traditional academic historians undermined genealogists' professional legitimacy.<sup>181</sup>

### 2.11. Crossroads of American Genealogy

The historical foundations of American genealogy and lineage societies established before 1970 created a complex institutional framework that embodied fundamental tensions within American culture itself. The paradox of democratic exclusion, organizations deploying democratic and patriotic rhetoric while maintaining bloodline-based membership restrictions, emerged as a defining characteristic of the hereditary organization subculture during this formative period.

Genealogy's transformation from informal family record-keeping to structured professional discipline demonstrates the field's growing sophistication and methodological rigor. Women's roles evolved significantly throughout this period, progressing from traditional family historians to experienced researchers who challenged academic boundaries and established genealogy as a legitimate scholarly pursuit. The proliferation of fraudulent genealogies and inconsistent documentation standards revealed both the social pressures driving genealogical research and the field's capacity for self-correction, as reformers like Jacobus established professional standards that would shape credentialing for decades.

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<sup>177</sup> Board For Certification of Genealogists. *op. cit.*

<sup>178</sup> International Commission for the Accreditation of Professional Genealogists. *op. cit.*

<sup>179</sup> Crandell, Jill N. (2014) *Our History*. ICAPGen. <https://icapgen.blog/our-history>: accessed 7 February 2024.

<sup>180</sup> Hoeve *op. cit.* p.216.

<sup>181</sup> Macy. *op. cit.* pp. 8-9, 13-14; Martin, Russell E. (2016) Historical Genealogy: The Evolving Definition and Uses of an Ancillary Historical Discipline. *Russian Studies History*. 55(1). p. 2. <https://doi.org/10.1080/10611983.2016.1214017>: accessed 14 August 2021. See also Chapter 6 for survey data on certification barriers and practitioner perspectives on professional credentialing.

Institutional foundations, documentation practices, and organizational structures established within the hereditary organization subculture before 1970 created the framework for subsequent transformations. The tension between exclusionary membership requirements and democratic rhetoric, the geographic disparities in record preservation between North and South, the competing approaches of hereditary organizations and Mormon genealogy, and the professionalization of genealogical standards all established conditions that the technological and social changes of the following decades would fundamentally challenge. The next chapter examines how these pre-1970 foundations encountered watershed transformations that would reshape genealogical practice, considering both how hereditary organizations adapted to changed conditions and how they maintained continuity with established practices and purposes.

## Chapter 3 The Reshaping of American Genealogy

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The years from 1970 to 2020 witnessed unprecedented transformations in American genealogical practice, catalyzed by cultural watershed moments, technological innovations, and shifting social demographics. This period saw genealogy evolve from a niche pursuit associated primarily with lineage societies and family pride into a mainstream cultural phenomenon that millions of Americans from diverse backgrounds have come to embrace.<sup>182</sup> Two pivotal events, the American Bicentennial celebration of 1976 and the groundbreaking television broadcast of Alex Haley's *Roots* in 1977, converged to create what might be described as a perfect storm in genealogical interest, permanently altering both who participated in ancestral research and how that research was conducted.<sup>183</sup>

The democratization of genealogy unfolded across multiple dimensions during this era. Institutional repositories, such as NARA, adapted to serve an increasingly diverse range of researchers.<sup>184</sup> At the same time, the LDS Church expanded its unparalleled collection of genealogical records and eventually made them freely available online.<sup>185</sup> Next, competing commercial platforms emerged to monetize the growing interest in family history, raising important questions about access and equity.<sup>186</sup> Meanwhile, new methodologies have been developed to address the unique documentation challenges faced by researchers from marginalized communities, particularly African Americans, navigating the documentary voids created by slavery.<sup>187</sup>

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<sup>182</sup> Bidlack *op. cit.* p.174. Bidlack documents that before the 1960s, “only people with leisure and financial independence did genealogical research in libraries,” with the pursuit largely connected to lineage society membership requirements.

<sup>183</sup> Bidlack *op. cit.* p.11. Bidlack confirms that the Bicentennial and *Roots* were the two defining events for genealogical growth in the 1970s, noting that “White Americans were just as inspired by Haley to search for their roots as were Black Americans, and genealogical and historical libraries saw their patrons double or triple in number.”

<sup>184</sup> Rhoads, James B. (1971) Genealogists and the National Archives. *National Genealogical Society Quarterly*. June. 59(2). p. 87. <https://www.ngsgenealogy.org>: accessed 8 November 2023. Rhoads documented NARA's recognition of the need to serve diverse researchers, including the appointment of Robert Clarke as a specialist in Black history, and called on professional genealogists to assist African American researchers in reconstructing their history.

<sup>185</sup> De Groot, Jerome. (2015) International Federation for Public Address: On Genealogy. *The Public Historian*. 37(3). p.114. <https://www.jstor.org/stable/10.1525/tph.2015.37.3.102>: accessed 17 December 2020. De Groot notes that since 1894, the LDS Church has collected and created genealogical records numbering around 150 million, with the church's FamilySearch platform providing free access to the world's largest genealogical collection online.

<sup>186</sup> McKay, Aprille Cooke. (2003) Genealogists and Records: Preservation, Advocacy, and Politics. *Archival Issues*. 27(1). p. 24. <https://www.jstor.org/stable/41102053>: accessed 20 October 2020. By October 2002, Ancestry.com had reached 850,000 paid subscribers, while the LDS Church's FamilySearch.com received nine million hits per day and was free to all users, illustrating the emerging divide between commercial and open-access models of genealogical research.

<sup>187</sup> See Section 3.2 of this chapter for discussion of the Freedman's Savings and Trust database, institutional adaptations for African American genealogical research, and the Congressional Ethnic Heritage Studies Program Act of 1974. On NARA's early recognition of this need, see Rhoads (1971), p. 87, who urged genealogists to take “a more active part in assisting black people in the reconstruction and examination of their own history.”

Technological developments fundamentally transformed research methodologies from early computational databases to internet connectivity, digitized records, and genetic testing.<sup>188</sup> The internet democratized access to historical records while simultaneously creating new challenges in information quality and verification. Media representations of genealogy, particularly in television programming, further popularized ancestral research while shaping the public's understanding of how family histories connect to broader historical narratives.<sup>189</sup>

Throughout these transformations, lineage societies confronted changing social attitudes and demographic realities while rallying against the stereotype of exclusivity.<sup>190</sup> These institutions implemented formal inclusion policies, often revealing persistent tensions between traditional institutional practices and contemporary values.<sup>191</sup> By 2020, American genealogical practice reflected both innovation and ongoing negotiations between individual research interests and institutional frameworks, between democratized access and methodological rigor, and between personal identity formation and collective historical understanding.

This chapter examines these multifaceted transformations, tracing how genealogical practice evolved from 1970 to 2020 in response to cultural shifts, technological advancements, and changing conceptions of American identity. These changes reflect not merely shifts in a hobby or pastime, but fundamental reconsiderations of how Americans understand and document their personal and collective past.

### 3.1. A Nation Celebrates

NARA anticipated a potential increase in genealogical interest from the Bicentennial celebrations and sought to drive public engagement, implementing specific initiatives to meet growing research demands.<sup>192</sup> The Smithsonian sponsored “Kin and Communities,” a three-day

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<sup>188</sup> Hershkovitz (2012) *op. cit.* p. 5. Hershkovitz positions genealogy as spanning 45 separate research disciplines, demonstrating how technological transformation has expanded genealogical practice far beyond its traditional archival foundations. These technological changes are examined in detail in this chapter.

<sup>189</sup> Scodari, Christine. (2013) Roots, Representation, and Resistance? Family History Media & Culture through a Critical Lens. *The Journal of American Culture*. 6 September. 36(3). <https://onlinelibrary.wiley.com/doi/full/10.1111/jacc.12025>: accessed 20 October 2021. Scodari provides a framework for understanding how popular engagement with family history through media can shape public perceptions of genealogical practice. See Section 3.5 of this chapter for detailed analysis of genealogical television programming.

<sup>190</sup> Survey and interview data presented in Chapters 7, 8, and 9 demonstrate that exclusionary behaviors reported by participants were more commonly attributed to individual members (14.0%) than to chapter-level institutional practices (8.1%), a statistically significant distinction (chi-squared = 42.86,  $p < 0.001$ ). This pattern suggests that national organizational policies have moved toward inclusion, even as interpersonal dynamics within local chapters continue to reflect broader social tensions. See Chapter 7 for full analysis.

<sup>191</sup> The NSDAR and GSMD case studies in Chapters 8 and 9, respectively, document how each organization adapted its verification standards, outreach efforts, and membership processes between 1970 and 2020 in response to changing social expectations and legal requirements. Political discrimination emerged as the most reported form of exclusion among survey participants, reflecting broader national polarization rather than institutional directives. See also Chapter 7 for survey data on these topics.

<sup>192</sup> *The Washington Post*. (1976) New Interest in Genealogy. *The Washington Post*. 13 December. <https://www.proquest.com/historical-newspapers>: accessed 11 March 2021.

event (14-16 June 1976), featuring workshops, lectures, films, and genealogical guides, all directed by Margaret Mead, the renowned American anthropologist.<sup>193</sup> During this event, Professor Allan J. Lichtman of American University reported an upsurge in examples of the new type of social history, which focused not on great people or significant moments, but on ordinary people in everyday life.<sup>194</sup>

Notable among NARA's initiatives was the systematic microfilming of Revolutionary War records in commemoration of the Bicentennial.<sup>195</sup> This preparation proved prescient, as the subsequent surge in research activity, particularly following the 1977 broadcast of *Roots*, exceeded institutional expectations. Similarly, the DAR began pulling together an agenda for the Bicentennial seven years in advance and, five years before the event, hired professionally trained staff to organize, catalog, and present the historical materials that individual members had donated to the organization since its founding in 1890.<sup>196</sup>

NARA reported in 1971 that 60% of researchers in its facilities conducted genealogical research, and that genealogists accounted for 73% of microfilm usage.<sup>197</sup> Looking forward, by the end of the 20th century, digital platforms like Ancestry.com had reached 850,000 paid subscribers, far surpassing the numbers seen in physical repositories decades earlier.<sup>198</sup> Those decades witnessed staggering growth in an industry that libraries had relegated to the back room until then.

By 1974, genealogy had become, according to popular media, the nation's third-largest hobby over the preceding decade, ranking behind only stamp and coin collecting.<sup>199</sup> As noted previously, the surge in genealogical research was often attributed to the nation's approaching Bicentennial, which sparked widespread interest in American heritage with individuals seeking to establish their ancestral lineage for membership in various historical, heritage, and lineage organizations.<sup>200</sup> The genealogical movement was expanding dramatically in America, with an estimated half a million amateur researchers exploring their past. Genealogical societies grew, with researchers participating in more than 700 societies and associations.<sup>201</sup>

The economic dimensions of genealogical engagement were significant. In 1974, American families researching their ancestry spent between \$100 and \$1,000 on professional genealogical

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<sup>193</sup> Shencker, Israel. (1976) Smithsonian Urges Public to Dig at the Family Tree. *The New York Times*. 17 Jun. p. 27. <https://www.nytimes.com>: accessed 20 May 2021.

<sup>194</sup> *Ibid.*

<sup>195</sup> *The Washington Post*. (1976) New Interest in Genealogy.

<sup>196</sup> Brown, Nona. (1975) The D.A.R. Museum: A Small Mystery in the Heart of Washington. *The New York Times*. 13 Jul. Section 10 Travel and Resorts p. 7. <https://www.nytimes.com>: accessed 11 March 2021.

<sup>197</sup> Rhoads (1971) *op. cit.* pp. 83-88.

<sup>198</sup> McKay *op. cit.* p.24.

<sup>199</sup> Yates, Ronald. (1974) Tracing Family Tree Can Be Fun...And Shocking: Ancestor Hunt Bares All; Great Grandma Was a What? *Chicago Tribune*. p.1. <https://www.newspapers.com>: accessed 10 March 2021; ——. (1976) New Interest in Genealogy.

<sup>200</sup> *The Washington Post*. (1976) New Interest in Genealogy.; Rhoads (1971) p.88.

<sup>201</sup> Yates. *op. cit.*

research. It was reported that professional genealogists charged between \$3 and \$10 per hour that year, equating to a full-time salary of \$6,000 to \$20,000.<sup>202</sup> This was above the US minimum wage as of 1 May 1974, at \$2 per hour, and on par with what a full-time librarian earned in 1975, depending on their location (\$6,178 to \$19,565).<sup>203</sup>

A 1977 Gallup poll indicated that 29% of Americans were “very interested” in tracing their family history, with another 40% “somewhat interested,” and 28% showing no such inclination, revealing comparable levels of interest across ethnic backgrounds.<sup>204</sup> By 1986, Charles F. Bryan reported research facilities engaged with diverse users, including “secretaries on their lunch breaks, lawyers on their days off, retired firefighters and doctors... high-school students conducting history projects, schoolteachers planning lessons, and professionals who trace people’s roots for a living.”<sup>205</sup>

Ten years later, more than 60 million Americans were writing family histories or creating family trees, making genealogy a pursuit surpassed in popularity only by coin and stamp collecting.<sup>206</sup> In the same year, NGS membership increased by 20% to 17,200; genealogical researchers accounted for approximately 60% of visitors to NARA; and the Library of Congress reported receiving four times as many requests for local history and genealogy books as for any other classification in its collection.<sup>207</sup> There was no sign of this trend slowing down as the new millennium approached. By 2002, the executives of online ancestry services estimated that about 60 million people in the United States were creating family histories, making it one of the country’s most popular hobbies.<sup>208</sup> Market research from 2012 claimed that genealogy ranked second only to pornography as the most searched topic online, a figure that, while widely cited, was characterized by De Groot as potentially “fanciful” though indicative of the industry’s substantial commercial viability.<sup>209</sup>

A 2012 market research study indicated that approximately 84 million people worldwide invested between \$1,000 and \$18,000 annually in ancestral research.<sup>210</sup> While the primary

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<sup>202</sup> Yates. *op. cit.*

<sup>203</sup> U.S. Civil Service Commission Bureau of Intergovernmental Personnel Programs. (1975) *State Salary Survey*. p. 69. <https://babel.hathitrust.org/cgi/pt?id=mdp.39015078163485&seq=5>: accessed 16 July 2025.

<sup>204</sup> Wee, Eric L. (1997) A Forest of Family Trees: Wealth of Computerized Data Helps Feed Rapidly Growing Interest in Genealogy. *The Washington Post*. 4 July. p. A17. <https://www.proquest.com/historical-newspapers>: accessed 13 April 2021.

<sup>205</sup> Bryan, Charles F. (1986) In My Opinion: What should we do about the “genies”? *History News*. January. 41(1). p. 31. <https://www.jstor.org/stable/42650196>: accessed 11 November 2023.

<sup>206</sup> Moore, Scott. (1997) Save Your Own Life: PBS Helps Dig Up Roots of Family Trees. *The Washington Post*. 2 February. p.DC6. <https://www.proquest.com/historical-newspapers>: accessed 10 February 2021.

<sup>207</sup> Roberts, Ju-Don Marshall. (1997) Roots Revisited: Filling In History’s Blank Spaces. *The Washington Post*. 22 February. p.3. <https://www.washingtonpost.com>: accessed 13 March 2021.

<sup>208</sup> Tedeschi, Bob. (2002) E-Commerce Report: Tapping the family tree in the digital era is now as easy as typing a surname into the computer. *The New York Times*. 23 September. p.C8. <https://www.nytimes.com>: accessed 13 February 2021. While it is not explicitly stated who gave this information in the article, the online platforms discussed were: MyFamily.com (the parent company of Ancestry.com at that time), FamilySearch.org, and Genealogy.com.

<sup>209</sup> Rodriguez, Gregory. (2014) How Genealogy Became Almost as Popular as Porn. *Time*. <https://time.com/133811/how-genealogy-became-almost-as-popular-as-porn/>: accessed 21 October 2020; De Groot (2015) pp.115-116.

<sup>210</sup> De Groot (2015) *op. cit.* pp. 115-116.

participant demographic has historically skewed toward older Caucasian researchers, in the internet age, white women over fifty-five were the largest demographic in 2015.<sup>211</sup> Projections showed this demographic would further grow by 36% by 2020, three times faster than other demographic segments.<sup>212</sup> This substantial economic commitment suggests a deeply embedded cultural practice rather than a casual interest.

While pre-1970 genealogical research was often associated with fulfilling membership requirements in hereditary societies, the Bicentennial period also saw lineage societies attempt to broaden their demographic engagement. Lineage organizations also saw spikes in membership requests due to these important historical events. Societies based on the Revolutionary War era used the Bicentennial theme to encourage Americans to research their ancestors connected to that period. They even urged states to create biographies of historic national figures.<sup>213</sup> Journalist Dorothy Gallagher observed in 1977 that the interest in genealogy among minorities led them to attempt membership in what were still seen as exclusive lineage societies.<sup>214</sup> Once again, genealogy took a step toward democratization, as genealogical research revealed common links to Revolutionary ancestors from whom the applicants and members shared descent.

### 3.2. The Impacts of *Roots*

The 1977 ABC broadcast of *Roots*, based on the novel by the same name written by Alex Haley, was a cultural phenomenon. Published in 1976 by Doubleday, *Roots* traced the lineage of a family over seven generations from enslavement to the present day. In its first year, *Roots* sold over 15 million copies and spent 4 years on *The New York Times* Best Sellers list.<sup>215</sup> In addition, Haley received a Pulitzer Prize Special Citation and the National Book Award Special Citation for History in 1977.<sup>216</sup>

*Roots* drew an estimated 130 million viewers across its eight episodes, reaching 85% of American households. It set television viewership records, demonstrating unprecedented public engagement with genealogical narratives.<sup>217</sup> The first episode alone attracted 67% of viewers in

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<sup>211</sup> De Groot (2015) *op. cit.* pp. 115-116.

<sup>212</sup> *Ibid.*

<sup>213</sup> Rhoads. (1971) *op. cit.* pp. 85.

<sup>214</sup> Gallagher, Dorothy. (1977) Tracing their roots. *The New York Times Magazine*. 20 Feb. p 218. <http://timesmachine.nytimes.com>: accessed 21 May 2021.

<sup>215</sup> Caryn, James. (2002) Critic's Notebook; Both Timeless and Timely: 'Roots' at Quarter-Century. *The New York Times*. 18 January. <https://www.nytimes.com>: accessed 25 April 2023. Sales and bestseller figures are widely reported across contemporary coverage; see also Delmont, Matthew F. (2016) Why Americans Forgot About 'Roots.' *The New York Times*. 27 May. p.A17. <https://nyti.ms/1U1Pcu0>: accessed 20 October 2020.

<sup>216</sup> The Pulitzer Prizes. (1977) Special Awards and Citations. *The Pulitzer Prizes*. <https://www.pulitzer.org/winners/alex-haley>: accessed 15 July 2025.

<sup>217</sup> Caryn (2002) *op. cit.*

Los Angeles and 60% in Chicago, far exceeding the 30% threshold typically considered successful for television programming of the time.<sup>218</sup> The mini-series broke audience records and was widely regarded as having a cathartic effect on race relations nationwide. *Roots* won nine Emmy Awards and established a new standard for historical programming.<sup>219</sup>

Contemporary reviews noted how *Roots* challenged the dominant cultural narratives of the time because, until its airing, enslaved people were most often portrayed as happy servants to their kind-hearted masters, not human beings suffering in conditions over which they had no control.<sup>220</sup> Matthew Delmont retrospectively assessed: “Roots was a hit because no one had ever read or seen anything like it.”<sup>221</sup>

Haley spoke on the universal appeal of genealogical research in a 1976 interview with Mel Watkins of *The New York Times*.<sup>222</sup> After authoring the novel, Haley discussed how his work inspired African Americans to learn more about their African heritage. The universal themes of lineage, oral history, and heritage in *Roots* resonated with many people, allowing the public to reflect not only on the human element of African American history but also on how that history bound people together through their shared plight.

Following the broadcast of *Roots*, libraries around the country experienced a substantial increase in visitors. Every library or historical society with a significant genealogical collection was overwhelmed by a wave of Americans seeking information about their ancestors.<sup>223</sup> Peggy Tuck Sinko, director of the genealogical section at Chicago’s Newberry Library, reported: “We experienced a 50% increase in visitors in February [1977] over [1976].”<sup>224</sup> Another librarian expected more than 1500 people to use their collection in 1977.<sup>225</sup>

NARA prepared free family history research packets in anticipation of increased interest following the *Roots II* broadcast in 1979, after experiencing a 70% increase in research requests following the original *Roots* broadcast in 1977.<sup>226</sup> James Walker, a NARA genealogy specialist, noted that by 1979, interest in genealogical research had grown sufficiently that NARA staff dubbed regular lunchtime researchers the “Genie for Lunch Bunch” because part-time

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<sup>218</sup> Brown, Lew. (1979) TV Sequel to ‘Roots’: Inevitable Question. *The New York Times*. 15 Feb. p. C15. <https://www.nytimes.com/1979/02/15/archives/tv-sequel-to-roots-inevitable-question-new-oral-memoir.html>: accessed 20 May 2021.

<sup>219</sup> *Ibid.*

<sup>220</sup> Delmont *op.cit.*

<sup>221</sup> *Ibid.*

<sup>222</sup> Watkins, Mel. (1976) A Talk With Alex Haley. *The New York Times Book Review*. 26 Sep. p. 10. <https://www.nytimes.com>: accessed 20 May 2021.

<sup>223</sup> *Ibid.*

<sup>224</sup> Cattani, Richard J. (1977) Interest in genealogy is increasing. *The Shreveport Times*. 3 Apr. p. 32E. <https://www.newspapers.com>: accessed 8 May 2021.

<sup>225</sup> Barnes, Valerie. (1973) Where Family Trees Grow. *The New York Times*. 15 Jul. p.76. <http://timesmachine.nytimes.com>: accessed 9 May 2021.

<sup>226</sup> *The New York Times*. (1979) Archives Offers Genealogy Data. *The New York Times*. 18 February. <https://www.nytimes.com>: accessed 15 March 2021.

researchers came in on their lunch breaks from nearby federal buildings to research their family history.<sup>227</sup>

Researchers at NARA were in their 20s and 30s, with equal representation of African American and Caucasian researchers, a pattern that did not conform to traditional patterns of participation.<sup>228</sup> Wrenette Whartenby, genealogy librarian at Shreve Memorial Library, reported that *Roots* had contributed to the influx of young people they had seen in the library's genealogy department.<sup>229</sup> The National Archives' appointment of Robert Clarke as a specialist in African American history demonstrates recognition of the need for targeted resource development.<sup>230</sup> This adaptation extended to state-level institutions, with organizations such as the Georgia Department of Archives and History offering specialized workshops for African American genealogical researchers.<sup>231</sup> Furthermore, in 1974, the Congressional Ethnic Heritage Studies Program Act was enacted "to encourage greater understanding of all ethnic backgrounds and roots of all American citizens."<sup>232</sup> The program disbursed over \$5.9 million in 140 separate grants to institutions across the country.

Unfortunately, critics accused Haley of plagiarism and fabrication of the story at the core of *Roots*. Historians and genealogists flocked to newspapers to share their opinions on whether the novel should be marketed as historical fact or historical fiction.<sup>233</sup> In her 1984 article in the *National Genealogical Society Quarterly* (NGSQ), Elizabeth Shown Mills, along with her husband, historian Dr. Gary B. Mills, was among the more vocal genealogical critics of how the novel's research was conducted.<sup>234</sup> Using *Roots* as an example, Mills dissected the novel, discussing which techniques of genealogical and historical research were effective and which were not. It was the perfect case study to demonstrate to novice and long-term genealogists how they should conduct proper historical research in a genealogical context. Mills took the view that the negative press and their assessment of lackluster historical research skills were yelling into the void. For the public, *Roots* had awakened something in them.<sup>235</sup>

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<sup>227</sup> *Tucson Citizen*. (1979) 'Roots' Spurs Genealogy Hunts. *Tucson Citizen*. 16 February. p.42. <https://www.newspapers.com>: accessed 8 May 2021.

<sup>228</sup> Moore, Bill. (1980) Genealogy Becoming Listed Among Top Hobbies: Americans Seek Roots. *Asheville Citizen-Times*. 20 January. <https://www.newspapers.com>: accessed 9 February 2021.

<sup>229</sup> *The Shreveport Times*. (1977) Shreve Librarian Notes New Interest. *The Shreveport Times*. 3 April. p. 32-E. <https://www.newspapers.com>: accessed 10 February 2021.

<sup>230</sup> Rhoads *op.cit.* pp. 85.

<sup>231</sup> White, Gayle. (1982) 'Homecoming' Takes Blacks Back To Their Past. *The Atlanta Constitution*. 19 April. <https://www.newspapers.com>: accessed 20 February 2021.

<sup>232</sup> Nobile, Philip and Kenney, Maureen. (1977) Congress Passed an Ethnic Heritage Studies Program Act in 1974 to Encourage Looking Backward: The Search For Roots, A Pre-Haley Movement. *The New York Times*. 27 February. p.150. <https://timesmachine.nytimes.com> : accessed 20 May 2021.

<sup>233</sup> Gouty, Melissa. (2021) What You Might Not Know About Alex Haley and Roots. *Medium*. 18 August. <https://medium.com/literature-lust/what-you-might-not-know-about-alex-haley-and-roots-6e26ac5a0fcc>: accessed 15 July 2025.

<sup>234</sup> Mills, Elizabeth Shown and Mills, Gary B. (1984) The Genealogist's Assessment of Alex Haley's Roots. *National Genealogical Society Quarterly*. March. 72(1). pp. 35-48. <https://www.ngsgenealogy.org>: accessed 9 November 2023.

<sup>235</sup> *Ibid.*

*Roots* and the Bicentennial catalyzed a fundamental reimagining of genealogical practice across ethnic boundaries in the last quarter of the 20th century. While *Roots* centered on African American family history, its impact extended beyond racial demographics, inspiring a heightened interest in family history research across diverse communities. This broad engagement challenged traditional paradigms of genealogical practice that had historically privileged certain narratives and documentation patterns.

Honor Sachs noted that during the 1970s and early 1980s, the genealogy craze saw Americans visiting repositories in droves to gain a deeper understanding of their ancestry.<sup>236</sup> This included a need to uncover personal stories and, for minorities, information linked to their ethnicities. This led to a surge in interest in non-Northern European white immigrant narratives. George Sims, Alex Haley's research assistant, stated in a 1976 *New York Times* article, "I can remember...when blacks didn't want to have anything to do with Africa."<sup>237</sup>

### 3.4. From Card Catalogs to Cloud Storage

The transformation of genealogical research from a paper-based, repository-centered practice to a digitally mediated activity unfolded over several decades. It reshaped not only how researchers discovered information but also how they validated, shared, and preserved family histories. This section traces the technological evolution of genealogical practice to its modern form.

#### 3.4.1. Early Computing and the Emergence of Digital Genealogy

The emergence of computational tools in genealogical research began in the late 1960s. Technology-savvy genealogists started by using mainframe computers to create genealogical databases.<sup>238</sup> This initial phase of technological adoption expanded significantly with the introduction of personal computers in the late 1970s, although their prohibitive cost (\$500–\$5,000) initially limited widespread adoption.<sup>239</sup> The 1980s marked a crucial transition period, as declining costs facilitated the integration of digital tools into genealogical practice. Storage costs decreased approximately 20% annually from the late 1960s onward, falling from \$110,000

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<sup>236</sup> Sachs, Honor. (2019) The Dark Side of our Genealogy Craze. *The Washington Post*. 13 December. <https://www.washingtonpost.com>: accessed 20 October 2021.

<sup>237</sup> Gamarekain, Barbara. (1976) Interest by Blacks in Genealogy is Gaining. *The New York Times*. p. 16. <https://www.nytimes.com>: accessed 20 May 2021.

<sup>238</sup> Cortada *op. cit.* p. 170; Robinson, Mona. (1982) Computerized Genealogy is Here. *Bedford Sunday Herald-Times*. 29 August. p. E8. <https://www.newspapers.com>: accessed 20 February 2021.

<sup>239</sup> Cortada *op. cit.* p. 171; Robinson, Mona. *op. cit.*

per megabyte in 1979 to less than \$25 by 2011.<sup>240</sup> This exponential decrease, coupled with the proliferation of personal computers (PCs), reaching 20% of American households by 1990 and exceeded 40% by 2000, fundamentally altered the landscape of genealogical research.<sup>241</sup>

As early as 1981, Jack McKay outlined the potential of PCs for genealogists in the *National Genealogical Society Quarterly*, signaling the profession's early awareness of computational possibilities.<sup>242</sup> Mona Robinson reported in 1982 that computers had already been used for a decade to compile surname lists, write family histories, and assemble census indexes, though early software designed by non-genealogist programmers had "notorious shortcomings."<sup>243</sup>

With the advent of CD-ROM technology in the 1980s, libraries began cataloging and compiling historical documents on disks.<sup>244</sup> Consumers increasingly invested in software and hardware to build family trees on their computers, creating a genealogical software business worth an estimated \$30 million annually before the rise of the internet.<sup>245</sup> By 1999, Broderbund's Family Tree Maker had evolved into a fifteen-CD-ROM package containing 1.5 billion names, including the digitized Social Security Death Index, international marriage records, American military records, and 900 years of birth records for the United States and Europe.<sup>246</sup> Other products followed suit, bringing previously inaccessible archival material directly into researchers' homes for the first time, though at a cost that still limited access.<sup>247</sup>

### 3.4.2. The Internet Era, Commercial Platforms, and Mass Digitization

Concurrently with these developments, consumer online services such as America Online, CompuServe, and Prodigy began their foray into genealogy. Services introduced genealogical tools to their subscribers, scheduling chat-room meetings, and creating databases that connected researchers who had previously worked in isolation.<sup>248</sup> As Karen Isaacson, manager of ROOTS-L, the largest online genealogy mailing list, observed in 1996, "Genealogy hit critical success in the past year because there are enough people out there searching and reading each other's

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<sup>240</sup> Cortada. *op. cit.* p. 171.

<sup>241</sup> Cortada. *op. cit.* p. 172.

<sup>242</sup> McKay, Jack. (1981) Personal Computers for Genealogists. *National Genealogical Society Quarterly*. March. 69(1). pp. 3-8.

<sup>243</sup> Robinson, Mona. *op. cit.*

<sup>244</sup> Tedeschi. *op. cit.*

<sup>245</sup> Tedeschi. *op. cit.*

<sup>246</sup> Biersdorfer, J. D. (1999) Family Tree Maker Software Now Has 1.5 Billion Names. *The New York Times*. 13 May. p. G5. <https://nyti.ms/3JymS6P>: accessed 12 April 2021.

<sup>247</sup> Biersdorfer, J.D. (2000) Extensive Genealogy Package With a Focus on Ellis Island. *The New York Times*. 2 March. p.3. <https://www.nytimes.com>: accessed 12 April 2021. Sierra Home's Generations Family Tree Millennium Collection offered twenty-one CD-ROMs encompassing Civil War muster rolls, census images, and Ellis Island passenger lists, retailing at \$69.95. Individual CD-ROMs containing specific record sets could cost \$49.99 each.

<sup>248</sup> Weitzman, Jennifer. (1996) Drawing a Family History Out of Cyberspace. *The New York Times*. 13 June. p.C2. <https://nyti.ms/3JkKIS6>: accessed 11 April 2021.

questions that odds are somebody is going to have an answer.”<sup>249</sup> *The Washington Post* reported in 1997 that computers and the internet had “turbocharged interest” in genealogy, with new software enabling novices to organize family data that had previously required paper files, and membership in the National Genealogical Society increasing by 20 percent in a single year.<sup>250</sup>

Internet connectivity itself evolved from dial-up connections in the 1970s and 1980s to consumer-oriented private networks in the 1990s and finally to broadband access in the early 2000s.<sup>251</sup> Beginning with early listservs such as ROOTS-L in 1987, the field progressively adopted digital tools, leading to the emergence of dedicated genealogical websites following the public release of World Wide Web technology in 1993.<sup>252</sup> RootsWeb’s hosting of over 30,000 mailing lists by 1999 demonstrated the scale of collaborative genealogical networks, although this cooperation raised concerns about data quality and verification.<sup>253</sup>

Subscription-based commercial platforms transformed the economic landscape. MyFamily.com, the parent company of Ancestry.com until it was retired in 2014, reported approximately 850,000 paid subscriptions by 2002, with projected annual revenue of \$60 million.<sup>254</sup> The company began offering online subscriptions in 1997, charging between \$39 quarterly and \$189 annually for access to digitized records.<sup>255</sup> By 2002, family history emerged as one of the fastest-growing niches on the commercial internet, with high subscription renewal rates (70% at Ancestry.com) indicating strong consumer commitment.<sup>256</sup>

By the late 2000s, over 60% of American households had home internet access, while broader workplace and mobile access meant that approximately 80% of the population had some form of online access.<sup>257</sup> The digitization of historical records dramatically enhanced the accessibility of genealogical research. Ancestry.com digitized more than five billion records by 2011, transforming what would usually take weeks or months of dedicated archival research into minutes or hours on a computer.<sup>258</sup> De Groot argues that access to digital records and online research leveled the playing field, drawing people of all ages to genealogy in the twenty-first

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<sup>249</sup> *Ibid.*

<sup>250</sup> Wee, Eric L. (1997) A Forest of Family Trees: Wealth of Computerized Data Helps Feed Rapidly Growing Interest in Genealogy. *The Washington Post*. 4 July. p. A1 & A17. <https://www.proquest.com>: accessed 13 April 2021.

<sup>251</sup> Cortada *op. cit.* p. 171.

<sup>252</sup> Hershkovitz, Arnon. (2010) Genealogy, Internet, Ethics: Ethical Considerations for Today’s Professional Genealogist. *Association of Professional Genealogists Quarterly*. 25(4). pp.187.

<sup>253</sup> Hershkovitz (2012) *op. cit.* p. 189.

<sup>254</sup> Tedeschi. *op. cit.*

<sup>255</sup> Tedeschi. *op. cit.*

<sup>256</sup> Tedeschi. *op. cit.*

<sup>257</sup> Cortada. *op. cit.* p. 167.

<sup>258</sup> Russell, Natalie Ermann. (2011) Growing a Family Tree: TV Shows and Websites Make it Easier Than Ever to Walk in the Shoes of Our Ancestors. *USA Today Weekend*. 7 January. p.10. <https://newspapers.com>: accessed 26 March 2023.

century.<sup>259</sup> In 1999, Stephen Kyner, former editor of *Computer Genealogist Magazine*, stated prophetically that “The internet has helped democratize genealogy.”<sup>260</sup>

### 3.4.3. Challenges to Quality and the Technology-Tradition Balance

Digitization made accessing records easier. Researchers could conduct genealogy searches from the comfort of their own homes at any time of day. However, this continual digital access through paid and unpaid websites has given beginners a false sense that “everything” is online and digitized. While no one knows the exact percentage of online records, people often describe it as just the tip of the iceberg. Visits to physical repositories to gain a comprehensive understanding of their ancestry are still needed. As early as 1988, Marsha Hoffman Rising expressed concern that automated genealogical programs were slowing the pace of scholarship in the genealogical field by facilitating the rapid production of unsourced family trees, which could undermine the field’s methodological advances.<sup>261</sup>

The phenomenon of “genealojunk,” the propagation of unverified information through automated suggestion systems, represents a continuing challenge to maintaining scholarly standards. Experienced researchers expressed concerns about Ancestry’s algorithmic suggestions, which they metaphorically describe as “poison ivy” or “poison leaves,” potentially facilitating the uncritical acceptance of erroneous connections.<sup>262</sup> De Groot describes how the voluntary sharing of genealogical research data has become part of a broader phenomenon of “digital labor,” in which user-generated content from online activity is commodified by companies, challenging traditional concepts of historical research and public access to information.<sup>263</sup> The field continues to grapple with establishing appropriate models for maintaining research quality while facilitating broader participation.<sup>264</sup>

Critical family history approaches, as advocated by scholars such as Hackstaff, encouraged researchers to examine ancestral connections within the broader social, political, and economic contexts that shaped family narratives, rather than treating genealogy as a purely individualistic pursuit.<sup>265</sup> As Cortada observes, while IT tools have profoundly affected how research is done

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<sup>259</sup> De Groot (2015) *op. cit.* pp. 115.

<sup>260</sup> Hornblower, Margot. (1999) Genealogy: Roots Mania. *Time*. 19 April. <http://content.time.com/time>: accessed 9 Mar 2018. Stephen Kyner is quoted in this article.

<sup>261</sup> Rising, Marsha Hoffman. (1988) Computers and Genealogical Scholarship: Have the Twain Yet Met? *National Genealogical Society Quarterly*. September. 76(3). p. 227.

<sup>262</sup> Willever-Farr and Forte. *op. cit.* p. 481.  
[https://www.academia.edu/70853389/Family\\_Matters\\_Control\\_and\\_Conflict\\_in\\_Online\\_Family\\_History\\_Production](https://www.academia.edu/70853389/Family_Matters_Control_and_Conflict_in_Online_Family_History_Production): accessed 21 January 2021.

<sup>263</sup> De Groot (2015) *op. cit.* pp. 122.

<sup>264</sup> Willever-Farr and Forte. *op. cit.* p.484.

<sup>265</sup> Hackstaff *op. cit.* pp. 658-672.

and what kind of data can be collected, the core tasks and purposes of genealogical research remain unchanged.<sup>266</sup> Hershkovitz reinforces this point, noting that the internet has fundamentally changed the way hobbyists, academics, and professionals conduct research, yet the essential work of genealogy, which is verifying relationships, evaluating sources, and constructing accurate lineages, persists regardless of the medium.<sup>267</sup> The digitization of records has significantly reduced research cycle times, enabling quicker access to previously time-consuming archival searches. Combined with online platforms, digitization has also facilitated international research collaboration. However, as De Groot notes, the global reach of digital genealogical resources raises issues related to national identity, privacy, and the relationship between the state and corporations, presenting challenges in maintaining research standards across diverse cultural contexts.<sup>268</sup>

### **3.5. Religion in Genealogy**

The LDS church has played a pivotal role in developing and democratizing genealogical research. According to Samuel P. Hays, Utah has become the center of genealogical inquiry, hosting a variety of enterprises built around the Mormon Church's efforts to preserve ancestral records worldwide, as well as at their research facilities.<sup>269</sup> Unlike the hereditary organizations that form the primary focus of this study, whose genealogical infrastructure serves membership gatekeeping functions, the Mormon Church built its genealogical enterprise to serve a fundamentally different purpose: universal religious salvation through the identification and posthumous baptism of ancestors.

Elder Monte J. Brough, who served in the church's leadership in the mid-1990s, explained that "baptism for the dead" is a fundamental tenet of Mormonism, where church members stand in as proxies for deceased individuals. Mormon theology maintains that all individuals possess free agency and may accept or reject church membership even after posthumous baptism.<sup>270</sup> This theological framework necessitates the identification of ancestors, creating a religious imperative for genealogical research that extended across all social classes and ethnic backgrounds, rather than privileging particular lineages.

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<sup>266</sup> Cortada *op. cit.* p. 170.

<sup>267</sup> Hershkovitz (2010) *op. cit.* p. 181-182.

<sup>268</sup> De Groot (2015) *op. cit.* p. 127.

<sup>269</sup> Hays. *op. cit.* p. 38.

<sup>270</sup> Niebuhr, Gustav. (1995) Mormons to End Holocaust Victim Baptism. *The New York Times*. 29 April. p.9. <https://nyti.ms/3ldWENZ>: accessed 11 April 2021.

The Genealogical Society of Utah, founded in 1894, established what has become the world's largest repository of genealogical information in Salt Lake City.<sup>271</sup> Microfilming efforts by the church began in 1938 when it started systematically preserving genealogical records on a global scale.<sup>272</sup> Mormon representatives approached governmental units, political entities, or church organizations, offering microfilming services to preserve and protect their records at the church's expense.<sup>273</sup> In 1965, the church constructed a massive underground storage complex for records at a cost of \$2 million.<sup>274</sup> The church significantly democratized access to genealogical resources, enabling individuals without substantial financial resources or institutional connections to access historical records that would otherwise be inaccessible. By 1980, the library had already amassed over one million rolls of microfilm containing vital statistics of more than a billion people from sixty countries.<sup>275</sup> Often referred to as the "Mecca for genealogists," the Family History Library (FHL) receives thousands of visitors daily.<sup>276</sup>

Interest in Church resources surged following the broadcast of *Roots*. Thomas E. Daniels, spokesman for the Church's genealogical department, reported that microfilm record orders doubled within a month of the broadcast.<sup>277</sup> The FHL experienced a significant increase in attendance, from 800 visitors per day to 3,000, with peaks of 4,800, a dramatic rise directly attributed to the release of *Roots*.<sup>278</sup> By 1990, the library had information on over 1.5 billion people at more than 1,000 family history centers in forty-three countries.<sup>279</sup> The library's holdings had grown to 2.1 million rolls of microfilm records, nearly doubling the 1980 figure by 2001.<sup>280</sup>

A network of family history centers was established worldwide, making its resources accessible beyond Utah. These centers, staffed by volunteers, offer services to both Mormons and non-Mormons. Significantly, approximately 90% of library users are non-Mormons.<sup>281</sup> This overwhelming non-Mormon usage underscores the degree to which the church's genealogical infrastructure serves the broader research community rather than functioning as an exclusively denominational resource.

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<sup>271</sup> McKay, Aprille (2003) *op. cit.* p. 26. Guernsey, Lisa. (1999) The Line Is Out The Door At A Genealogy Library. *The New York Times*. 27 May. p. G3. <https://nyti.ms/3YDp4hC>: accessed 12 April 2021.

<sup>272</sup> Campbell, Sally S. (1982) Church's Library Stores Family Data. *The New York Times*. 24 January. p.9, sec. 23. <https://nyti.ms/3RnzaQr>: accessed 12 May 2021.

<sup>273</sup> Raine *op. cit.*

<sup>274</sup> Campbell. *op. cit.*

<sup>275</sup> Raine. *op. cit.*; Hays. *op. cit.* p. 38.

<sup>276</sup> Yates. *op. cit.*

<sup>277</sup> Cattani. *op. cit.*

<sup>278</sup> *Ibid.*

<sup>279</sup> *The Washington Post*. (1990) Hints From Heloise. *The Washington Post*. 3 June. p.8. <https://www.proquest.com/historical-newspapers>: accessed 12 April 2021.

<sup>280</sup> Hu. *op. cit.*

<sup>281</sup> Campbell. *op. cit.*

Technological innovations were freely adopted to further democratize genealogical research. A key framework that shaped the infrastructure of online genealogical research was data standardization, achieved through the 1985 introduction of GEDCOM (Genealogical Data Communication) by the LDS Family History Department.<sup>282</sup> GEDCOM was developed by the church but released as a freely available coding file type, establishing a crucial foundation for shared digital genealogical practice by enabling interoperability across genealogical software platforms.<sup>283</sup> In 1991, a computerized FamilySearch system was introduced to help visitors track their ancestors.<sup>284</sup> This system was later expanded to the internet in 1999 with the launch of [www.familysearch.org](http://www.familysearch.org). The launch attracted more web traffic than the library's servers could handle, providing millions of users with access to the world's most extensive genealogy library.<sup>285</sup>

The Mormon Church has made significant contributions to genealogical resources for underrepresented groups. In 2001, they released a database of 72,000 bank accounts opened by African Americans after the Civil War, drawn from the Freedman's Savings and Trust records.<sup>286</sup> These records, dating back to 1865, are particularly valuable because detailed records of African American families from that era are scarce. The computerized database, which took eleven years to compile, significantly simplified the research process for descendants of formerly enslaved people.<sup>287</sup> William A. Haley, son of *Roots* author Alex Haley, observed that the database removed the barriers of travel and cost that prevented most people from undertaking such searches.<sup>288</sup>

The Mormon genealogical enterprise illustrates how institutional infrastructure shapes access to the past. While the church built the world's largest genealogical repository and made it freely available to researchers of all backgrounds, hereditary organizations maintained separate verification systems and membership gatekeeping functions. Both the LDS Church and hereditary organizations depend on documentary evidence of lineage, yet they deploy that evidence for fundamentally different purposes: universal religious salvation in one case, exclusive membership validation in the other. This distinction reinforces the characterization of hereditary organizations as a bounded subculture operating with distinctive priorities within the broader genealogical landscape, as discussed further in the data chapters of this study.

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<sup>282</sup> De Groot (2015) *op. cit.* pp. 114-115.

<sup>283</sup> De Groot (2015) *op. cit.* p. 114.

<sup>284</sup> Ames, Lynn. (1991) The View From: The Mormons Family History Center; Searching Our Ancestors, Because 'Families Are Forever.' *The New York Times*. 17 October. p. WC2. <https://nyti.ms/3IxSGXU>; accessed 11 April 2021.

<sup>285</sup> Guernsey, Lisa. (1999) The Line Is Out The Door At A Genealogy Library. *The New York Times*. 27 May. p.G3. <https://nyti.ms/3YDp4hC>; accessed 12 April 2021.

<sup>286</sup> Hu. *op. cit.*

<sup>287</sup> *Ibid.*

<sup>288</sup> *Ibid.*

### 3.6. The Role of Media

Television programming from the 1970s to the 2020s contributed substantially to making family history more accessible and engaging to people of all ages and backgrounds. Genealogical television evolved from instructional programming to celebrity-driven entertainment and everywhere in between. By expanding public awareness, it generated scholarly debate about the tension between accessibility and rigor in the forum of multimedia production

The evolution toward entertainment-focused formats generated sustained scholarly criticism regarding the integrity of education. Hjorthen's critical analysis of the democratization paradigm in genealogical studies argues that scholars have too readily accepted narratives of genealogical accessibility without examining how commercial interests and institutional structures capitalize on popular longing while maintaining exclusionary frameworks.<sup>289</sup> Public historians identify a fundamental tension between accessibility and scholarly rigor that particularly affects genealogical programming, where practitioners must navigate the tension between personal experiences and the authority of scholarship and facts.<sup>290</sup>

The first recognized genealogical record-themed television program in the United States was *Ancestors*, which aired on the Public Broadcasting Service (PBS) in 1997, followed by a second season in 2000.<sup>291</sup> Rather than following celebrity narratives, *Ancestors* highlighted records available for genealogical research by taking viewers to repositories and teaching them how to use records effectively.<sup>292</sup> The History Channel's 2001 program *Family Tree* was the first to utilize the celebrity narrative in genealogical programming, bringing the field to a broader audience and emphasizing oral history's applicability across diverse research traditions.<sup>293</sup>

Transformation to storytelling in genealogical programming occurred between 2006 and 2012. Henry Louis Gates Jr.'s *African American Lives* series, debuting in 2006. It represented a shift toward minority research in public historical programming.<sup>294</sup> Gates prioritized historical investigation and personal narrative, combining genealogical research standards with genetic analysis to demonstrate modern research techniques accessible to viewers of all backgrounds.<sup>295</sup> Gates continued developing genealogical programming with *Faces of America* in 2010,

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<sup>289</sup> Hjorthen (2022) *op. cit.* p. 21.

<sup>290</sup> National Council on Public History. (2025) *About the Field*. NCPH. <https://ncph.org/what-is-public-history/about-the-field/>: accessed 28 July 2025; De Groot (2015) *op. cit.* pp. 102-127.

<sup>291</sup> Simmons, Dena. (2000) Second Ancestors Series Aired in June. *Y Magazine*. Summer. <https://magazine.byu.edu/article/second-ancestors-series-aired-in-june/>: accessed 16 July 2025.

<sup>292</sup> *Ibid.*

<sup>293</sup> *The New York Times*. (2001) How to Plant a Family Tree: From the Top. *The New York Times*. 16 September. <https://www.nytimes.com>: accessed 18 March 2021.

<sup>294</sup> Heffernan, Virginia. (2006) Taking Black Family Trees Out of Slavery's Shadow. *The New York Times*. 1 February. p.1E. <https://www.nytimes.com>: accessed 20 May 2023.

<sup>295</sup> Genzlinger, Neil. (2006) Prominent People Discover Relatives They Never Knew They Had. *The New York Times*. 29 January. p.2. <https://www.nytimes.com>: accessed 20 May 2023.

expanding beyond the African American experience to explore broader immigrant histories through the family stories of twelve prominent Americans.<sup>296</sup>

PBS further invested in the genre with *Genealogy Roadshow* in 2013, which took a different approach by focusing on everyday Americans rather than celebrities.<sup>297</sup>

The international success of the BBC's *Who Do You Think You Are?* (WDYTYA), which debuted in the United Kingdom in 2004, further demonstrated genealogical programming's mainstream appeal.<sup>298</sup> The American version, produced by Lisa Kudrow's production company, premiered on NBC in 2010, ran for three seasons before moving to TLC in 2013, and continued until 2018 before briefly returning to NBC in 2022.<sup>299</sup> According to Mike Ward, public relations director at Ancestry.com, which sponsored WDYTYA, the show "anecdotally opened up the world of genealogy to a younger demographic."<sup>300</sup>

Beyond the educational prevalence of most genealogical television, there has been an increasing awareness of the field and lineage organizations in the entertainment sphere. The *Gilmore Girls*, which ran for seven seasons between 2000 and 2007, broached the subject of DAR membership during their 6<sup>th</sup> season, putting it front and center into the minds of a new generation.<sup>301</sup> A decade later, HBO produced a 30-minute comedy show titled *Family Tree* in 2013, which followed Tom Chadwick (played by Chris O'Dowd) as he uncovers his ancestry through a series of eccentric family members.<sup>302</sup> But, more importantly, there is an increase in ancestry-influenced productions. While no official statistics exist on how many television and film productions use genealogical research as a plot device, a simple Google search unearths pages of hits. From the independent film *The Crickets Dance* (2021)<sup>303</sup> to Hallmark's *Family History Mysteries: Buried Past* (2023),<sup>304</sup> broadcast media exemplify how the ancestral hunt craze has permeated society.

Kramer argues that genealogy programs allow navigation and balance between personal stories and historical contexts, demonstrating how narratives shaped by mediatized genealogy provide

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<sup>296</sup> Public Broadcasting System. (2010) *Faces of America With Henry Louis Gates, Jr.* WNET.org Properties LLC. <https://www.pbs.org/wnet/facesofamerica/about/>: accessed 26 March 2023.

<sup>297</sup> De Groot (2015) *op. cit.* p. 112; Public Broadcasting System. (2013) *Genealogy Roadshow*. PBS. <https://www.pbs.org/show/genealogy-roadshow/>: accessed 1 April 2023.

<sup>298</sup> De Groot (2015) *op. cit.* p. 112.

<sup>299</sup> Zap2it.com. (2008) "Lisa Kudrow asks: 'Who Do You Think You Are?'" *Press-Register*. Mobile, Alabama. 17 March. p. 40. <https://newspapers.com>: accessed 26 March 2023; Jean-Philippe, McKenzie. (2022) Every Celeb You'll See on NBC's *Who Do You Think You Are?* (Updated). *NBC Insider*. <https://www.nbc.com/nbc-insider/who-do-you-think-you-are-nbc-2022-premiere-date-episodes-celebrities>: accessed 26 March 2023.

<sup>300</sup> Russell *op. cit.*

<sup>301</sup> Warner Bros. Entertainment, Inc. (2025) *Gilmore Girls Complete Series*. <https://www.warnerbros.com/tv/gilmore-girls>: accessed 20 December 2025.

<sup>302</sup> Hale, Mike. (2013) Searching for Roots, Finding Characters. *The New York Times*. 10 May. <https://www.nytimes.com>: accessed 20 December 2025.

<sup>303</sup> Film Freeway. (2025) *The Crickets Dance*. <https://filmfreeway.com/TheCricketsDance>: accessed 20 December 2025.

<sup>304</sup> Hallmark Media. (2025) *Family History Mysteries: Buried Past*. <https://www.hallmarkmystery.com/family-history-mysteries-buried-past>: accessed 20 December 2025.

accessible models for personal research while influencing public understanding of ancestral connections.<sup>305</sup> Academic critics argue that entertainment-focused formats can distort genealogical understanding by prioritizing dramatic narratives over complex research methodology, though these programs unquestionably educate viewers about historical events through the lens of personal family histories.<sup>306</sup>

### 3.7. DNA Testing and Family Research

DNA testing for genealogy represented a significant shift in how Americans conceptualize identity, ancestry, and heritage. The scientific groundwork for genetic genealogy was laid by the Human Genome Project (1990–2003), which made the laboratory processes required for ancestry-focused genetic analysis accessible. Two specific genetic markers drove early commercial applications: the Y chromosome, transmitted virtually unchanged from father to son, and mitochondrial DNA (mtDNA), passed maternally across generations with minimal alteration. Each capable of tracing a single-sex lineage through deep time in ways that paper records cannot.<sup>307</sup> The commercialization of DNA tests allowed an estimated 200,000 Americans by the mid-2000s and thirty million worldwide by 2020 to make ancestral discoveries through science.<sup>308</sup> With commercial testing services priced between \$100 and \$900 in the mid-2000s, companies combined direct-to-consumer testing with database networking, allowing customers to connect with potential relatives through online surname projects and public repositories.<sup>309</sup>

Demand for these tools emerged earliest and most urgently among African American researchers confronting the destruction and non-creation of records documenting enslaved people's identities and origins. As early as 2000, geneticist Rick Kittles at Howard University announced plans to offer DNA analysis linking African Americans to specific African regions, an effort that became the commercial company African Ancestry.<sup>310</sup> African DNA databases in the early 2000s were also insufficiently comprehensive to support definitive regional or tribal

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<sup>305</sup> Kramer, Anne-Marie. (2011) Mediatizing Memory: History, Affect, and Identity in Who Do You Think You Are?. *European Journal of Cultural Studies*. 14(4). p. 430. DOI: 10.1177/1367549411404616: accessed 20 October 2020.

<sup>306</sup> Albert, Jessica. (2025) *Celebrity Genealogy Shows – They're Not 'Just Like Us.'* History Associates International. <https://www.historyassociates.com/celebrity-genealogy-shows/>: accessed 28 July 2025.

<sup>307</sup> The genealogical implications of Y-chromosome and mtDNA testing are discussed in: Sykes, Bryan. (2001) *The Seven Daughters of Eve*. New York: W.W. Norton; and Harmon, Amy. (2006) *Love You, K2a2a, Whoever You Are*. *The New York Times*. 22 January. p.1, sec. 4. <https://www.nytimes.com/>: accessed 20 May 2023.

<sup>308</sup> Harmon. (2006) *Love You, K2a2a op. cit.*

<sup>309</sup> Alsever, Jennifer. (2006) DNA Kits Aim to Link You to the Here and Then. *The New York Times*. 5 February. p.5, sec. 3. <https://www.nytimes.com>: accessed 20 May 2023; Allyse, Megan A., et al. (2018) Direct-to-Consumer Testing 2.0: Emerging Models of Direct-to-Consumer Genetic Testing. *Mayo Clinical Proceedings: Symposium on Precision Medicine*. 93(1). pp. 113–120. [https://www.mayoclinicproceedings.org/article/S0025-6196\(17\)30772-3/fulltext](https://www.mayoclinicproceedings.org/article/S0025-6196(17)30772-3/fulltext): accessed 17 July 2025.

<sup>310</sup> Goldberg, Carey. (2000) DNA Offers Links to Black History. *The New York Times*. 28 August. p.A10. <https://www.nytimes.com/>: accessed 29 April 2023; Harmon, Amy. (2005) Blacks Pin Hope on DNA to Fill Slavery's Gaps in Family Trees. *The New York Times*. 25 July. p.A1. <https://www.nytimes.com/>: accessed 22 May 2023.

identifications. A match indicated probable ancestry within a sampled population while leaving open the possibility of closer matches from unsampled groups.<sup>311</sup> African Ancestry marketed explicitly to African Americans seeking connections to specific African regions, tailoring its services to a community with distinctive genealogical needs and emotional stakes.<sup>312</sup> These limitations did not diminish enthusiasm, because any ancestral connection carried psychological significance for those with no other means of accessing their heritage.

DNA testing technology represented one of the most significant advances in minority genealogical research since the publication of *Roots*. As *The New York Times* reported in 2005, the tests were fueling the biggest surge in African American genealogy in nearly three decades.<sup>313</sup> While scientific limitations prevented precise identification of tribal or regional African ancestry, African Americans increasingly embraced these tests. The tests also facilitated unexpected connections between ethnically different Americans, revealing complex familial ties rooted in slavery and forcing confrontations with that history, encounters that were not always welcome.<sup>314</sup>

Through genetic testing, DNA evidence acquired greater cultural authority than traditional documentary sources. Sandra Soo-Jin Lee, a bioethics anthropologist at Stanford University, observed in 2006 that "people feel they can ascribe greatness to themselves because it's inscribed in their genes... even though their actual lives may not reflect that."<sup>315</sup> Alondra Nelson's *The Social Life of DNA* (2016) demonstrated how genetic testing became entangled with racial reparations, reconciliation, and post-Civil Rights identity politics well beyond individual ancestry tracing.<sup>316</sup> This expansion of DNA's cultural authority generated significant scholarly concern. Kim TallBear argued in *Native American DNA* (2013) that commercial testing reproduced problematic assumptions about racial and ethnic essences, potentially reinforcing biological determinism in categories that were fundamentally social and political in their construction, a concern Christine Scodari echoed in *Alternate Roots* (2018).<sup>317</sup>

The rapid expansion of consumer genetic testing between the mid-2000s and 2020 transformed the broader genealogical landscape, placing hereditary organizations in an increasingly distinctive position. While millions of Americans embraced DNA as an accessible entry point to

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<sup>311</sup> Harmon (2005) *op. cit.*

<sup>312</sup> Alsever (2006) *op. cit.* Harmon (2006) *Love You, K2a2a op. cit.*

<sup>313</sup> Harmon (2005) *op. cit.*

<sup>314</sup> Harmon (2006) *Love You, K2a2a op. cit.*

<sup>315</sup> Harmon, Amy. (2006) Who's Your Great-Great-Great-Great-Granddaddy? *The New York Times*. 11 June. p.1, sec. 4. <https://www.nytimes.com/2006/06/11/weekinreview/11harmon.html>: accessed 20 May 2023.

<sup>316</sup> Nelson, Alondra. (2016) *The Social Life of DNA: Race, Reparations, and Reconciliation after the Genome*. Boston: Beacon Press.

<sup>317</sup> TallBear, Kim. (2013) *Native American DNA: Tribal Belonging and the False Promise of Genetic Science*. Minneapolis: University of Minnesota Press; Scodari (2018) *op. cit.*. TallBear's argument is also discussed in: Jassanoff, Maya. (2022) A Critic At Large: Our Obsession With Ancestry Has Some Twisted Roots. *The New Yorker Online Edition*. 9 May. <https://www.newyorker.com/magazine>: accessed 10 May 2022.

ancestral knowledge, hereditary organizations maintained documentary evidence standards rooted in paper-based verification systems developed over a century earlier. A divergence that underscored the bounded nature of the hereditary subculture within the wider genealogical ecosystem. The contrast was significant. While companies like AncestryDNA, Family Tree DNA, MyHeritage, and 23andMe built databases of tens of millions by lowering barriers to participation, hereditary organizations continued to require the painstaking assembly of paper trails connecting applicants to specific historical ancestors. Some hereditary organizations did begin to explore the evidential potential of DNA testing during this period, as discussed in the case study chapters that follow, but those explorations were careful and selective, focused on resolving specific documentary gaps rather than replacing documentary standards with genetic ones.<sup>318</sup> The democratization that DNA testing represented for millions of Americans thus operated in parallel with, rather than within, the hereditary organization subculture. A distinction with significant analytical implications for understanding how these organizations functioned within the larger genealogical field.

### 3.8. Ancestral Research and Volunteerism

The Bicentennial's influence on genealogical practice intersected with broader social movements in the United States, increasing the interest in ethnic heritage, growing awareness of Native American claims, shifting perspectives on American identity, and fundamental changes in women's civic engagement.<sup>319</sup> The period witnessed complex negotiations between traditional genealogical methodologies and emerging research needs, while genealogical organizations confronted unprecedented transformations in their volunteer base and organizational structures.<sup>320</sup> By the early 2000s, researchers began examining how volunteerism intersected with race, class, and generations, revealing the limitations of previous frameworks that had primarily focused on white, middle-class experiences. This work demonstrated that gender, race, ethnicity, religion, and social class have long stratified volunteering in the U.S., including in genealogical societies.<sup>321</sup>

The transformation of women's voluntary engagement profoundly impacted genealogical organizations, which had historically depended on female volunteers for their operation and growth. Volunteerism has been viewed as a gendered form of labor that provided women with

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<sup>318</sup> Zinck, Jennifer. (2019) Evolving Genealogical Evidence: DNA and Lineage Societies. *NGS Magazine*. 45(2). pp. 34–38. The DNA policy development of NSDAR and GSMD is treated in Chapters 8 and 9 of this thesis, respectively.

<sup>319</sup> Cortada. *op. cit.* p. 160.

<sup>320</sup> Sachs. *op. cit.*

<sup>321</sup> Chambré, Susan M. (2020) Has Volunteering Changed in the United States? Trends, Styles, and Motivations in Historical Perspective. *Social Service Review*. June. 94(2). pp.387-388. [https://www.researchgate.net/publication/342491169\\_Has\\_Volunteering\\_Changed\\_in\\_the\\_United\\_States\\_Trends\\_Styles\\_and\\_Motivations\\_in\\_Historical\\_Perspective](https://www.researchgate.net/publication/342491169_Has_Volunteering_Changed_in_the_United_States_Trends_Styles_and_Motivations_in_Historical_Perspective): accessed 5 August 2025.

alternative pathways to public influence during periods of limited professional opportunities.<sup>322</sup> Research into volunteerism was particularly relevant to genealogical societies, which long served as training grounds for women's leadership skills and provided platforms for addressing social issues.<sup>323</sup>

The 1990s witnessed a significant shift with the introduction of social capital theory by Robert Putnam, culminating in his publication, *Bowling Alone*. Putnam's framework positioned the decline in civic engagement, including volunteerism, as a crisis of democratic participation.<sup>324</sup> His analysis identified women's workforce participation as a significant factor in declining volunteerism, arguing that women's entry into the workforce reduced the pool of volunteers who had traditionally sustained civic organizations.<sup>325</sup> Putnam documented declines in traditional women's organizations, noting that membership in the National Federation of Women's Clubs had declined by more than 59% since 1964.<sup>326</sup> This decline had direct implications for genealogical societies, many of which experienced similar membership challenges.

However, Putnam's framework generated significant scholarly critique. Critics like Claude Fischer argued that his focus on traditional civic organizations failed to account for new forms of women's political engagement and overlooked the exclusionary practices of many historical voluntary organizations, including some genealogical societies.<sup>327</sup> Contemporary critiques highlighted that his work underestimated the impact of gender on civic engagement and failed to recognize that workforce participation by Gen X and Gen Y women opened additional paths for volunteerism, including new forms of genealogical engagement.<sup>328</sup> Feminist scholars increasingly emphasized how voluntary work had served contrasting functions for distinct groups of women. While middle-class white women used volunteerism in organizations such as lineage societies to exert public influence. Whereas women of color faced exclusionary barriers in these mainstream institutions, they often established parallel voluntary organizations to address community needs.<sup>329</sup> Anne Firor Scott's analysis documented how the voluntary sector's reliance on white women's labor simultaneously created opportunities for public

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<sup>322</sup> Jenner, Jessica Reynolds. (1981) Volunteerism as an Aspect of Women's Work Lives. *Journal of Vocational Behavior*. December. 19(3). p. 304. <https://www.sciencedirect.com/science/article/abs/pii/0001879181900658>: accessed 29 July 2025.

<sup>323</sup> Putnam, Robert D. (1995) Bowling Alone: America's Declining Social Capital. *Journal of Democracy*. 6(1). p. 73. <https://muse.jhu.edu/article/16643>: accessed 29 July 2025.

<sup>324</sup> Putnam (2000) *op. cit.* p. 65-66.

<sup>325</sup> Putnam (2000) *op. cit.* p. 66-67.

<sup>326</sup> Putnam. (2000) *op. cit.* p. 67.

<sup>327</sup> Fischer, Claude S. (2001) Bowling Alone: What's the Score? *Meeting of the American Sociological Association*. pp. 7-8. <https://www.erhsnyc.org/ourpages/auto/2016/2/26/54640880/BowlingAlone.pdf>: accessed 29 July 2025.

<sup>328</sup> Dael, A. Rima. (2024) Civic Engagement, Social Capital, and Robert Putnam's 'Bowling Alone' – A Critique. National Federation of Community Broadcasters, 9 September. <https://nfcbb.org/civic-engagement-social-capital-and-robert-putnams-bowling-alone-a-critique-by-a-rima-dael-nfcbb-ceo/>: accessed 30 July 2025.

<sup>329</sup> Scott, Anne Firor. (1993) *Natural Allies: Women's Associations in American History*. Urbana: University of Illinois Press. p. 53; Chambré *op. cit.* pp. 387–388. Morgan, Francesca. (2005) *Women and Patriotism in Jim Crow America*. Chapel Hill: University of North Carolina Press.

engagement and reinforced exclusionary boundaries.<sup>330</sup> However, Chambré's research demonstrates that gender, race, ethnicity, religion, and social class stratified volunteering for much of U.S. history.<sup>331</sup>

Since 2000, researchers have focused on organizational dynamics, driving changes in women's volunteerism, particularly the trend toward professionalization within nonprofit organizations. Stefan Toepler and Helmut K. Anheier's work on nonprofit management theory provided the theoretical framework for understanding how increasing complexity in funding partnership arrangements drove organizations toward more professionalized management.<sup>332</sup> Current research has documented how the professionalization of previously volunteer-run organizations creates tension between paid staff and volunteer workers within the same organizations, as volunteers find themselves working alongside paid staff with different training, expectations, and authority structures.<sup>333</sup>

The most recent scholarship challenges several assumptions about changes in women's volunteerism. Chambré's analysis argued that features attributed to contemporary volunteerism, including substantial turnover with often limited time available, were standard during early U.S. history.<sup>334</sup> She suggests changes in volunteerism may reflect ongoing improvements in data collection from researchers rather than perceived shifts in behavior patterns. Chambré identifies two significant changes in recent decades: "a sharp decrease in working class volunteering and an increase in the desire to 'give back' to causes and organizations that benefit themselves, friends, and family."<sup>335</sup> This analysis shifts attention from gender-based explanations to class-based interpretations, suggesting that economic inequality, rather than workforce participation, may be the primary driver of changes in volunteerism. Her findings showed a decline in volunteer rates from 15% in 1974 to 10% in 2002 among those who had not completed high school, while middle and upper-class women maintained stable levels of engagement.<sup>336</sup>

### 3.9. How Marginalized Groups Rewrote Research Rules

African American researchers faced unique challenges in accessing documentary evidence, necessitating innovative approaches to slave records, property documents, and oral histories.

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<sup>330</sup> Scott *op. cit.* p. 53.

<sup>331</sup> Chambré. *op. cit.* pp. 387-388.

<sup>332</sup> Anheier, Helmut K. and Toepler, Stefan. (2023) *Nonprofit Organizations Theory, Management, Policy*. New York, New York: Routledge. p. 16.

<sup>333</sup> Florentine Maier et al. (2020) Inside 'Pandora's Box' of Solidarity: Conflicts Between Paid Staff and Volunteers in the Non-profit Sector. *Frontiers in Psychology*. 3 May. 11(556). <https://pmc.ncbi.nlm.nih.gov/articles/PMC7212825/>: accessed 28 July 2025.

<sup>334</sup> Chambré. *op. cit.* pp. 387-388

<sup>335</sup> *Ibid.*

<sup>336</sup> *Ibid.*

The African American Historical and Genealogical Society (AAHGS), founded in 1977, emerged directly from the heightened interest in ancestral research that followed the release of the television miniseries *Roots*.<sup>337</sup> In 1979, the AAHGS was formally incorporated, and by 2023, 39 chapters had been established across the United States.<sup>338</sup> These chapters focus on African American genealogical research methodologies that address the unique documentation challenges stemming from slavery and segregation. These include the “Slave Research” approach, which utilizes plantation records, Freedmen’s Bureau documents, and oral histories to bridge documentary gaps.<sup>339</sup> Researchers also developed techniques to overcome the “brick wall” of 1870, the first U.S. Census to list formerly enslaved individuals by name rather than as property.<sup>340</sup>

The 1980s and 1990s witnessed a significant proliferation of ethnicity-specific genealogical organizations. The Genealogical Society of Hispanic America (GSHA) was founded in 1989 to preserve Hispanic family histories and develop specialized research techniques for navigating Spanish colonial records and addressing language barriers in documentation.<sup>341</sup> For Jewish researchers, organizations like JewishGen (launched online in 1987) were developed to address the distinct challenges of researching families affected by the Holocaust, pogroms, and forced migrations.<sup>342</sup> Native American genealogical research has been supported by tribal-specific organizations that emphasize the importance of understanding tribal enrollment criteria and navigating both federal documentation and oral traditions.<sup>343</sup>

The post-*Roots* genealogical landscape witnessed a parallel flourishing of organizations dedicated to European ethnic heritage, as descendants of Irish, Italian, Polish, German, Swedish, and other immigrant communities sought to document and celebrate their ancestral origins. Weil observes that as early as the late nineteenth century, Americans of diverse European origins “used genealogy to attempt to counterbalance what they perceived as the undue weight of Anglo-Saxonism in the US.”<sup>344</sup> This impulse accelerated dramatically following the 1970s

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<sup>337</sup> African American Historical and Genealogical Society. (n.d.). *About AAHGS*. <https://www.aahgs.org/>: accessed 12 November 2024.

<sup>338</sup> *Ibid.*

<sup>339</sup> Kearns, Andre. (2017) Successfully Researching Slaveholding Ancestors. *Medium* 28 March. <https://andrekearns.medium.com/successfully-researching-slaveholding-ancestors-7c54a0d2430b>: accessed 10 November 2024. National Archives and Records Administration. (n.d.). *Ethnic Heritage Research*. <https://www.archives.gov/research/alic/reference/ethnic-heritage>: accessed 12 November 2024.

<sup>340</sup> Louis-Jacques, Veronique. (2024) Breaking down the ‘brick wall’ of African American genealogy. *Daily Trojan Magazine*. 12 February. <https://dailytrojan.com/2024/02/12/breaking-down-the-brick-wall-of-african-american-genealogy/>: accessed 12 November 2024.

<sup>341</sup> Southern California Genealogical Society. (n.d.). *Genealogical Society of Hispanic America*. <https://www.scsgenealogy.com/genealogical-society-of-hispanic-america>: accessed 13 November 2024.

<sup>342</sup> JewishGen. (2008) Ancestry.com and JewishGen Align to Provide More Online Access to Millions of Jewish Historical Documents. *Press Releases*. 19 August. <https://www.jewishgen.org/jewishgen/pr/ancestry.08.08.htm>: accessed 14 December 2025; FamilySearch. (n.d.). *Societies*. <https://www.familysearch.org/en/wiki/Societies>: accessed 13 November 2024. Sometimes the date of founding is stated as 1985, which was the launch of *Avotaynu Magazine*, a Jewish genealogy publication.

<sup>343</sup> RootsWeb. (n.d.). List of Genealogical Societies. [https://wiki.rootsweb.com/wiki/index.php/List\\_of\\_Genealogical\\_Societies](https://wiki.rootsweb.com/wiki/index.php/List_of_Genealogical_Societies): accessed 13 November 2024.

<sup>344</sup> Weil (2013) *op. cit.* p. 135.

ethnic revival. Jacobson's analysis in *Roots Too* demonstrates how Ellis Island became symbolically central to this movement.<sup>345</sup> The proliferation of ethnic genealogical mailing lists in the early internet era illustrated the scope of this interest, with comprehensive directories listing "hundreds of ethnic, religious and national mailing lists" by the late 1990s.<sup>346</sup>

These European ethnic genealogical communities operated with membership structures quite different from hereditary organizations. Rather than requiring proof of descent from specific qualifying ancestors, they typically welcomed anyone with an interest in the relevant ethnic heritage, creating more permeable boundaries around community membership. However, scholars have noted complexities in how European ethnic genealogy functioned within American racial politics. The celebration of immigrant hardship and subsequent success could serve to distance white ethnic Americans from ongoing racial inequalities.<sup>347</sup> As Honor Sachs observes, genealogical engagement can simultaneously enable "those who have been historically denied access to ancestral legitimacy to claim status, inclusion and belonging" while also empowering "those who seek to divide, deny and disenfranchise."<sup>348</sup>

### 3.10. The Community in Family Research

The internet has accelerated the growth of ethnicity-specific organizations, allowing geographically dispersed researchers to form virtual communities focused on shared methodological challenges. By 2022, FamilySearch listed over 200 ethnicity-specific genealogical societies in its directory.<sup>349</sup> By 2008, there were over 700 websites devoted to Hispanic and African American research, 500 to Jewish families, and 600 to Native American genealogy.<sup>350</sup>

Critics have sometimes dismissed genealogical research as merely self-centered or a narcissistic preoccupation with one's origins. However, contemporary theoretical frameworks challenge this reductive view. Karla B. Hackstaff applies the sociological imagination to genealogical research, revealing how genealogical practices inevitably engage with historical inequalities and require researchers to confront the ways ancestral histories are embedded in broader sociopolitical contexts.<sup>351</sup> Yakel and Torres introduce the concept of "communities of records" to demonstrate how, through experience, genealogical researchers develop methodological

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<sup>345</sup> Jacobson *op. cit.* pp. 2, 4.

<sup>346</sup> Weitzman *op. cit.*

<sup>347</sup> Sachs (2019) *op. cit.* Nixon's 1970s dedication of the immigration museum used coded language about immigrants who "didn't come here for a handout" to distance white Americans from demands for social justice.

<sup>348</sup> *Ibid.*

<sup>349</sup> FamilySearch. (n.d.). *Societies. op. cit.*

<sup>350</sup> Cortada. *op. cit.* p. 160.

<sup>351</sup> Hackstaff *op. cit.* pp.662.

practices as a community, navigating through repositories and community institutions, gaining expertise that they can pass on to other researchers.<sup>352</sup> These communal practices extend beyond individual self-interest to create shared knowledge and mutual support networks.

Older genealogical societies have faced criticism for their historically exclusionary practices. As a result, minority groups sought their own research spaces. The Fred Hart Williams Genealogical Society, founded in Detroit in 1979, for example, focuses specifically on documenting African American lineages in Michigan, creating an alternative space for lineage recognition outside traditionally white-dominated organizations.<sup>353</sup> The National Genealogical Society did not actively address its past history with racial diversity in genealogical practice until the late 20th century. In May 2023, during a period of national reckoning with racial justice, NGS issued a formal apology for its past discriminatory practices and established a diversity initiative to promote inclusive genealogical research.<sup>354</sup> Consequently, ethnicity-specific lineage societies have emerged in response to exclusionary histories. Today, there are two lineage societies dedicated to African heritage: The Sons and Daughters of the U.S. Middle Passage and the Society of First African Families of English America.<sup>355</sup>

### 3.11. The State of American Ancestral Research

By 2020, American genealogical practice had undergone a remarkable transformation since the 1970s. What began as a surge of interest during the Bicentennial and following the success of *Roots* evolved into a sophisticated field, characterized by diverse participants, methodological innovation, technological integration, and institutional adaptation. The democratization of genealogical research, facilitated by digitization, genetic testing, media representation, and institutional outreach, expanded participation beyond the traditional demographic boundaries that characterized genealogical practices before 1970.

Tension between democratized access and methodological rigor remains a defining characteristic of contemporary practice. While digital platforms, commercial services, and genetic testing have expanded accessibility, they have simultaneously introduced new challenges related to documentation standards, verification processes, and research quality. The

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<sup>352</sup> Yakel, Elizabeth and Torres, Deborah A. (2007) Genealogists as a 'Community of Records.' *The American Archivist*. 70(1). p. 97. <https://www.jstor.org/stable/40294451>: accessed 17 December 2020.

<sup>353</sup> Sleeter, Christine. (2016) Recuperating Ethnic Identity Through Critical Genealogy. *Journal of Multidisciplinary Research*. Spring. 8(1). pp.49-50. <http://www.jmrpublication.org>: accessed 17 October 2020.

<sup>354</sup> Hartzell, Gillian. (2023); National Genealogical Society. (2023) Standards & Guidelines: Guidelines for Genealogical Self-Improvement and Growth. *National Genealogical Society Quarterly*. June. 90(2). p. 143.

<sup>355</sup> Sons & Daughters of the United States Middle Passage. (2025) About. <https://sdusmp.org/about/>: accessed 12 November 2024; Society of the First African Families of English America. (2025) About Us. *SOFAFEA*. <https://sofafea.org/index.cfm?fuseaction=Page.ViewPage&pageId=472>: accessed 12 November 2024.

field continues to navigate these tensions through professional development, educational initiatives, and institutional adaptation.

## Chapter 4 Methodology

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American genealogical practice during this period encompassed a diverse ecosystem of distinct communities, each with its own motivations, methodologies, and institutional structures.

Through a mixed-methods approach that incorporates surveys, interviews, and organizational case studies. Understanding how these organizations evolved between 1970 and 2020 addresses questions about how this genealogical subculture navigated the cultural transformations of that era, including the post-*Roots* genealogical boom, the rise of identity politics, and the emergence of DNA testing.

Methodological approaches acknowledge the complex interplay between individual motivations and institutional adaptations during significant cultural change. By triangulating multiple data sources and analytical methods, the research aims to provide a comprehensive understanding of how genealogical practices and membership in lineage societies reflected and shaped evolving conceptions of heritage and identity within this subculture. Subsequent chapters contextualize these findings within the broader genealogical landscape, drawing on existing scholarship to situate hereditary organization practices alongside other genealogical communities.

### 4.1. Research Questions

The study examines the evolving relationship between genealogical research practices and participation in lineage societies through five interconnected research questions, each paired with specific testable hypotheses. These questions emerged from the paradox of democratic exclusion identified in Chapter 1: the apparent contradiction between hereditary organizations' patriotic rhetoric celebrating American democratic values and their membership structures predicated on inherited bloodline.<sup>356</sup> As Teachout demonstrates, this tension was recognized immediately upon the organizations' founding in the 1890s, when critics argued that ancestry-based membership was fundamentally incompatible with democratic principles, and the organizations responded by insisting their purposes were patriotic rather than aristocratic and that their criteria were broadly inclusive, though in practice eligibility was largely confined to native-born white Americans with the documentary resources to navigate the application

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<sup>356</sup> See Chapter 1, Section 1.5, "The Paradox of Democratic Exclusion," for the full analytical framework. The concept draws on Teachout *op. cit.* p.128.

process.<sup>357</sup> Whether this tension persisted, evolved, or resolved during the transformative period from 1970 to 2020 forms a central concern of this investigation.

The research questions address individual motivations and institutional responses across multiple decades of social change. Understanding how hereditary organizations navigated cultural transformations (including civil rights movements, multiculturalism, identity politics, and technological change) illuminates broader questions about how voluntary associations balance tradition and adaptation, and how gatekeeping practices operate within organizations that claim democratic purposes.

**RQ1:** How did generational transitions, urbanization patterns, and family structures reshape individuals' engagement with genealogical research and participation in lineage societies?

*Hypothesis:* Increased urbanization and changes in family structure from 1970 to 2020 led to a decrease in direct knowledge transfer of family history between generations, resulting in a greater reliance on formal genealogical research methods.

**RQ2:** How did social mobility and economic resource patterns influence the individual capacity for and interest in pursuing genealogical research and lineage society membership?

*Hypothesis:* Higher disposable income and social mobility levels after 1970 correlate positively with increased membership in lineage societies.

**RQ3:** How did significant cultural movements and shifting dialogues around race, ethnicity, and identity transform individual motivations for genealogical research and institutional responses from lineage societies?

*Hypothesis:* This generates a three-part hypothesis. First, social movements of the late twentieth century led to increased diversity in participation in genealogical research. Second, structural changes in lineage society membership requirements occurred. Third, reformed documentation standards for proving lineage emerged.

This question addresses the democratic exclusion paradox most directly. Hereditary organizations have historically maintained that their membership criteria, documenting descent from historical populations, represent patriotic commemoration rather than social exclusion. The period under study witnessed sustained pressure on these organizations to reconcile their exclusionary membership structures with changing social expectations around inclusion and

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<sup>357</sup> Teachout *op. cit. op. cit.* pp. 125-126, 129-130. The rhetorical defense of inclusivity is set out at pp. 129-130; the practical limitations of that defense, including the racial and religious "acceptability" criteria that operated alongside genealogical requirements, are documented at pp. 125-126.

diversity. Examining how lineage societies responded to these pressures tests whether democratic values can coexist with hereditary gatekeeping or whether the tension identified by nineteenth-century critics remains fundamentally unresolved.

**RQ4:** How did the evolution of genealogy-focused media and popular entertainment influence public engagement with lineage societies and their application patterns?

*Hypothesis:* The popularization of genealogy through television programming and digital media after 1970 led to a demographic shift toward younger applicants and higher application rates during periods following major genealogy-focused media releases.

**RQ5:** How did the emergence of genetic genealogy transform traditional verification methodologies and encourage lineage societies and professional genealogists to reconceptualize standards of proof?

*Hypothesis:* The introduction of genetic genealogy testing after 2000 challenged traditional documentation standards, led to the development of hybrid verification systems, and increased the revision rate of previously accepted lineages.

These hypotheses were designed to be assessed using multiple complementary methodological approaches that, together, provide a comprehensive analytical framework. The research employs quantitative analysis of membership data and application patterns to establish baseline demographic trends and metrics over time. Qualitative analysis of institutional policies and procedures strengthens this quantitative foundation, revealing the underlying organizational frameworks that shape membership experiences and institutional culture.

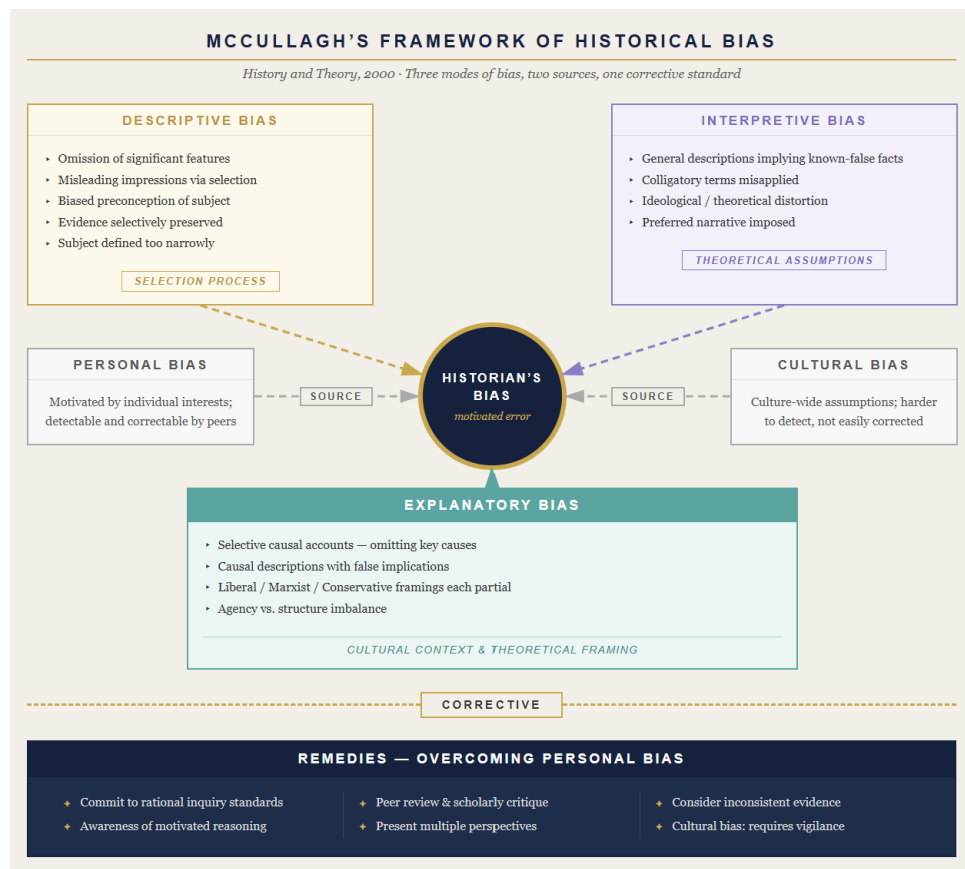
The methodology incorporates comparative analysis of verification standards before and after technological innovations, examining how institutional practices evolved in response to changing technological capabilities and social expectations. Demographic analysis of membership over time provides context for understanding shifting organizational priorities and representation. Content analysis of policy documents further supports these approaches, illuminating institutional narratives and evolving public positioning.

Statistical analysis of correlations between economic indicators and participation rates enables examination of external factors that influence organizational engagement, thereby providing a broader socioeconomic context for membership patterns and institutional sustainability.

Throughout this analysis, attention to the tension between democratic rhetoric and exclusionary practice provides a unifying analytical lens, connecting individual research questions to the broader question of how one influential genealogical subculture navigated the cultural transformations of late twentieth-century America.

## 4.2. Bias in Historical Evidence

The practice of genealogy and membership in lineage societies intersect with complex social and historical dynamics that can influence researchers, authors, and the general population. C. Behan McCullagh's framework on historical bias offers a systematic approach that distinguishes among descriptive, interpretive, and explanatory biases and provides methodological tools for each.<sup>358</sup> This framework emphasizes the evaluation of historians' selection processes, cultural contexts, and theoretical assumptions underlying their interpretations, as illustrated in Figure 2.



**Figure 2:** Adapted from C. Behan McCullagh, "Bias in Historical Description, Interpretation, and Explanation." *Descriptive, interpretive, and explanatory bias represent distinct modes through which motivated error enters historical accounts. Personal and cultural bias constitute the two sources from which such errors originate. Commitment to rational inquiry standards, peer review, and engagement with inconsistent evidence constitutes the primary corrective mechanisms. Based on McCullagh's frameworks, the types of bias that potentially appear in the primary research materials for this project fall into the first, second, and fourth categories. The authors consulted could easily have fallen into one of those three categories, thereby biasing the analysis of those works. The third category is absent, as it was presumed that all surveyed participants and interviewees provided information they believed to be true. Thus, the false information was not intentionally presented, as far as the research could determine.*

<sup>358</sup> McCullagh, C. Behan. (2000) Bias in Historical Description, Interpretation, and Explanation. *History and Theory*. February. 39(1). p. 40. <http://www.jstor.com/stable/2677997>; accessed 20 July 2025.

The most common biases in this study's research materials concern the interpretive frameworks that authors and historians bring to their conclusions. Newspaper coverage of genealogical topics and hereditary organizations illustrates this concern: journalists may present the facts they find in ways that reflect preconceived notions about genealogy, lineage societies, and their members, transmitting those biases into their reporting.

In his analysis of bias in digital newspaper archives, Jørgen Burchardt discusses two advantages of this research medium.<sup>359</sup> First, these archives provide access to a substantial number of newspapers that would otherwise be unavailable. Second, the digitization of newspapers enables more comprehensive analysis through keyword searches that manual searches cannot provide. However, the ease of data discovery can lead researchers to overlook biases introduced by digital records into their research. Digital archives can introduce bias into the selection of articles presented for research through the search features of these websites. Burchardt states that "seeking specific names or concepts can introduce biases" into the search results due to OCR errors or misspellings and identifications in the digital index for the newspapers.<sup>360</sup> Without the ability to create a comprehensive dataset from the chosen source, there is a risk of bias due to incomplete data collection and inaccuracies arising from researcher errors during cross-referencing and keyword searches.<sup>361</sup>

Secondary literature revealed bias stemming from societal assumptions and stereotypes about genealogical practitioners and members of lineage societies, as observed in Chapters 2 and 3, and in the case studies presented in Chapters 8 and 9. These manifestations center on gender roles, socioeconomic class distinctions, and racial dynamics. Analysis of these documents required situating them within their temporal context, acknowledging the evolution of societal practices through the research period, and considering their intended audience.

While triangulating multiple sources with diverse perspectives enhances historical analysis, it does not automatically neutralize bias. Instead, recognizing bias enables researchers to present a more nuanced interpretation of historical evidence. This approach provides readers with a comprehensive understanding of the complex social and cultural factors that have shaped the practice of genealogy and the development of lineage societies.

Primary documentation, including surveys, interviews, and organizational data, presents distinct methodological challenges. Andrew Holmes's comprehensive guide to researcher positionality,

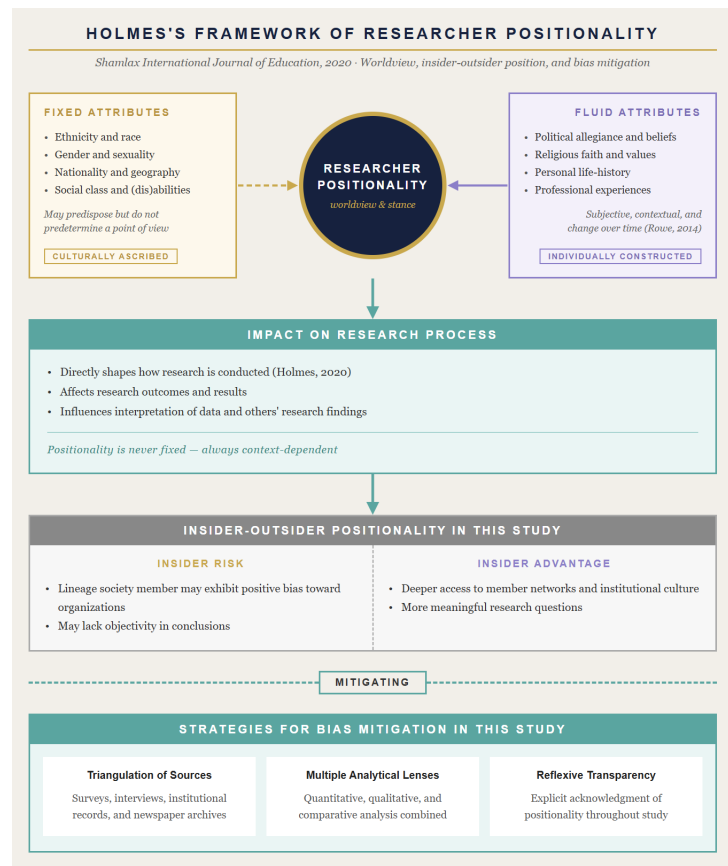
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<sup>359</sup> Burchardt, Jørgen. (2024) Source criticism, bias, and representativeness in the digital age: A case study of digitized newspaper archives. *From Experimentation to Experience: Lessons Learned from the Intersection between Digital Humanities and Cultural Heritage*. 29-31 May. Reykjavik, Iceland: Digital Humanities in the Nordic and Baltic Countries Publications. pp 1-2. <https://www.burchardt.name/source-criticism-bias-and-representativeness-in-the-digital-age-a-case-study-of-digitized-newspaper-archives/>: accessed 20 August 2025.

<sup>360</sup> Burchardt. *op. cit.* p. 1

<sup>361</sup> Burchardt. *op. cit.* pp. 2 & 12.

Figure 3, provides systematic frameworks for identifying researchers' worldviews, personal beliefs, and assumptions about how people interact with their environment and how this shapes research processes.<sup>362</sup> His rationale for the researcher's positionality directly affects the type of research conducted for this study: positionality directly influences "how research is conducted, its outcomes, and results."<sup>363</sup> While some forms of positionality are "fixed" (ethnicity, gender, or nationality) and may influence a person's point of view, it is essential to realize that those attributes will not lead to a predetermined view. For example, a lineage society member conducting research is likely to exhibit a positive bias and may not be objective in their conclusions. However, this research project draws on multiple perspectives and analytical analyses to mitigate potential researcher bias.

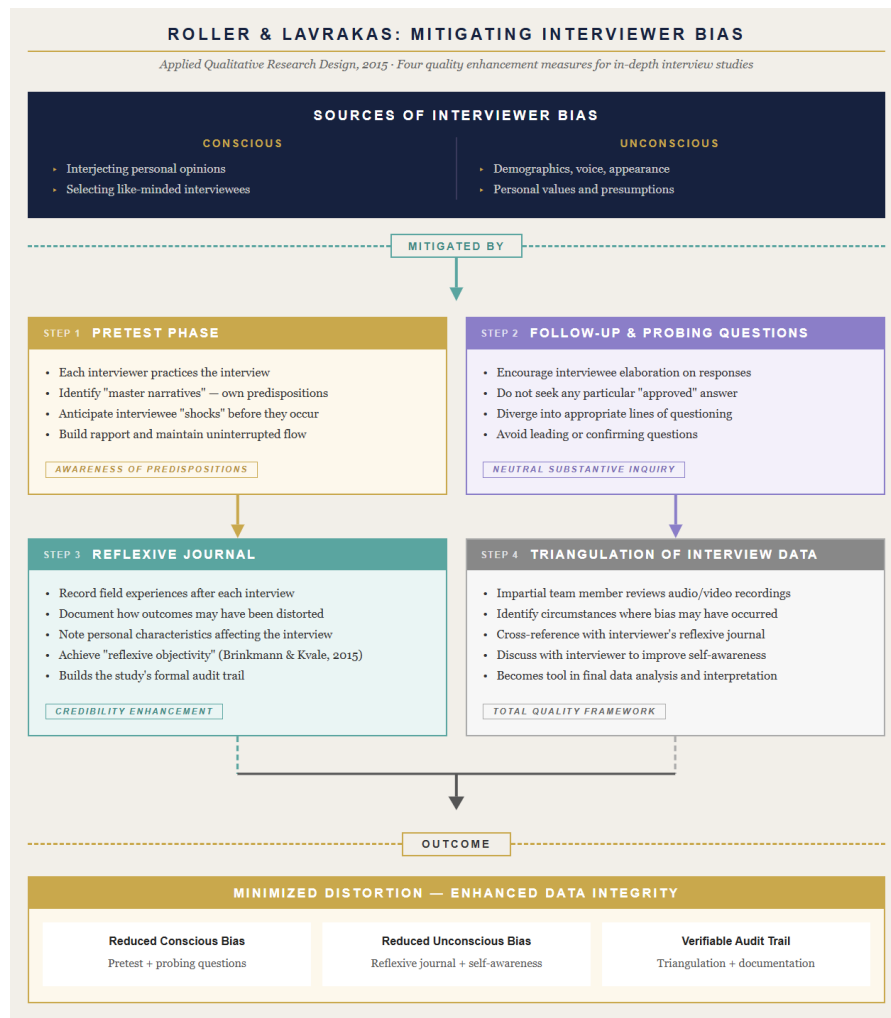


**Figure 3:** Adapted from Andrew Gary Darwin Holmes, "Researcher Positionality — A Consideration of Its Influence and Place in Qualitative Research — A New Researcher Guide." Fixed attributes such as ethnicity, gender, and nationality may predispose but do not predetermine a researcher's viewpoint. Fluid attributes, including personal history, political beliefs, and professional experience, shift over time and across contexts. Both streams shape how research is conducted, its outcomes, and the interpretation of results. Bias mitigation in this study draws on triangulation of sources, multiple analytical lenses, and explicit reflexive transparency throughout the research process.

<sup>362</sup> Holmes, Andrew Gary Darwin. (2020) Researcher Positionality – A Consideration of Its Influence and Place in Qualitative Research – A New Researcher Guide. *Shanlax International Journal of Education*. September. 8(4). <https://doi.org/10.34293/education.v8i4.3232>: accessed 20 July 2025.

<sup>363</sup> *Ibid.*

Interviewers can, unfortunately, consciously and unconsciously influence interviews for research and oral history. They can exert influence by interjecting their personal opinions on the subject or by selecting interviewees who also share their interpretations. According to Margaret R. Roller and Paul J. Lavrakas, there are steps an interviewer can take to minimize the influence of this bias, as shown in Figure 4.<sup>364</sup> From the training received through the Scottish Oral History Centre (discussed later in this chapter) and coursework at the University of Strathclyde, these steps were employed during the research process for this project.



**Figure 4:** Adapted from Margaret R. Roller and Paul J. Lavrakas, "In-Depth Interviewer Effects: Mitigating Interviewer Bias." Interviewer bias may arise from both conscious influences, such as interjecting personal opinions or selecting sympathetic interviewees, and unconscious influences, including demographic characteristics, voice, and personal presumptions. The four quality enhancement measures, pretest phase, follow-up and probing questions, reflexive journal, and triangulation of data, work in sequence to minimize distortion and strengthen the credibility and integrity of interview data.

<sup>364</sup> These steps were taken from a modified excerpt of the book *Applied Qualitative Research Design* by Margaret R. Roller and Paul J. Lavrakas. Roller, Margaret R. (2016) *In-Depth Interviewer Effects: Mitigating Interviewer Bias. Research Design Review: A Discussion of Qualitative & Quantitative Research Design*. 26 September. <https://researchdesignreview.com/2019/09/16/in-depth-interviewer-effects-mitigating-interviewer-bias/>: accessed 20 August 2025.

Survey responses reflect conscious and unconscious biases shaped by respondents' personal experiences with lineage societies and genealogical research. While the survey's anonymity protected respondents' privacy, it limited opportunities for follow-up clarification, potentially leaving unexamined response biases. Although data from interviews allows for deeper exploration, it requires careful consideration of how participants' narratives intersect with broader social and cultural contexts.

This study also consisted of publications and archival records from the NSDAR and the General Society of Mayflower Descendants (GSMD). These records provided membership information, bylaw updates, procedural changes for genealogical acceptance, and other relevant organizational details. Proceedings of the NSDAR's annual conference were available in the archives and digitally. Similar information for the GSMD was published in their quarterly publication, *The Mayflower Quarterly*, rather than in a standalone volume of the proceedings of their annual meeting or triennial conference.

Organizational publications and documents constitute another potential source of bias for lineage societies. While meeting minutes and proceedings often appear straightforward administrative records, analysis can reveal institutional biases in decision-making, policy formation, and record selection. Cultural bias in an archive refers to the ways in which items in the collection are interpreted within the institution or according to the researcher's cultural standards.<sup>365</sup> Hannah Grout discusses cultural bias, noting that while archives are typically seen as impartial repositories of 'truth,' their inherent bias arises when an organization decides what is and is not significant for preservation.<sup>366</sup> Because researchers see only items deemed sufficiently important to preserve for posterity, we do not know what was destroyed or otherwise disposed of. In this vein, research in institutional archives, such as the NSDAR or GSMD, may reveal cultural biases that should be considered alongside the archival information uncovered.

The methodological framework for bias recognition acknowledges that historical research cannot achieve perfect objectivity but can strive for transparency in identifying and analyzing the various forms of bias present in primary and secondary sources. Through this approach, the research aims to contribute to an understanding of how genealogical practices and membership in lineage societies have reflected changes throughout the period under study.

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<sup>365</sup> Grout, Hannah. (2019) Archiving critically: exploring the communication of cultural biases. *Libraries, Archives and Special Collections, Special Issue*. 21 June. 4(1). p. 71. <https://sparkjournal.arts.ac.uk/index.php/spark/article/view/120/214>: accessed 20 August 2025.

<sup>366</sup> Grout. *op. cit.* p. 73.

### 4.3. Ethical Protocols

This research was conducted in accordance with the *University of Strathclyde's Code of Practice on Investigations Involving Human Beings, Sixth Edition*.<sup>367</sup> This project required this code because it involves research on living beings. Before beginning data collection, the Faculty of Humanities and Social Sciences Ethics Committee required approval.

#### 4.3.1. Participant Protection and Informed Consent

All participants received a comprehensive *Participant Information Sheet* (Appendix 3) outlining the research objectives and data usage protocols. Upon confirming their interest, participants reviewed and signed consent forms/recording agreements, which included options for pseudonym assignment. Participants retained the right to withdraw from the study at any stage, in accordance with the GDPR, as approved by the University of Strathclyde's Legal Compliance Team in 2018.

#### 4.3.2. Risk Management

Although the project posed minimal ethical concerns, several protective measures were implemented to ensure participants' welfare and research integrity. Recognizing that discussions of personal histories and family lineages could trigger emotional responses, particularly when examining complex institutional relationships or challenging historical narratives, protocols were established to pause or end interviews if participants showed signs of distress. These protocols included the option for participants to resume conversations later, acknowledging that genealogical research often involves processing sensitive family information that may require reflection and emotional processing.

Given the researcher's position as a professional genealogist and active member of multiple lineage societies, it was inevitable that interactions would occur with individuals who know this researcher or have worked with them. They required careful management to maintain the integrity of the research. Rather than conducting direct interviews, which might have introduced bias or created uncomfortable dynamics due to existing professional or organizational connections, a volunteer-based approach was implemented. This allowed survey participants to

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<sup>367</sup> This research was created under the sixth edition of this document. As of the date of publication, the eighth edition was published. To learn more about the ethics process and to see the latest edition, please visit this website: <https://www.strath.ac.uk/research/researchknowledgeexchangeservices/universityethicscommittee/>

self-select for further engagement. This methodology ensured that all participants responded to identical questions while guiding the conversational direction based on their comfort levels and areas of expertise. This approach recognized the complex web of relationships inherent in genealogical research communities while preserving the authenticity of participant responses.

The study's participant criteria reflected careful consideration of vulnerable populations and research ethics. The study excluded individuals under eighteen years of age, those classified as vulnerable, and individuals with conditions such as dementia that might compromise informed consent or emotional well-being during discussions of family history. The recruitment process actively avoided discrimination based on race, gender, or socioeconomic status, with deliberate efforts to recruit a diverse group of participants who could offer varied perspectives on experiences within lineage societies and on genealogical research practices. This inclusive approach recognized that the democratization of genealogical research has broadened participation beyond traditional demographic boundaries, requiring research methodologies that reflect this expanded community engagement.

#### **4.3.3. Data Collection and Security**

Interviews were conducted digitally via Zoom or Google Meet, using my Strathclyde student account, which is protected under the University's Data Protection Agreement (established in June 2020), to ensure that encrypted and confidential data were stored securely. I offered no financial incentives for participation.

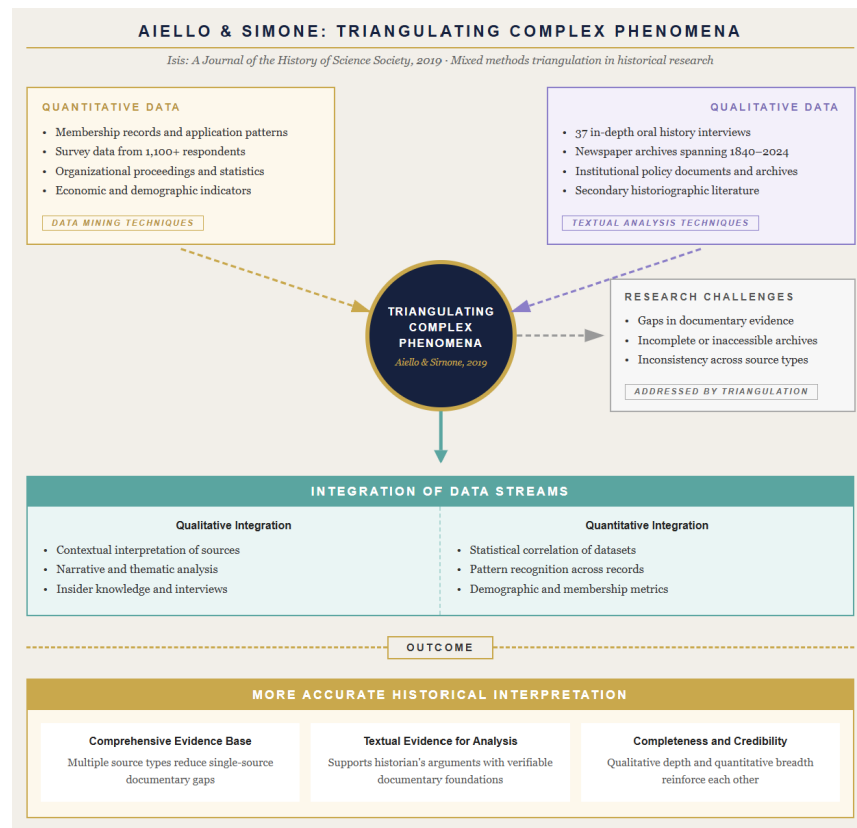
This methodological framework ensured adherence to ethical research practices while facilitating the collection of meaningful data from participants across various demographic categories. The letter approving the project by the University Ethics Committee is included in Appendix 4.

#### **4.4. Mixed Methods Approach**

While common in genealogical and historical research, the mixed-methods approach for this project was chosen because it allows the researcher to simultaneously explore historical topics at broad scales and an individual's account. Findings could be cross-checked against multiple data sources, making the conclusions more reliable overall. Integrating multiple types of data

analysis into a single approach is often referred to as triangulation by historical researchers.<sup>368</sup> Sidney Tarrow aptly describes it as an analysis technique that requires multiple methodologies, as any single approach would be insufficient.<sup>369</sup>

Historical research benefits from triangulation in mixed methods approaches, particularly in the textual analysis of documentation and collected data. Kenneth D. Aiello and Michael Simone argue that interpretations derived from this type of methodology yield more accurate historical research. While their article focused on research in the history of science and medicine, the techniques of textual analysis and data mining they employed informed some of the methods used in this paper.

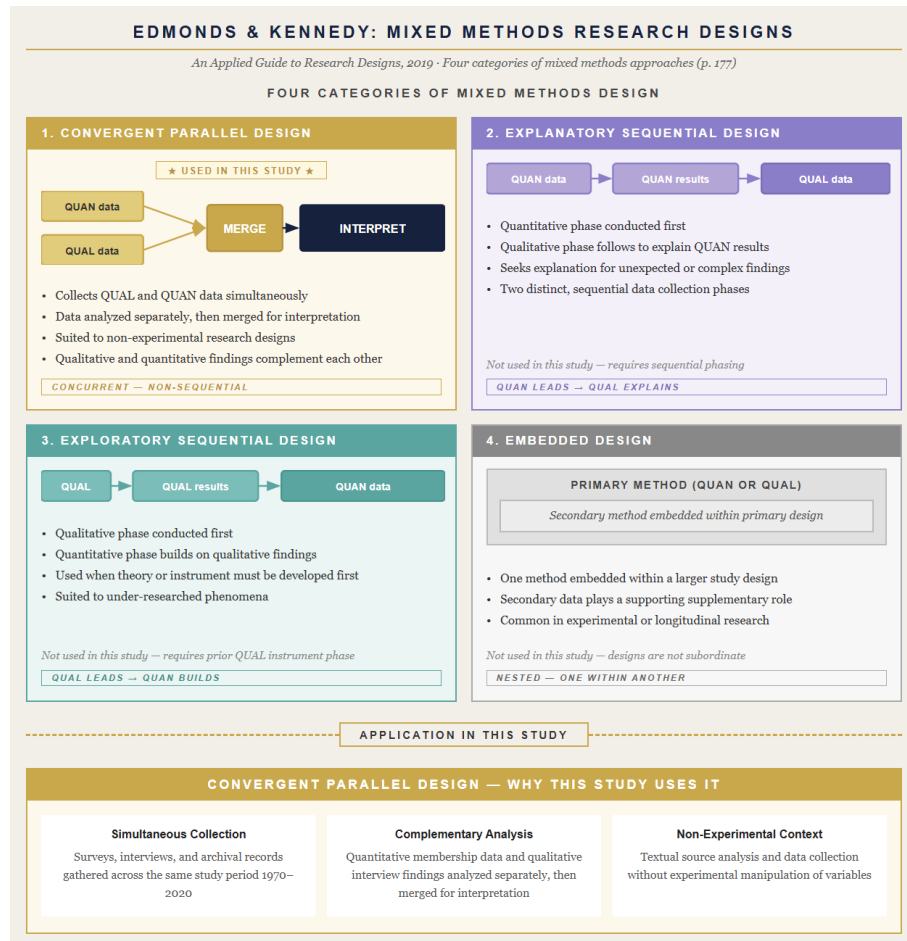


**Figure 5:** Adapted from Kenneth D. Aiello and Michael Simone, "Triangulation of History Using Textual Data." Aiello and Simone demonstrate that mixed methods triangulation, combining quantitative data mining with qualitative textual analysis, produces more accurate historical interpretations by compensating for gaps in documentary evidence. This study applies their approach by integrating survey data, membership records, interview transcripts, newspaper archives, and institutional policy documents into a unified analytical framework.

<sup>368</sup> Aiello, Kenneth D and Simone, Michael. (2019) "Triangulation of History Using Textual Data." *Isis: A Journal of the History of Science Society*. September. 110(3). <https://doi.org/10.1086/705541>: accessed 9 January 2024.

<sup>369</sup> Tarrow, Sidney. (2019) "Comparison, Triangulation, and Embedding Research in History: A Methodological Self-Analysis." *Bulletin of Sociological Methodology/Bulletin de Méthodologie Sociologique*. 14 January. 141(1). <https://doi.org/10.1177/0759106318812786>: accessed 9 January 2024.

However, this type of research has challenges. Most often, these concern the lack of, or difficulty in accessing, documentary evidence. This can lead to gaps in the collected data, leaving the research incomplete. Through the triangulation of sources, the researcher can successfully integrate qualitative and quantitative data, enabling a comprehensive exploration of the details of historical events and the available documentation. Aiello and Simone refer to this process as “triangulating complex phenomena,” combining quantitative and qualitative data analysis to provide the textual evidence historians use to support their analysis, as seen in Figure 5.<sup>370</sup>



**Figure 6:** Adapted from W. Alex Edmonds and Thomas D. Kennedy, *An Applied Guide to Research Designs: Quantitative, Qualitative, and Mixed Methods, 2nd ed.* The Convergent Parallel Design (highlighted) was employed in this study, enabling simultaneous collection and separate analysis of quantitative membership data and qualitative interview and archival sources, with findings subsequently merged for interpretation. This approach is standard in non-experimental historical research involving textual source analysis.

<sup>370</sup> Aiello and Simone *op. cit.* p. 523.

Figure 6 describes the four categories of mixed-method approaches.<sup>371</sup> Based on the definitions in the figure, this project employed a Convergent Parallel design. This design supports the collection of both qualitative and quantitative data on the same subject, and the two approaches complement each other. The data were analyzed both separately and simultaneously.<sup>372</sup> Researchers typically employ this approach in non-experimental research, which involves analyzing textual sources and collecting data to inform their findings.<sup>373</sup>

The data collected from the sources listed above were classified into genealogical-based or lineage-society-based categories. Although there was an overlap between the two subjects, this distinction enabled a breakdown into distinct subcategories and themes. Because the interest was in corresponding trends between the genealogical and lineage society communities, some subcategories were identical. These categories and subcategories are discussed further in the next section on data coding.

The themes for this research were identified during the literature review. These issues addressed perceptions of the “outside” world (i.e., those not involved in either group), the impact of advancing technology, the groups’ nationwide popularity, and trends related to minority involvement. The overarching themes identified during the coding of the survey, interviews, and literature review enabled tracking keywords throughout the review period and revealed patterns in the data. Figure 7 further demonstrates the Convergent Parallel Mixed Methods Design.

Quantitative data were collected via a questionnaire, followed by interviews with survey participants, lineage society members, and professionals in history and genealogy. Historical research served as the source for qualitative data collection. Information was collected from books, newspapers, journals, and other media sources, then analyzed separately from the survey and interview data.

Case studies based on data collected from the selected organizations were developed and integrated with the interviewees’ perspectives on the quantitative and qualitative data discussed above. This approach enabled the study of historical trends in genealogical and lineage societies without personal perspectives from survey respondents who subsequently chose to participate in an interview, thereby potentially influencing the analysis.

Proper coding and thematic analysis also enable a deeper understanding of the context of the items studied, providing a more profound meaning to the historical events. Contextualizing the

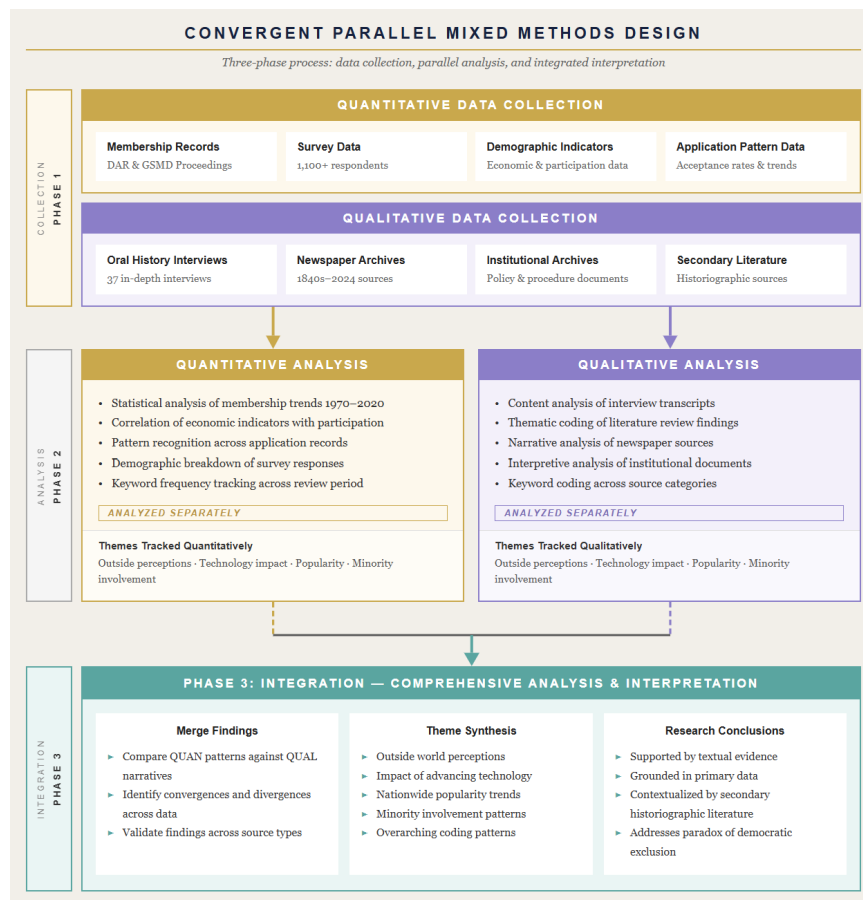
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<sup>371</sup> Edmonds, W. Alex and Kennedy, Thomas D. (2019) *An Applied Guide to Research Designs: Quantitative, Qualitative, and Mixed Methods*. London, United Kingdom: SAGE Publications Ltd. p. 177. <https://doi.org/10.4135/9781071802779>; accessed 20 September 2022.

<sup>372</sup> Edmonds and Kennedy. *op. cit.* p. 181.

<sup>373</sup> Edmonds and Kennedy. *op. cit.* p. 181.

data gathered facilitated the examination of events that affected genealogical and lineage society communities simultaneously and better situated them within a historical context, as discussed further in this chapter.



**Figure 7:** In Phase 1, quantitative and qualitative data are collected simultaneously from multiple repositories, including membership records, survey responses, oral history interviews, newspaper archives, institutional policy documents, and secondary historiographic literature. In Phase 2, the two data streams are analyzed separately using statistical, thematic, and content analysis methods, with both streams tracking the same four overarching themes: outside perceptions, technological impact, nationwide popularity, and minority involvement. In Phase 3, findings are merged and interpreted together to produce a comprehensive analysis grounded in both primary data and secondary scholarship.

#### 4.5. Data Storage

The raw data collected was stored on this researcher’s personal laptop and on Strathclyde’s OneDrive, both of which were password-protected. In addition, a backup of all data (ethics forms, signed “Participant Information & Consent” forms, recording agreement forms, oral recordings, and transcripts) was stored on a password-protected home server. Once the research was completed, the data was archived in accordance with the participants’ wishes and consent.

The mp4 files of the interview recordings from Zoom or Google Meet were transferred to a transcription service called Grain.<sup>374</sup> This free program produced an initial interview transcription, separating the speakers and assigning time codes at regular intervals. The transcription was not perfect, and errors were frequent due to the speakers' accents and the recording quality, especially when more than one person spoke simultaneously. However, having an initial transcription that needed formatting significantly reduced the time spent on transcriptions.

#### 4.6. Coding Framework

A coding manual was developed to analyze data from surveys, interviews, and research documents. As Johnny Saldaña defines, “A code...is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute based on visual data for a portion of language.”<sup>375</sup> As seen in Figure 8, the coding process progressed through three key stages: pre-coding, standardization, and software-assisted analysis.



**Figure 8:** Based on Johnny Saldaña, *The Coding Manual for Qualitative Researchers, 4th ed.* (Los Angeles: SAGE Publications, 2021), p. 4. Pre-coding involved first-pass review of all source materials and initial theme identification drawn from the literature review. Standardization involved developing a formal coding manual with consistent categories applied across surveys, interviews, newspaper archives, and institutional documents.

<sup>374</sup> Grain. (2018) <https://grain.com>: accessed 10 December 2022.

<sup>375</sup> Saldaña, Johnny. (2021) *The Coding Manual for Qualitative Researchers: 4th edition*. p. 4. Los Angeles: Sage Publications.

and institutional documents. Software-assisted analysis enabled keyword tracking and pattern recognition across the full 1970–2020 study period, with coded outputs feeding directly into the convergent parallel integration phase.

Pre-coding began with the initial analysis to identify potential quotations and to corroborate information across sources through standardization and the creation of primary codes. Survey responses were exported from Qualtrics as a .csv file and imported into Microsoft Excel for manual coding. This structured approach facilitated the development of code words and categorical classifications. A sample of the codes used is shown in Figure 9. The complete table is in Appendix 5, as previously stated.

**CODING MANUAL: DATA TYPES, CATEGORIES, AND CODES**  
Based on Saldaña (2021) · Codes applied across surveys, interviews, newspaper archives, and institutional documents

CATEGORIES	CODES	DATA TYPE
Genealogy-Based Organizations	Academic Studies · Interviews · Organization	
Adoptions	DNA · Lineage Research	
Applications	Genealogy Research Standards · Fraudulent Genealogy	
Certification	History of · Reasons for · Types of	
Conferences	Academic · Hobbyist	
Disciplines	Archives · Archivist · Define Discipline · Digital Humanities	
DNA	Consequences · Disproven Facts · Standards · Popularity	
Education	Academic Institutes · Perceptions of · Types of	
Event	US Bicentennial · US Centennial · Roots · Year 2000	
Media	Book · Publications · Reasons for · Popularity · TV · Companies	
Organizations	Founding of · Membership · Perceptions of	
Perceptions	By Academics · By Professionals · Stereotypes of	
Popularity	As Hobby · Democratization · Growth of · Reasons For · Worldwide	
Professional BCG	Board of Certification of Genealogists · Perceptions of	
Publications	Books · Genealogies · Internet · Journals · Scholarship	
Records	Accessibility · Democratization · Privacy · Repositories	
Repositories	Types of · Records in · Users of	
Research/er	Academic · Amateur · Community · Perceptions of · Skills	
Social Class	Elitism · Ethnicity-Based · Historical · Monetary-Based	
Technology	Computers · Crowdsourcing · Internet · Software · Types of	

■ Genealogy-Based   
 ■ Disciplines & Sources   
 ■ Organizations & Society   
 ■ Records, Research & Technology

**Figure 9:** The categories and codes created for this study are based on four data types: genealogy-based, organizations, academic studies, and interviews.

Unfortunately, I was unable to find a volunteer to assist with manual data coding. Accordingly, the decision was made to use an online program as the second coder. Atlas.ti platform was used

as a complementary tool for manual coding.<sup>376</sup> The program's artificial intelligence capabilities provided independent code suggestions and thematic identification, serving as a form of coding validation.

This project produced 25 categories and 238 unique codes. Saldaña suggests that studies typically generate 80-100 codes, resulting in 15-20 categories.<sup>377</sup> When researching the coding process in qualitative research, each resource developed its own guidelines for creating codes and categories. The common thread was that research needs to use as many or as few codes as necessary to analyze the data. While the numbers from Saldaña are reasonable, they represent an average and may not accurately reflect coding sets created for historical research.

#### 4.7. Survey

This study utilized Qualtrics, an online survey platform provided by the university, as its primary data collection tool. This software facilitated survey design, online distribution, and preliminary data analysis. Qualtrics included built-in anonymization features that stripped identifying metadata from responses and assigned each participant a unique identification number. Raw data was exported from Qualtrics in CSV format and analyzed using complementary tools.

The survey ran from 1 October 2021 to 31 March 2022, strategically coinciding with U.S. commemorative months for Family History (October), Black History (February), and Women's History (March). This timing enabled targeted recruitment through themed advertising and lectures presented to a diverse audience. From 1,375 initial responses, 210 incomplete or uninitiated responses were excluded, and 1,164 complete submissions were retained for analysis. A full list of the survey questions and total numerical responses for each question is in Appendix 6.

Recruitment through the social media networks of heritage and lineage organizations revealed the extent to which members anticipated scholarly criticism. When the survey was posted to Facebook groups associated with hereditary organizations, several responses illustrated skepticism toward academic research. One respondent asked, "Is this yet another woke academic attempt to portray those interested in genealogy and heritage as racist?" The phrase "yet another" indicates that members perceive a pattern of hostile scholarly treatment rather

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<sup>376</sup> ATLAS.ti (2023) Scientific Software Development GmbH. <https://atlasti.com/students-and-education>: accessed 25 January 2024.

<sup>377</sup> Saldaña. *op. cit.* p.25.

than reacting to this study.<sup>378</sup> Another assumed the research design predetermined its conclusions: “So to be succinct...you are searching for ways these groups are discriminating against others? That’s the gist of your thesis, right?”<sup>379</sup> A third respondent characterized the survey as “mocking those of us who are members of ‘hereditary’ organizations,” declining to participate on that basis.<sup>380</sup> These responses occurred despite the researcher’s identification as both a professional genealogist and a member of multiple lineage societies, suggesting that insider status alone could not overcome accumulated distrust of academic inquiry into these organizations.

Other respondents offered more supportive engagement, with one explaining to skeptics that demographic questions simply help “assure that a representative sample has been accomplished,” and another completing the survey while offering constructive methodological feedback.<sup>381</sup> This range of responses, from defensive refusal to collegial participation, itself illustrates the bounded nature of this subculture and the accumulated impact of decades of scholarly and media representations that members perceive as critical or dismissive. Rather than discouraging the research, these responses reinforced the importance of presenting evidence-based findings rather than confirming preexisting assumptions about these organizations.

As this was an open-access survey, it was not possible to calculate the response rate (i.e., the number of surveys completed divided by the number of invitations) to assess its success. However, the completion rate (i.e., the number of completed surveys divided by the number of started surveys) could be calculated. For this survey, the completion rate was 84.7%, which, according to Qualtrics, is exceptionally high. Their platform’s guide to survey creation stated that the average completion rate for an open-access survey is 20%-30%, with completion rates above 50% considered good.<sup>382</sup>

The survey consisted of four distinct sections: demographics, education, category self-identification, and category-specific questions. Parts 1-3 incorporated questions from the Fullerton Genealogy Survey, allowing for a comparative analysis of demographic shifts in genealogical research since 2001.<sup>383</sup> Part 4 required participants to self-identify within five

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<sup>378</sup> Response to survey recruitment post, Virginia Genealogy Facebook group, October 2021. Commenter names withheld to protect privacy of individuals who did not consent to participate in the research.

<sup>379</sup> Response to survey recruitment post, Boston University Genealogical Research Certificate Program Facebook group, October 2021. Commenter names withheld to protect privacy of individuals who did not consent to participate in the research.

<sup>380</sup> Response to survey recruitment post, Descendants of the Mayflower Facebook group, October 2021. Commenter names withheld to protect privacy of individuals who did not consent to participate in the research.

<sup>381</sup> Responses to survey recruitment posts, heritage organization Facebook groups, October 2021. Commenter names withheld to protect privacy of individuals who did not consent to participate in the research.

<sup>382</sup> Qualtrics. (2025) How to Increase Survey Response Rates. *Qualtrics.XM*. <https://www.qualtrics.com/en-gb/experience-management/research/improve-survey-response/>: accessed 20 July 2025.

<sup>383</sup> Drake, Pamela J., *Findings from the Fullerton Genealogy Study* (University of California Fullerton, 2001) <http://psych.fullerton.edu/genealogy/>: accessed February 2021

categories. Each section was estimated to take 5-10 minutes, with a maximum completion time of approximately 30 minutes. Participants could pause between segments if needed.

Analysis was primarily conducted using Elasticsearch. This is a web-based software program that correlates structured and unstructured data.<sup>384</sup> To analyze the survey data and compare them with the 2001 Fullerton Study, a series of statistical calculations was employed. In the analysis (chapters 5-7), the text will show the standard errors (SE) and confidence intervals (CI). These calculations were performed for survey analysis to demonstrate that the sample represents the entire population and to assess the reliability of the estimate. These calculations demonstrate that the sample is representative of the broader population and allow for an assessment of the reliability of each estimate. The z-score was used to standardize data points relative to the sample mean, expressing each value as the number of standard deviations it falls above or below the mean.

The SE quantifies the degree to which a sample estimate is expected to vary from the true population value. The CI, by contrast, defines the range within which the true population parameter is expected to fall at a specified confidence level, typically 95%. It is important to note that the closer the SE is to zero, the more precise the estimate; similarly, the narrower the CI, the more accurate the estimate. Together, these measures enable an assessment of the reliability of population-level conclusions drawn from the survey data. Further discussion of formula usage is provided in Appendix 7.

For this analysis, a 95% CI was applied, corresponding to a z-score of 1.96. The following formulas were used:

- The standard error (SE) for a proportion is calculated as:  $SE = \sqrt{(p(1-p)/n)}$ , where  $p$  is the proportion expressed as a decimal and  $n$  is the sample size.
- The confidence interval (CI) is then calculated as:  $CI = p \pm z \times SE$ , where  $z$  is the z-score (1.96 for a 95% confidence level).
- The chi-squared test was used to assess whether observed differences between groups were statistically significant or attributable to chance. The chi-squared statistic is calculated as:  $\chi^2 = \sum((O-E)^2/E)$ , where  $O$  is the observed frequency,  $E$  is the expected frequency, and  $df$  denotes the degrees of freedom.

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<sup>384</sup> Elastic. (2024) *Elasticsearch Guide: 8.15*. Elastic. <https://www.elastic.co/guide/en/elasticsearch/reference/current/elasticsearch-intro.html>

#### 4.8. Interviews

The interview phase drew participants from two primary sources: volunteers who expressed interest through the initial survey and those reached through direct outreach to field experts and colleagues. From the survey pool, 527 individuals initially expressed interest in participating in interviews. Of these, 60 participants scheduled an interview. Of those, 37 individuals agreed to be interviewed. Participants were offered the choice between individual interviews or small-group sessions to accommodate varying levels of comfort and facilitate dynamic discussions. Three group sessions were organized, with two groups of three participants and one group of two.

There is debate over what constitutes a sufficient number of interviews to develop a successful methodology. Often, the answer given is that it depends on the expected outcome. If the scope is extensive, numerous interviews are anticipated. Conversely, small numbers are expected if the study has a narrow scope. Based on the information presented in Wasihun Bekele and Fikire Ago's guide on interview sample sizes, the 37 interviews conducted for this study were appropriate, as the data was obtained from multiple perspectives and a variety of participants.<sup>385</sup>

In February 2021, training was completed through the Scottish Oral History Centre to ensure methodological rigor.<sup>386</sup> This two-day workshop covered essential aspects of contemporary oral history practice, including COVID-safe protocols, ethical considerations, archiving procedures, remote interviewing techniques, and equipment requirements. This formal training complemented this researcher's prior experience conducting interviews and surveys through various professional and volunteer positions.

The research employed an oral history methodology to capture participants' experiences and historical knowledge. This approach developed open-ended, non-leading questions while maintaining sufficient flexibility to explore unexpected but relevant tangents that emerged during conversations. Such flexibility proved valuable in uncovering previously unexamined aspects of genealogical research and participation in lineage societies, thereby allowing participants' experiences to inform the historical narrative in meaningful ways.

Interviews were conducted between June 2022 and January 2023, in accordance with guidelines established by the British Library Sound Archive and the Oral History Society.<sup>387</sup> While

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<sup>385</sup> Bekele, Wasihun and Ago, Fikire. (2022). Sample Size for Interview in Qualitative Research in Social Sciences: A Guide to Novice Researchers. *Research in Educational Policy and Management*, 4(1), p. 4. <https://doi.org/10.46303/repam.2022.3>: accessed 20 July 2025.

<sup>386</sup> Department of Humanities. (2021) *Scottish Oral History Centre*. University of Strathclyde. <https://www.strath.ac.uk/humanities/departmentofhumanities/history/scottishoralhistorycentre/>: accessed 8 January 2021.

<sup>387</sup> The Oral History Society and British Library jointly publish ethical and technical guidelines for oral history practice. See Oral History Society. (2021) <https://www.ohs.org.uk/>: accessed 3 March 2021.

initially mandated by COVID-19 restrictions, the decision to conduct interviews via Zoom proved advantageous, as it facilitated participation from individuals across the United States and Europe. This approach eliminated geographical barriers while maintaining the integrity of the oral history methodology.

The interview process began with preliminary contact sessions via email, during which participants received detailed information about the research project and the interview procedures. As previously stated, each participant received a “Participant Information Sheet” and “Recording Agreement/Consent Form,” with written and verbal consent obtained to ensure a complete understanding of how their contributions would be used in the research. Attention was paid to explaining confidentiality and anonymity options, allowing participants to choose their level of identification in the final study. Figure 10 presents the interview participants and their self-identified categories.

**INTERVIEW PARTICIPANT OVERVIEW**

*37 participants · coded by initials · oral history interviews, surveys, and organizational research, 2018–2022*

INITIALS	GENDER	SELF-IDENTIFIED CATEGORY	INITIALS	GENDER	SELF-IDENTIFIED CATEGORY
#	Gender	Category	#	Gender	Category
AA	Female	Lineage Society Member, Professional Genealogist	KH	Female	Professional Genealogist, Application Approver
AB	Female	Lineage Society Member	LA	Female	Lineage Society Member, Worked on Lineage Applications
AF	Male	Professional Genealogist	LC	Female	Lineage Society Member, Archivist
AK	Female	Lineage Society Member	LH	Female	Professional Genealogist
AL	Female	Lineage Society Member, Professional Genealogist	LT	Female	Lineage Society Member
AM	Male	Lineage Society Member	MC	Female	Lineage Society Member
BC	Female	Lineage Society Member	ME	Female	Lineage Society Member
BE	Female	Lineage Society Member	MK	Female	Professional Genealogist
BH	Female	Lineage Society Member	NG	Female	Lineage Society Member, Worked on Lineage Applications
BJ	Female	Lineage Society Member	NS	Female	Lineage Society Member, Worked on Lineage Applications
BR	Male	Lineage Society Member	NSW	Female	Lineage Society Member
CAC	Female	Hobby Genealogist	RC	Male	Lineage Society Member, Worked on Lineage Applications
CC	Female	Lineage Society Member	RT	Female	Lineage Society Member, Worked on Lineage Applications
DA	Female	Non-Member	SZ	Female	Lineage Society Member
DB	Female	Non-Member, Non-Genealogist	TK	Female	Lineage Society Member, Professional Genealogist
DL	Male	Lineage Society Member, Professional Genealogist	TP	Female	Lineage Society Member
ER	Female	Lineage Society Member	TR	Male	Lineage Society Member
GB	Female	Lineage Society Member, Professional Genealogist	WM	Female	Lineage Society Member
JD	Female	Lineage Society Member			

Lineage Society Member
  Professional Genealogist (incl. LS Members)
  Hobby Genealogist
  Non-Member

*n* = 37

**Figure 10:** Interview participants for the study. Initials are used for privacy reasons. Participants were asked to self-identify how they categorized their genealogy and their participation in lineage societies

The completed transcriptions were shared with participants for their review. This review provided them with the opportunity to edit any information they no longer wished to share. A three-month review period allowed interviewees to edit, clarify, or censor their transcripts as

they saw fit. In cases where participants did not return edited transcripts within this period, the original transcriptions were retained for analysis, as previously agreed upon.

Interviews were coded in the same way as the survey data discussed above. Coding the interviews enabled data analysis based on those identifiers and standardized the textual information into a format that was easier to analyze. Additionally, this process facilitated the organization and contextualization of interview information alongside the literature and survey data.

#### 4.9. Case Studies

According to social science researchers, there are four prominent approaches to case study creation, each with its own distinct perspective. These approaches are represented by Robert K. Yin, Kathleen Eisenhardt, Sharan Merriam, and Robert R. Stake and appear to be the most frequently cited in social science research. Numerous journal articles, blog posts, and websites discuss the pros and cons of each approach. After careful consideration, Yin's approach proved to be the most suitable for this study.

Yin's approach is designed to investigate contemporary phenomena in real-life contexts where the boundaries between phenomena and context are not evident, a characteristic that resonates strongly with historical research on institutional evolution, social movements, and organizational transformation over time.<sup>388</sup> His emphasis on "how" and "why" questions align with the interpretive nature of historical scholarship, moving beyond mere chronological description toward an analytical understanding of causation and processes.

Data collection through primary sources, journal articles, newspapers, surveys, and interviews is a cornerstone of robust case study design. Yin's methodology offers structured approaches to pattern matching, explanation building, and rival hypothesis testing, which are particularly valuable in historical research, where competing interpretations often emerge. His emphasis on developing theoretical propositions before data collection helps guard against the common pitfall in historical research of becoming overwhelmed by archival abundance without a clear analytical focus.

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<sup>388</sup> Yin, Robert K. (2018) *Case Study Research and Applications: Design and Methods*. 6th edn. Thousand Oaks, CA: SAGE Publications.

#### 4.9.1. Why These Two Organizations

Following Yin's principles of case study research, careful consideration was given to which societies to include in the case study. With nearly 500 heritage organizations in the United States, the organizations selected for this study were chosen based on their historical significance, membership size, documented organizational histories, and their capacity to illuminate broader patterns within the hereditary organization subculture.<sup>389</sup> From these parameters, the NSDAR and the GSMD were selected. These two organizations do not represent all hereditary societies, much less all genealogical practice. Rather, they exemplify key characteristics of the hereditary organization subculture that distinguish it from other genealogical communities: mandatory bloodline documentation, formal verification procedures, membership gatekeeping, and the deployment of patriotic rhetoric to frame exclusionary practices as national service.

Other organizations were considered but ultimately rejected for several reasons. To conduct the case study research, access to the organizational archives would need to be granted. Emails were sent to lineage societies, describing my research and requesting permission to access their archives. Two organizations, in addition to the NSDAR and GSMD, agreed to archival access. Unfortunately, the United Daughters of the Confederacy (UDC) would only allow the archivist to send scanned copies of the organization's registrar's reports and denied access to any membership data. This limitation made the case study impossible. The other, the Illegitimate Sons and Daughters of the Kings of Britain, who enthusiastically agreed to help, could not provide sufficient archival records or membership data to make a study feasible.

The NSDAR, as the best-known lineage and heritage organization in the United States, warrants study because it is the organization with which the public is most familiar. By 2019, the organization had surpassed one million cumulative members since its 1890 founding, with more than 185,000 active members across 3,000 chapters worldwide, making it the largest hereditary patriotic organization in the United States.<sup>390</sup> This familiarity means there are strong public opinions about the organization and substantial published writing about it. Due to these factors, the organization needed to be studied, as it would be unusual not to examine it, given its name recognition.

As the NSDAR is a women's organization, the choice was made to select another society with similar historical significance or ties, but that was not a women's organization, to provide

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<sup>389</sup> Hays *op. cit.* p.38.

<sup>390</sup> Daughters of the American Revolution. (2019) *DAR Surpasses One Million Members Since Its Founding*. Press Release, 5 October. <https://www.dar.org/national-society/media-center/news-releases/dar-surpasses-one-million-members-its-founding>; accessed: 5 October 2019; Wendt, Simon. (2020) *The Daughters of the American Revolution and Patriotic Memory in the Twentieth Century*. Gainesville, Florida: University Press of Florida. p.207

multiple perspectives. Children's organizations were not chosen due to their involvement with minors. The SAR and SR were excluded because of their strong affiliation with the NSDAR and the American Revolution.

The GSMD was chosen for its association with a historically significant event in United States history (the Mayflower landing and the founding of Plymouth Colony) and for its admission of both men and women. Founded in 1897 when delegates from four pre-existing state societies convened at Pilgrim Hall in Plymouth, the GSMD maintains approximately 30,000 members across 53 member societies located throughout the United States, Canada, and Europe.<sup>391</sup> The organization also has a different relationship with the public compared to the NSDAR. Thus, it provides potential opportunities for comparison and contrast between the two. Published information about the organization is limited, offering an opportunity to contribute to the existing body of knowledge.

#### 4.9.2. Organizational Remits and Activities

While hereditary organizations share fundamental characteristics, mandatory ancestral documentation, formal verification processes, and selective membership, they vary considerably in their range of activities and organizational purposes. Understanding these variations illuminates both what the case study organizations share with the broader hereditary subculture and where they diverge.

The NSDAR organizes its activities around three stated pillars: historic preservation, education, and patriotism. Educational programs include scholarship awards, citizenship preparation assistance for immigrants, and youth programs such as essay contests and Good Citizen awards. Historic preservation efforts encompass maintaining the DAR Museum and archives in Washington, D.C., marking Revolutionary War sites and graves, and supporting local historic preservation initiatives. Patriotic activities include veteran support programs, the Margaret Cochran Corbin Award, which honors distinguished servicewomen, and public commemorations of national holidays.<sup>392</sup> The organization also maintains an extensive genealogical library and publishes research resources used by members and non-members alike. This breadth of programming positions the NSDAR as simultaneously a genealogical organization, a patriotic service organization, and a women's volunteer network.

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<sup>391</sup> Wilday, Emily. (2021) *Pilgrims, Plymouth, And Public Memory: A Critical Examination of Contemporary New England Foundation Mythology*. MA Thesis, University of Hawai'i at Manoa. p.103.

<sup>392</sup> Barnes, Bart. (2004) *Lena Ferguson Dies at 75; Challenged DAR on Race*. The Washington Post. 14 March. <https://www.proquest.com>: accessed 20 April 2022 ; Wendt (2020) p.202

The GSMD focuses more narrowly on genealogical documentation and historical commemoration specifically related to the Mayflower voyage and Plymouth Colony. The organization operates the Mayflower Society House in Plymouth, Massachusetts, and, in 2019, became the sole owner of the National Pilgrim Memorial Meetinghouse, which serves as an educational center that teaches the Mayflower story to the public.<sup>393</sup> The GSMD publishes the *Mayflower Families Through Five Generations* series (known as the “Silver Books”) and the *Mayflower Quarterly*, both of which are considered authoritative genealogical resources. Unlike the NSDAR’s extensive chapter-based programming, GSMD member societies function primarily as genealogical verification bodies, with the General Society maintaining research standards and publishing lineage documentation. The organization participated prominently in Plymouth 400 commemorations marking the 400th anniversary of the Mayflower voyage, collaborating with partners in the United Kingdom, the Netherlands, and the Wampanoag Nation.<sup>394</sup>

These different organizational remits reflect distinct founding purposes and membership compositions. The NSDAR emerged from late nineteenth-century women’s club movements and explicitly sought broad patriotic programming to demonstrate women’s civic contributions.<sup>395</sup> The GSMD was developed primarily as a genealogical documentation organization, with its founding delegates focused on establishing rigorous standards for lineage verification. Both organizations, however, share core characteristics of hereditary organizations that distinguish them from non-hereditary genealogical groups: membership predicated on documented bloodline descent rather than general interest, formal application review processes, and institutional authority over lineage verification.

While both case study organizations focus on American historical events, their lineage requirements connect to European origins. The NSDAR requires documented descent from individuals who served the American Revolutionary cause between 1774 and 1783. The GSMD’s transatlantic connections are more integral to the organization’s identity, as the Mayflower passengers originated in England, with approximately 40 of the 102 passengers having lived in Leiden, the Netherlands, before embarking in September 1620.<sup>396</sup> The GSMD maintains active relationships with commemorative organizations in both the United Kingdom and the Netherlands, reflected in the collaborative Plymouth 400 programming.<sup>397</sup> These transatlantic dimensions connect the case study organizations to the broader pattern of American

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<sup>393</sup> General Society of Mayflower Descendants. (2019) ‘General Society Mayflower Descendants Becomes Sole Owner of National Pilgrim Memorial Meetinghouse’, *PR Newswire*, 23 February. <https://www.proquest.com/wire-feeds>: accessed 29 March 2024.

<sup>394</sup> Atkins, Rachel. (2019) ‘Nations come together to share plans’, *The Plymouth Evening Herald*, 3 April

<sup>395</sup> Snell *op. cit.* p.245.

<sup>396</sup> This will be discussed further in the GSMD case study chapter. However, the forty Leiden congregation members comprised approximately 39% of the 102 passengers, with the remainder consisting of crew hired by the merchant adventurers financing the voyage and other settlers with no religious affiliation to the Separatist congregation.

<sup>397</sup> Atkins *op. cit.*

genealogical interest in European origins that Jacobson identifies in the post-*Roots* ethnic revival.<sup>398</sup>

### 4.9.3. Data Collection and Sources

As Yin outlined, the research framework collected four types of information: notes, documents, tabular materials, and narratives, as seen in Figure 11.<sup>399</sup> Data management and analysis information were systematically collected and organized through several avenues. Primarily using Excel workbooks for data tracking, organizational research, and data comparison with contemporary historical writing. This process enabled the systematic collection of both quantitative and qualitative data.



**Figure 11:** Based on Robert K. Yin, *Case Study Research and Applications: Design and Methods, 6th ed.* (Thousand Oaks, CA: SAGE Publications, 2018). The research framework collected four types of information — notes, documents, tabular materials, and narratives — organized primarily through Excel workbooks for systematic data tracking, organizational research, and comparison with contemporary historical writing. This framework enabled the simultaneous collection of both quantitative and qualitative data across the 1970–2020 study period.

<sup>398</sup> Jacobson *op. cit.* p.4

<sup>399</sup> Yin *op. cit.*

Source data was gathered from multiple repositories. Information was collected from the organization's online archives, digital newspapers, and published works that covered the organization. However, trips to the NSDAR and GSMD research libraries and headquarters were made. While there, access to publications that were not available online was granted. Online collections consulted included proceedings of annual meetings, the organization's magazines, and press releases.

The NSDAR required permission from the organization's President General to access the society's private archives and other non-public data. As a member of the NSDAR, this researcher had access to the organization's annual proceedings, which were compiled during its annual conference and made available without permission. Nevertheless, a permission request was submitted to ensure that the organization's regulations, required of all researchers, were followed. If permission was not granted, some publications could have been viewed in person at the Library of Congress in Washington, D.C.

GSMD proceedings are in various locations, both online and in person. Proceedings are in the *Mayflower Quarterly* from 1935 to 1984 and are online through the American Ancestors website.<sup>400</sup> The Library of Congress in Washington, D.C., has a complete run of physical issues bound by year. Researchers at the GSMD Library in Plymouth, Massachusetts, have access to a partial physical collection and an online collection, which members of the organization can also access from home. As a member of the GSMD and American Ancestors, I conducted most of the organization's research from home, in person at the Library of Congress in Washington, D.C., and with one trip to Plymouth, Massachusetts, for on-site research.

#### 4.9.4. Representativeness and Limitations

Selecting two prominent hereditary organizations enables a deep analysis of institutional evolution but necessarily limits generalizability. The NSDAR and GSMD represent the larger, more established end of the spectrum of hereditary organizations; smaller organizations, regional societies, and ethnic-specific hereditary groups may exhibit different patterns of adaptation and exclusion. Findings from these case studies illuminate how two influential organizations within the hereditary subculture navigated the cultural transformations of 1970-2020, but conclusions should not be extended uncritically to all hereditary organizations or to the broader genealogical field.

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<sup>400</sup> American Ancestors. (2024) *Mayflower Quarterly Digital Archive*. <https://www.americanancestors.org>: 15 January 2024.

The case studies also focus specifically on national-level organizational policies and publications. As documented in the survey findings, chapter-level practices sometimes diverge significantly from national policies, suggesting that the formal institutional evolution traced through archival sources captures only part of the membership experience. The interview data address this limitation by incorporating individual members' accounts of local practice, but a comprehensive analysis of chapter-level variation exceeds the scope of this study.

#### 4.10. Conclusion

This methodology chapter establishes the foundation for analyzing how evolving social perceptions of heritage and ancestral identity influenced genealogical practices and institutional responses during a period of significant cultural change. The comprehensive research design, incorporating both quantitative and qualitative approaches, enables the examination of multiple dimensions of this cultural shift. The ethical framework and bias recognition strategies ensure the reliability of the findings while acknowledging the inherent limitations of historical research.

The methodological framework addresses a bounded research problem: understanding how two prominent hereditary organizations navigated the cultural transformations of 1970-2020. As established in the opening sections, hereditary organizations constitute one subculture within a diverse genealogical landscape that includes African American, Jewish, Mormon, ethnic diaspora, Indigenous, and regional genealogical communities.<sup>401</sup> The NSDAR and GSMD case studies, combined with survey and interview data drawn predominantly from individuals affiliated with the hereditary organization subculture, illuminate patterns of institutional adaptation and individual experience within this community. Findings should be understood as contributing to knowledge about hereditary organizations specifically, rather than genealogical practice universally. The mixed-methods approach enables triangulation across institutional policies, individual experiences, and organizational evolution, providing multiple perspectives on how the hereditary subculture responded to pressures for inclusion while maintaining membership structures predicated on documented bloodline descent.<sup>402</sup>

Having established the methodological framework, the following chapter examines the survey and interview findings. The analysis examines how shifting demographics and motivations reflect broader social trends in genealogical research and in participation in lineage societies.

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<sup>401</sup> See Section 4.1; Morgan (2021) *op. cit.* pp.3-4; Jacobson *op. cit.*

<sup>402</sup> See Section 4.2; Teachout, Woden Sorrow. (2003) *Forging Memory: Hereditary Societies, Patriotism and the American Past, 1876-1898*. PhD Dissertation, Harvard University. p.128.

Attention is given to how participants understood and navigated the barriers to participation documented in the survey, and how their experiences illuminate the gap between formal institutional policies and lived organizational culture.

## Chapter 5 The Changing Face of Family

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This chapter presents a demographic analysis that reveals patterns in community composition, generational influences, and evolving trends in participation. It examines demographic shifts since the Fullerton Genealogical Study of 2001, revealing changes in gender distribution, income levels, and age demographics that reflect broader societal changes and the field's evolution.

The demographic patterns examined here must be understood within the context established in previous chapters: hereditary organizations constitute one bounded subculture among many within the broader American genealogical ecosystem.<sup>403</sup> The term “subculture” warrants definition at the outset, because it carries specific analytical meaning throughout this thesis. Hereditary organizations share the defining features of a sociological subculture: a distinguishable group within a larger culture whose members maintain specific membership rituals, documentary standards, institutional hierarchies, and shared vocabularies that set them apart from other genealogical practitioners, even as those members simultaneously participate in the broader genealogical community.<sup>404</sup> A member of the DAR, for example, may also belong to a regional genealogical society, subscribe to Ancestry.com, volunteer at a local archive, and participate in DNA-based genealogical research groups. Yet her experience within the DAR is governed by institutional norms, evidentiary requirements, and social dynamics that differ substantially from those she encounters in other genealogical contexts. Understanding these distinctions is essential for interpreting the demographic data that follows.

As previously discussed, genealogical practice since 1970 has diversified substantially across African American, Jewish, Mormon, ethnic diaspora, Indigenous, and regional communities, each operating with distinctive evidentiary standards, institutional structures, and demographic compositions not captured in this study's sample.<sup>405</sup> The nature of this study's sample introduces representational considerations that must be carefully addressed when interpreting

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<sup>403</sup>See Chapter 1, Section 1.5, “Hereditary Organizations as One Genealogical Subculture,” and Chapter 4, Section 4.1, for the full analytical framework positioning hereditary organizations within the broader genealogical landscape.

<sup>404</sup>The term “subculture” is used throughout this thesis in its sociological sense: a distinguishable group within a larger culture whose members share distinctive practices, values, and norms while remaining connected to the broader culture. Hereditary organizations qualify as a subculture because they maintain specific membership rituals, documentary standards, institutional hierarchies, and shared vocabularies that distinguish their members from other genealogical practitioners, even as those members simultaneously participate in the broader genealogical community. For the application of subculture theory to voluntary associations, see Fine, Gary Alan and Kleinman, Sherry. (1979) Rethinking Subculture: An Interactionist Analysis. *American Journal of Sociology*. 85(1). pp. 1–20.

<sup>405</sup>For the detailed treatment of these diverse genealogical communities, see Chapter 1, Section 1.5; Chapter 3, Section 3.7.2. Key scholarship on these distinct subcultures includes Nelson *op. cit*; Creet *op. cit*; Akenson *op. cit*; Jacobson *op. cit*; Hjorthén *op. cit*.

findings. As participants chose to answer the survey and share it with others in their social sphere, those who participated were primarily reached through networks centered on hereditary organizations and their associated genealogical communities. This methodological approach means that the ethnic underrepresentation documented in this chapter reflects the survey's reach within the hereditary organization subculture rather than the broader genealogical community's composition.<sup>406</sup> Geographic constraints may also affect the generalizability of results to broader populations or diverse cultural contexts. While these limitations must be acknowledged, they do not diminish the significance of the patterns and relationships revealed within the hereditary organization subculture that constitutes the focus of this study. Where existing scholarship provides demographic information about other genealogical communities, this chapter draws on those findings to contextualize the patterns observed here, though systematic comparison across subcultures falls outside the scope of this investigation.

Understanding who participates in genealogical research and how that participation has evolved provides context for examining the institutional developments within the field. The historical significance of genealogical research and lineage societies extends beyond their value to individual researchers seeking family history connections. As Rhoads observed, family stories, often retold across generations, are particularly susceptible to elaboration. Families seek to preserve positive narratives while removing information that they prefer their descendants not to know.<sup>407</sup> These stories can also overlook the broader social, political, and economic realities and pressures that shape people's lives beyond the direct influences of parents and home environment.

### 5.1. Tracking Genealogy's Contemporary Evolution

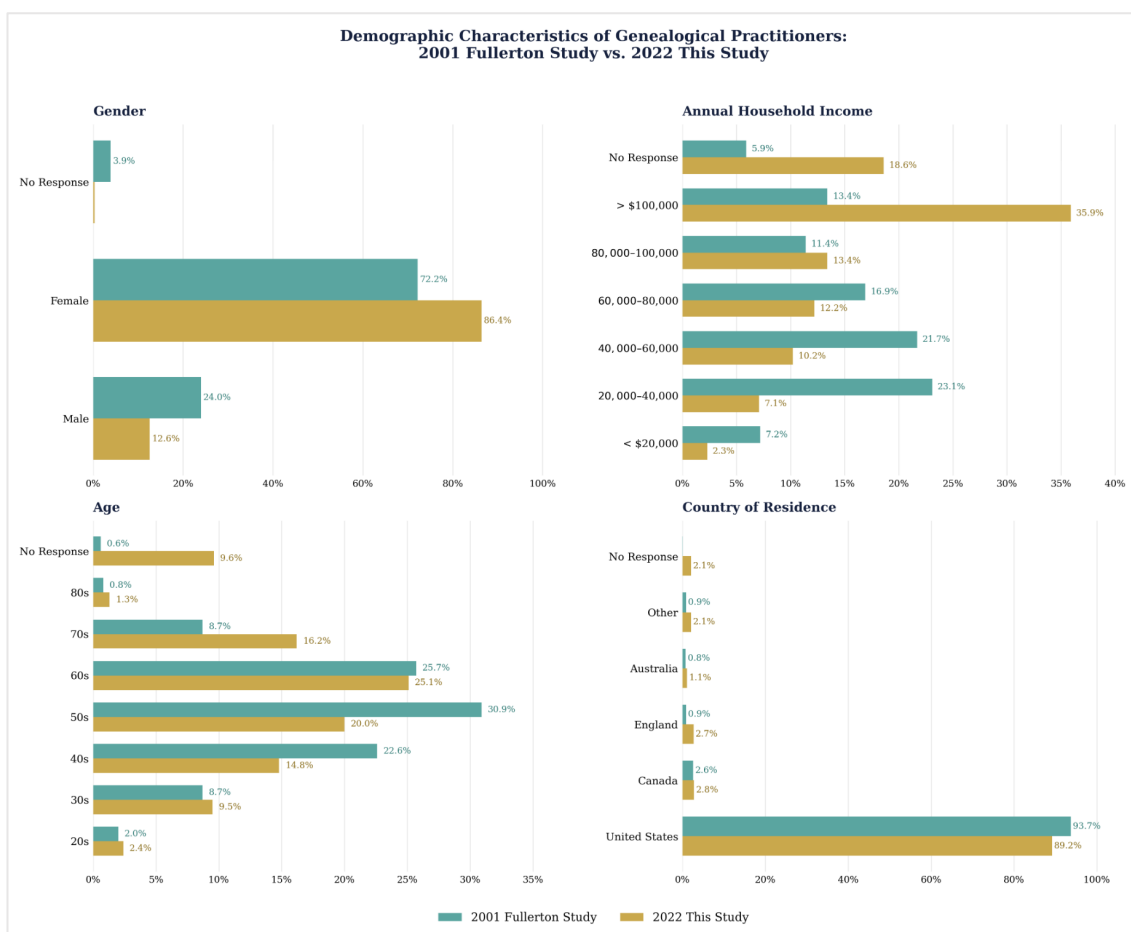
This section examines transformations through a comparative analysis of two significant studies: Pamela J. Drake's 2001 Fullerton Genealogy Study, which surveyed 4,109 genealogists and established crucial baseline data about the field's practitioners, and this study's 2022 survey.<sup>408</sup> The comparison of which is discussed below and shown in Figure 12. It reveals how the genealogical community within and around the hereditary organization subculture has evolved over two decades.

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<sup>406</sup> Survey methodology limitations, including sampling approach and completion rates, are discussed fully in Chapter 4, Section 4.8.

<sup>407</sup> Rhoads, James B. (1979) The Importance of Family History to Our Society. *The Public Historian*. Spring. 1(3). p. 11. <https://www.jstor.org/stable/3377529>; accessed 14 August 2024.

<sup>408</sup> Drake, Pamela J. (2001) *Findings From the Fullerton Genealogy Study: A Master's Thesis Project*. MS thesis, California State University, Fullerton. <http://psych.fullerton.edu/genealogy/>; accessed 1 February 2021. Drake's study surveyed a broad cross-section of genealogists recruited through online genealogical communities, not exclusively through hereditary organizations. Consequently, the 2001 baseline reflects a wider genealogical population than this study's 2022 sample, which was distributed primarily through hereditary organization networks. Differences between the two studies may therefore reflect both genuine demographic change and differences in sampling reach.



**Figure 12:** Demographic characteristics of genealogical practitioners: 2001 Fullerton Study compared with this study (2022). Paired horizontal bars show the percentage of respondents in each category for 2001 (light) and 2022 (dark). The most significant shifts across the two decades are the increase in female participation (72.2% to 86.4%), the near-tripling of respondents in the highest income bracket (>\$100,000: 13.4% to 35.9%), the decline in practitioners in their 40s (22.6% to 14.8%) and 50s (30.9% to 20.0%), and the near-doubling of participation among those in their 70s (8.7% to 16.2%). Non-binary participants (0.6%) were not recorded in the 2001 study. Country of residence figures show that participants outside the United States remain a small but slightly growing proportion of respondents.

The analysis identifies three distinct generational groups, each shaped by the technological and cultural contexts in which they entered genealogical research. As TR observed, “I think that genealogy is at an interesting turning point now with technology, DNA ... where it has real implications for people.”<sup>409</sup> TR’s observation captures the dual nature of this turning point: technology simultaneously expands access to genealogical resources while creating new forms of methodological stratification between practitioners who can navigate sophisticated digital tools and those who cannot. This tension between technological democratization and practical accessibility recurs throughout the survey data, as subsequent sections demonstrate.

<sup>409</sup>TR. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

### 5.1.1. What Fullerton Taught Us About Genealogists

Drake conducted the Fullerton Genealogy Study in 2001 as part of her master's degree at California State University, Fullerton.<sup>410</sup> The study aimed to understand genealogists and the motivations behind their pursuit of family history. She collected 4,109 responses, primarily through online genealogical communities, shown in. Participants were predominantly female (72.2%), with an average age of fifty-four, and most were married (78.6%) with children (85.7%).

The Fullerton study showed that participants typically began their genealogical research around age 40, with experience levels ranging from newcomers to those with 65 years of research experience. The average participant had been conducting family history research for 14 years, indicating that they began around 1986. Drake's research demonstrated a strong preference for online engagement: 61.2% belonged to five or more online genealogy groups, compared with 14.2% who participated in five or more in-person groups. However, 90% had traveled at least once in the previous five years to conduct family research.<sup>411</sup>

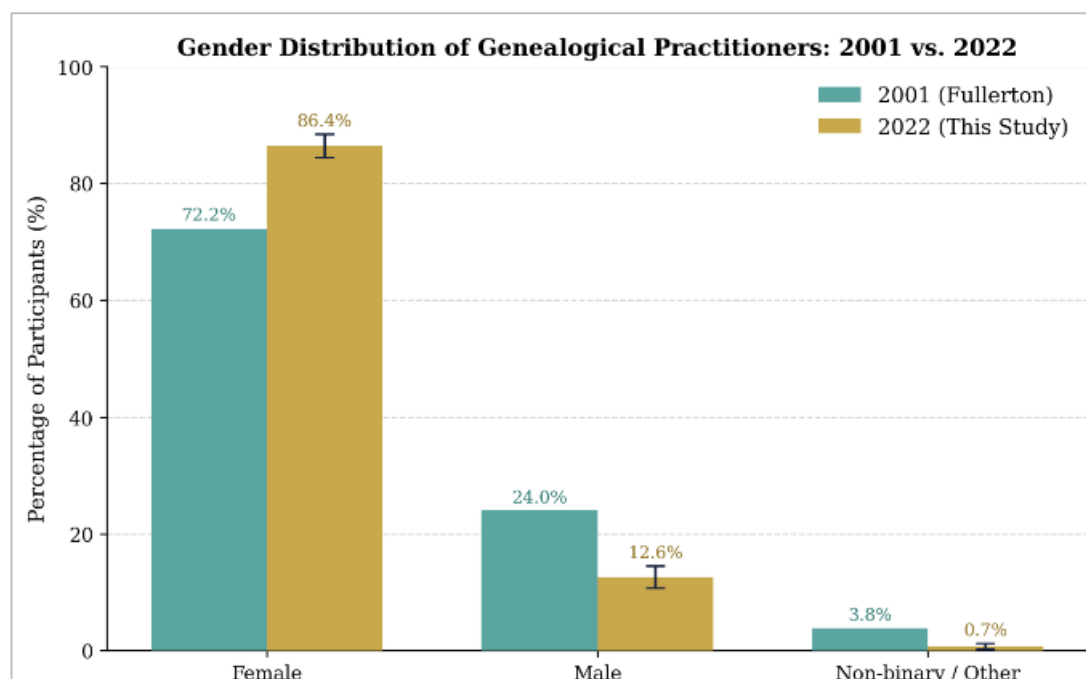
### 5.1.2. Shifts in Community Composition

The comparison between the 2001 Fullerton study and this study's data reveals fundamental shifts in field participation and research methodologies. The most striking transformation is evident in the gender distribution, with female participants now constituting 86.4% of practitioners (95% CI: [84.4%, 88.4%]), compared with 72.2% in 2001. Male participants accounted for 12.6% (95% CI: [10.7%, 14.5%]), a decrease from 24.0% in 2001, while non-binary participants accounted for 0.7% (95% CI: [0.2%, 1.2%]). This increasing gender asymmetry underscores the need to carefully consider barriers to broader demographic participation (Figure 13).

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<sup>410</sup>Drake (2001) *op. cit.* Drake's study recruited participants primarily through online genealogical communities during a period when internet-based genealogical groups were still establishing themselves. Her sample of 4,109 respondents thus represents genealogists who were already engaged with online communities in 2001, a factor that may have skewed her sample toward more technologically engaged practitioners compared to the broader genealogical population at that time.

<sup>411</sup>Drake (2001) *op. cit.*

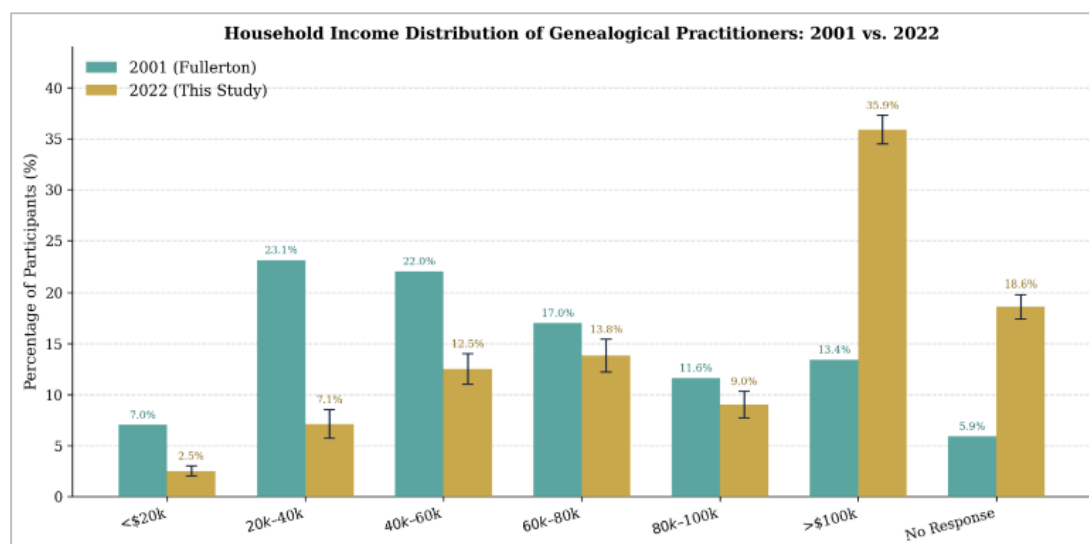


**Figure 13:** Gender Distribution of Genealogical Practitioners: 2001 vs. 2022 Comparison of gender distribution between the 2001 Fullerton study and the 2022 survey conducted for this study ( $n = 1,057+$ ). Error bars represent 95% confidence intervals for 2022 data. Female participation increased from 72.2% to 86.4% (95% CI: 84.4%–88.4%), while male participation decreased from 24.0% to 12.6% (95% CI: 10.7%–14.5%). Non-binary participants constituted 0.7% (95% CI: 0.2%–1.2%) of the 2022 sample; this category was not reported in the 2001 study

Income demographics reveal the most significant transformation in community composition (Figure 14). The proportion of participants earning more than \$100,000 increased from 13.4% in 2001 to 35.9% (CI: 33.19%–38.71%) in 2022, with non-overlapping confidence intervals indicating that this change was statistically significant.<sup>412</sup> Conversely, there was a notable decrease in representation from lower- to middle-income groups, with the \$20,000–\$40,000 bracket decreasing from 23.1% to 7.1% (CI: 5.81%–8.64%). The “No Response” rate increased significantly from 5.9% to 18.6% (CI: 16.47%–20.93%), indicating a change in response patterns that may reflect increased privacy awareness or variations in the sampling methodology. This economic stratification aligns with patterns Cortada identified across multiple American information-intensive hobbies, where participation in activities such as coin collecting, stamp collecting, and gardening showed similar income concentration during the same period, suggesting that the wealth skew documented here reflects broader trends in American leisure participation rather than dynamics unique to the genealogical subculture.<sup>413</sup>

<sup>412</sup>These income figures require contextualization for meaningful comparison across the two-decade span. The 2001 Fullerton study reported household incomes without inflation adjustment; applying the Bureau of Labor Statistics Consumer Price Index, \$100,000 in 2001 dollars represents approximately \$169,000 in 2022 purchasing power. Consequently, the apparent increase in higher-income participants partly reflects inflationary effects rather than a purely compositional shift, though the magnitude of change (from 13.4% to 35.9%) exceeds what inflation alone would explain.

<sup>413</sup> Cortada *op. cit.* p. 160. Cortada documents how American hobbies requiring information-intensive engagement, including genealogy, coin collecting, stamp collecting, and gardening, showed similar patterns of economic stratification during



**Figure 14:** Household Income Distribution of Genealogical Practitioners: 2001 vs. 2022 Comparison of household income brackets between the 2001 Fullerton study and the 2022 survey. Error bars represent 95% confidence intervals for 2022 data. The most significant shift is the increase in participants earning more than \$100,000, rising from 13.4% to 35.9% (95% CI: 33.2%–38.7%), with non-overlapping confidence intervals confirming statistical significance. Income figures are not inflation-adjusted; \$100,000 in 2001 dollars equates to approximately \$169,000 in 2022 purchasing power.

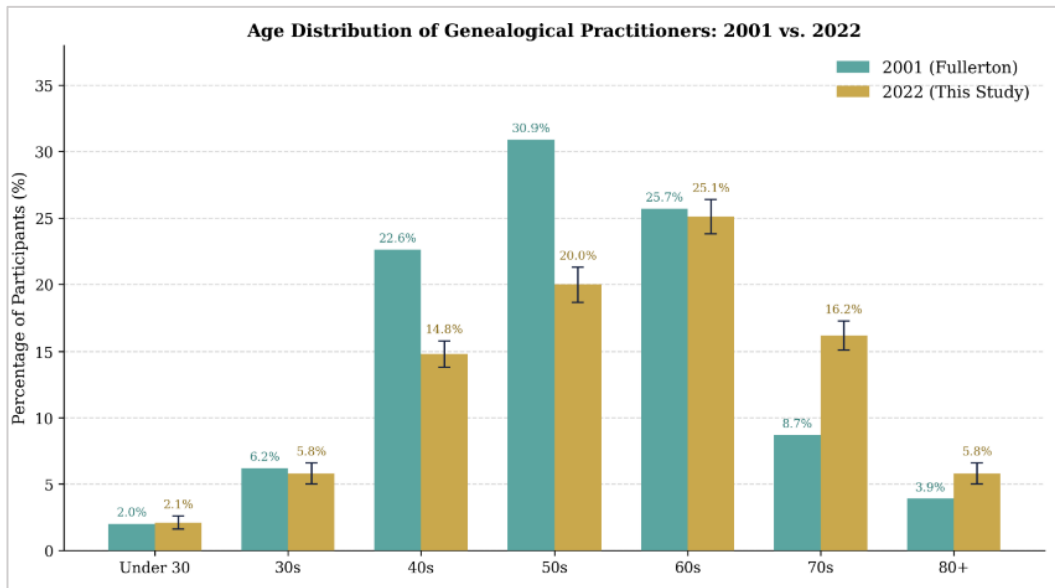
Age distribution patterns (Figure 15) reveal complex generational transitions within the genealogical community. The most notable changes occurred in the middle age ranges, with the 40s age group decreasing significantly from 22.6% (CI: 21.35%–23.91%) to 14.8% (CI: 12.89%–16.93%), and the 50s age group decreasing from 30.9% (CI: 29.49%–32.35%) to 20.0% (CI: 17.81%–22.37%). However, there was a substantial increase in the 70s age group, nearly doubling from 8.7% (CI: 7.89%–9.59%) to 16.2% (CI: 14.20%–18.41%). The 60s age group remained stable at 25.1% (CI: 22.69%–27.67%) compared with 25.7% (CI: 24.38%–27.07%) in 2001. The non-overlapping confidence intervals for the 40s and 50s age groups confirm these changes are statistically significant.

Comparing the survey data with U.S. Census Bureau data reveals an opposite trend in the general population.<sup>414</sup> When comparing Census data from 2000 and 2020 (Figure 16) with the age breakdown data from the survey, those who participate in genealogy represent the largest proportions in the middle age ranges, after which participation decreases as the population declines. Although the general population remains statistically stable until approximately age 55, a distinct bell curve of genealogical interest is evident among the survey participants,

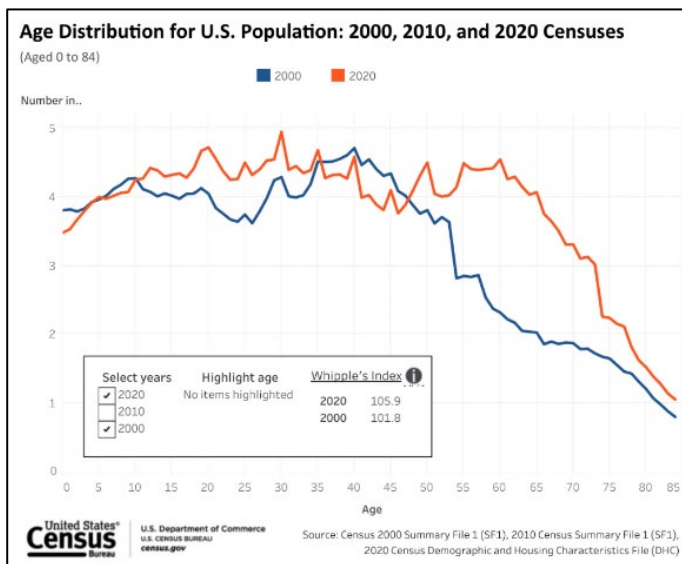
the late twentieth and early twenty-first centuries, suggesting that the income concentration documented in the hereditary organization subculture reflects broader trends in American leisure participation rather than dynamics unique to genealogy.

<sup>414</sup> Jensen, Eric; Roberts, Andrew; Rogers, Luke. (2023) *Age Heaping in the 2020 Census Demographic and Housing Characteristic File (DHC)*. United States Census Bureau. <https://www.census.gov/newsroom/blogs/random-samplings/2023/05/age-heaping-2020-census-dhc.html>: accessed 21 July 2025.

lending credence to the persistent characterization of genealogical practitioners as predominantly middle-aged.<sup>415</sup>



**Figure 15:** Age Distribution of Genealogical Practitioners: 2001 vs. 2022 Comparison of age cohort distribution between the 2001 Fullerton study and the 2022 survey. Error bars represent 95% confidence intervals for 2022 data. Statistically significant declines occurred in the 40s cohort (22.6% to 14.8%; 95% CI: 12.9%–16.9%) and the 50s cohort (30.9% to 20.0%; 95% CI: 17.8%–22.4%), while the 70s cohort nearly doubled from 8.7% to 16.2% (95% CI: 14.2%–18.4%). The 60s cohort remained stable across both study periods.



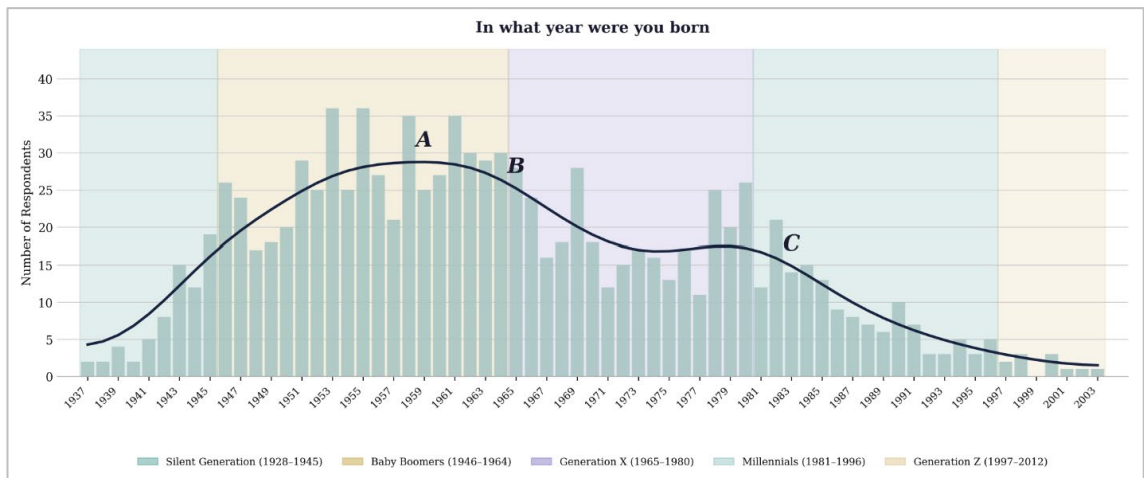
**Figure 16:** Population by age for the United States in 2000 and 2020. Jensen, Eric; Roberts, Andrew; Rogers, Luke. (2023) *Age Heaping in the 2020 Census Demographic and Housing Characteristic File (DHC)*. United States Census Bureau

<sup>415</sup>This characterization applies specifically to the hereditary organization subculture surveyed in this study; age distributions may differ among other genealogical communities. Drake’s 2001 findings showed a similar pattern, with the average participant age of fifty-four suggesting that middle-age entry into genealogical research is a long-standing pattern rather than a recent development. However, anecdotal evidence from other subcultures suggests different age profiles: Mormon genealogical engagement frequently begins in young adulthood as a religious obligation, and African American genealogical societies report drawing younger members motivated by the cultural significance of reclaiming family histories disrupted by slavery. See Akenson, Donald Harman. (2007) *Some Family: The Mormons and How Humanity Keeps Track of Itself*. Montreal: McGill-Queen’s University Press. pp. 69–70.

The increase in the “No Response” rate for age (from 0.6% to 9.6%) may indicate changes in data-collection methods or response patterns, as well as increased public awareness of data privacy, which could make participants more hesitant to share personal information they perceive as sensitive.<sup>416</sup> The fact that the income non-response rate (18.6%) exceeds the age non-response rate (9.6%) supports this interpretation.

### 5.1.3. Three Generations, Three Approaches

Three distinct generational groups were identified (Figure 17) whose characteristics reveal transitions in genealogical practice. The primary cohort, comprising participants born between 1953 and 1964, exhibits distinct characteristics shaped by their entry into genealogical research following the publication of Alex Haley’s *Roots*. These participants, representing 38.2% of surveyed researchers, began their research using traditional documentary methods and later adapted to digital resources, with current research patterns showing integration of traditional and contemporary methodologies: 86.4% maintaining traditional documentary research practices while selectively incorporating digital tools (72.3%) and DNA evidence (58.6%).



**Figure 17:** Birth years of survey participants ( $n = 1,052$ ), grouped by generational cohort. Analysis of birth year data reveals three distinct peaks in participation: cohort A (born 1953–1964), representing the largest group of participants (38.2%), whose entry into genealogical research coincided with the publication of Alex Haley’s *Roots*; cohort B (born 1978–1982), who came of age during the emergence of digital resources; and cohort C (born 1985–1995), digital natives whose participation was absent from the 2001 Fullerton study. The smoothed trend line illustrates the distribution across all five generational cohorts. 112 respondents did not provide a birth year and are excluded from this figure.

<sup>416</sup> Kibuacha, Frankline. (2023) *Explainer: Understanding Nonresponse Bias in Research and How to Mitigate it*. GeoPoll. 15 September. <https://www.geopoll.com/blog/explainer-understanding-nonresponse-bias-in-research-and-how-to-mitigate-it/>: accessed 21 July 2025.

This primary cohort's methodological trajectory, from courthouse ledgers and microfilm to online databases and DNA kits, encapsulates the broader transformation in American genealogical practice during the study period. Their continued commitment to traditional documentary methods, even as they adopt digital tools, reflects the evidentiary standards emphasized by hereditary organizations whose verification processes remained grounded in paper documentation throughout most of the study period.<sup>417</sup> For readers unfamiliar with hereditary organization application processes, this commitment to paper documentation is not merely a preference but an institutional requirement: organizations such as the NSDAR and GSMD require applicants to submit photocopies or certified copies of primary source documents (birth certificates, marriage records, military service records, wills, and similar materials) for each generational link in their claimed lineage. Digital indexed records, including those from commercial databases, are not uniformly accepted as standalone evidence, creating a research environment in which physical access to archives and courthouses remains essential even in the digital age.

The secondary cohort (born 1978–1982) entered during the emergence of digital resources, a timing that illuminates the significant impact of cultural and technological developments. These individuals came of age during a transformative period in information access and processing, witnessing and participating in the digital revolution while maintaining connections to pre-digital research methods. Unlike the primary cohort, who experienced digitization as an addition to established practices, the secondary cohort encountered digital and traditional methods as contemporaneous options from the outset of their research careers. This positioning gave them fluency in both approaches without the primary cohort's strong attachment to pre-digital methodologies as foundational practice.

Yet this technological transition, while celebrated by many practitioners as fundamentally liberating in removing the physical barriers that once defined genealogical work, introduced new obstacles that qualified the democratization narrative. Subscription costs for major databases, technical literacy requirements, and the assumption of reliable internet access effectively excluded rural and lower-income practitioners from the same resources that urban, affluent researchers could readily access. The economic stratification documented in Section 5.1.2 suggests these digital access barriers reinforced rather than disrupted existing patterns of participation.

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<sup>417</sup>See Chapters 8 and 9 for detailed examination of NSDAR and GSMD documentary verification processes and their evolution during the study period. "Documentary verification" in the hereditary organization context refers to the process by which applicants must submit genealogical evidence—birth, marriage, death, and military service records, typically in the form of certified copies or authenticated reproductions—demonstrating an unbroken line of descent from a qualifying ancestor. Each generation in the lineage must be supported by at least one primary or secondary source document. This process is administered by volunteer genealogists within each organization who review applications against the organization's specific documentary standards.

Most notably, the 2022 data showed the emergence of a third cohort representing digital natives in genealogical research: practitioners born between 1985 and 1995. This group, absent from the 2001 Fullerton study, demonstrates how technological evolution has created new pathways into genealogical research, having grown up with the internet, social media, and sophisticated search technologies as natural parts of their daily lives. During interview sessions, ME discussed the perspectives of this generation: “Yes. You know, especially Gen-Zeers, they don’t know a world where things were censored. They know, like, just from the internet ... I can get on Reddit and pretty much say whatever I want. And that’s cool. And so, I feel like we need that. We need that generation to come in, and ... push the narrative.”<sup>418</sup>

ME’s observation highlights a generational divide that extends beyond technological comfort to fundamentally different expectations about information access and institutional authority. This cohort’s assumption that genealogical information should be freely accessible and openly debated challenges the documentary gatekeeping that has characterized traditional hereditary organizations. Their willingness to “push the narrative” suggests potential disruption to verification systems predicated on institutional authority rather than open discourse. A tension that subsequent chapters explore through the case studies of specific organizations. Whether this generational shift will produce substantive change in hereditary organization practices or whether institutional structures will absorb these challenges without fundamental transformation remains an open question that the NSDAR and GSMD case studies address in Chapters 8 and 9.

## **5.2. The Modern Practitioner**

The demographic shifts documented in the preceding section establish that the genealogical community within the hereditary organization subculture has changed substantially since 2001. This section examines three dimensions of contemporary practitioner characteristics of education, economic status, and ethnic composition that shape both individual research capabilities and institutional engagement patterns within this bounded community.

### **5.2.1. Education’s Role in Engagement**

Educational attainment among surveyed practitioners significantly exceeds the national average: 78.9% hold advanced degrees, compared with approximately 14% of the general U.S. population.<sup>419</sup> This concentration of educational capital suggests that the hereditary organization

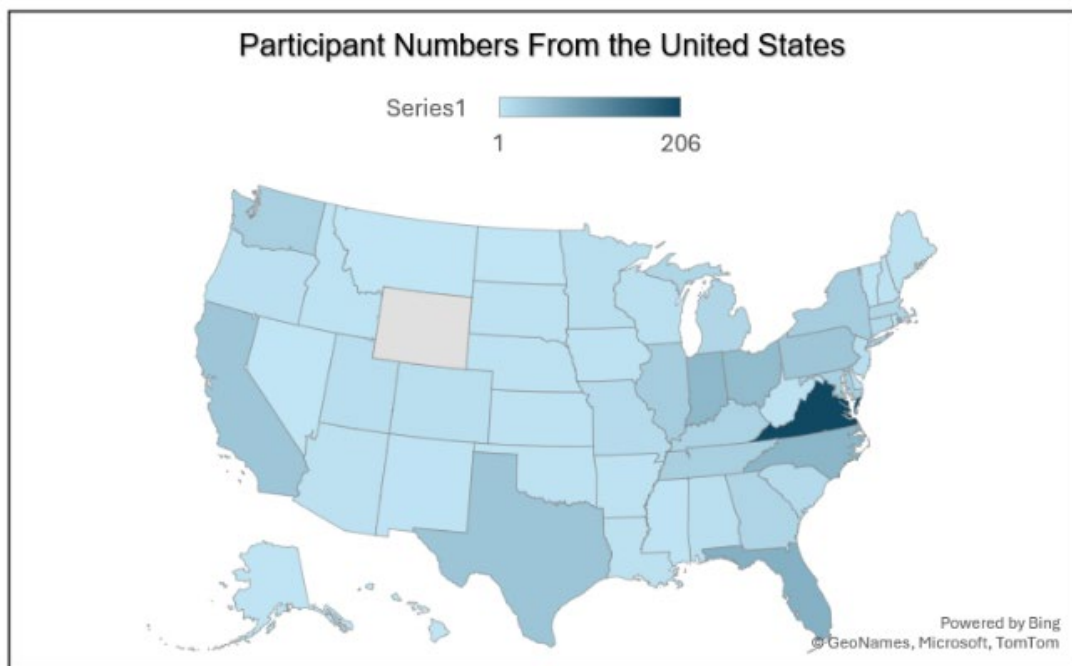
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<sup>418</sup>ME. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>419</sup>United States Census Bureau. (2023) *Educational Attainment in the United States: 2022*. Current Population Survey Annual Social and Economic Supplement. <https://www.census.gov/data/tables/2022/demo/educational-attainment/cps-detailed-tables.html>: accessed 21 July 2025. The Census Bureau figure of approximately 14% refers to the proportion of

subculture attracts individuals with substantial research training and analytical capabilities, though it also raises questions about accessibility for those without advanced educational backgrounds. The educational profile of practitioners within this subculture may also reflect the specific demands of genealogy and hereditary organization membership: successfully navigating the application process requires skills in archival research, document analysis, and evidentiary argumentation that formal education cultivates, even when the education itself is in an unrelated field. A practitioner with a graduate degree in engineering, for instance, brings transferable analytical competencies to genealogical research that may facilitate engagement with the documentary requirements of lineage verification.

The geographic distribution of survey participants reveals concentrations that reflect both the researcher's professional networks and broader patterns of genealogical engagement, demonstrated in Figure 18. Virginia's high response rate aligns with the researcher's professional connections through lectures and organizational work in the region, while Florida's strong representation aligns with the state's large, retired population. As De Groot observed, retirement frequently catalyzes genealogical engagement through what he characterized as post-retirement ennui, where individuals seek meaningful intellectual pursuits after leaving the workforce.<sup>420</sup>



**Figure 18:** Geographic distribution of survey participants across the United States ( $n = 1,052$ ). Virginia recorded the highest response rate ( $n = 206$ ), reflecting the researcher's professional networks through lectures and organizational work in the region. Wyoming was the only state to return no responses. Color

Americans aged 25 and older holding a graduate or professional degree. This study categorizes "advanced degrees" as any educational attainment beyond a bachelor's degree, including master's, doctoral, and professional degrees (such as JD, MD, or equivalent).

<sup>420</sup>De Groot, Jerome. (2015) On Genealogy. *The Public Historian*. November. 37(3). pp. 105–106. <https://doi.org/10.1525/tph.2015.37.3.102>; accessed 10 March 2024.

*intensity indicates the number of participants per state, ranging from 1 to 206. Alaska and Hawaii are shown at reduced scale.*

### **5.2.2. Economic Gatekeeping**

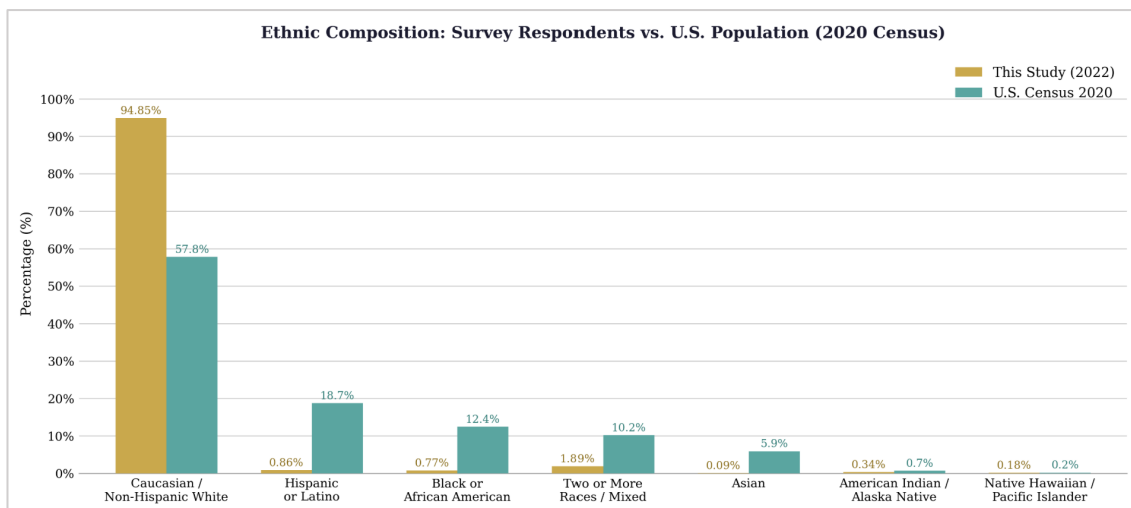
The income shifts introduced in Section 5.1.2 carry implications beyond demographic description. The substantial increase in practitioners from higher-income brackets, with those earning over \$100,000 annually rising from 13.4% in 2001 to 35.9% in 2022, was accompanied by a significant decline in participation among middle-income practitioners, patterns whose consequences for organizational participation are examined in detail in Section 5.4. The geographic distribution of practitioners intersects with these economic patterns: rural participants reported higher financial barriers to organizational involvement (9.2%) compared with urban (6.1%) and suburban (5.0%) participants, suggesting that geographic location amplifies economic constraints. These disparities reflect both income differentials across geographic settings and the additional costs associated with accessing organizational resources concentrated in urban centers, including travel to archives, attendance at meetings, and participation in conferences.

These economic patterns within the hereditary organization subculture become analytically more significant when placed alongside what is known about economic access in other genealogical communities. The FamilySearch platform provides free access to the world's largest genealogical database, effectively eliminating the subscription costs that represent a significant financial barrier for practitioners who rely on paid services like Ancestry.com. Regional genealogical societies typically operate with minimal membership fees, often under twenty dollars annually, compared with the combined application and dues costs of hereditary organizations. These comparisons suggest that the economic stratification documented in this study reflects, at least in part, the specific cost structure of the hereditary organization subculture rather than an inherent feature of genealogical practice.

### **5.2.3. Ethnic Composition and Representation**

The survey's ethnic composition (Figure 19) reflects the specific characteristics of the hereditary organization subculture rather than the broader genealogical landscape. Caucasian non-Hispanic participants constitute 94.85% of respondents, a concentration that contrasts with the 2020 U.S. Census, which documented 57.8% of the population as non-Hispanic white, 18.7% Hispanic or Latino, 12.4% Black or African American, and 10.2% identifying as two or

more races.<sup>421</sup> This disparity warrants careful interpretation: it reflects the historical origins, membership structures, and social networks of the hereditary organizations through which the survey was primarily distributed, not the demographics of American genealogical practice as a whole.



**Figure 19:** Ethnic composition of survey respondents compared with the U.S. population (2020 Census). Caucasian non-Hispanic participants constitute 94.85% (95% CI: 93.58%–96.12%) of survey respondents, compared with 57.8% of the U.S. population as recorded in the 2020 Census — a gap of 37.1 percentage points. All other ethnic groups are substantially underrepresented relative to their share of the national population, most notably Hispanic or Latino respondents (0.86% in the survey vs. 18.7% in the Census) and Black or African American respondents (0.77% in the survey vs. 12.4% in the Census). This disparity reflects the historical origins, membership structures, and social networks of the hereditary organizations through which the survey was primarily distributed, not the ethnic composition of American genealogical practice as a whole. Census data sourced from the United States Census Bureau (2021).

As established in Chapter 3 (Section 3.7.2), genealogical engagement extends across diverse communities through organizations with fundamentally different structures and purposes than the hereditary societies that form the focus of this study. James Dent Walker’s observation that African Americans “usually couldn’t do anything further back than 1870... before the Civil War” because of the deliberate destruction and exclusion of enslaved people from official records illustrates how documentary privilege, the unequal availability of genealogical records based on one’s ancestors’ social position, creates structural barriers to participation in organizations that require documented lineage.<sup>422</sup> This documentary privilege does not affect all

<sup>421</sup>United States Census Bureau. (2021) *2020 Census Illuminates Racial and Ethnic Composition of the Country*. 12 August. <https://www.census.gov/library/stories/2021/08/improved-race-ethnicity-measures-reveal-united-states-population-much-more-multiracial.html>: accessed 15 September 2025.

<sup>422</sup>Walker, James Dent. (1985) Interviewed by Ross, Rodney A. *Oral History Interview*. 27 March. National Archives and Records Administration. “Documentary privilege” as used throughout this thesis refers to the unequal availability of genealogical records based on one’s ancestors’ social position. Ancestors who were wealthy, literate, landowning, or otherwise socially prominent generated extensive paper trails—wills, deeds, tax records, church registers, military commissions—that their descendants can now use to document lineage. Ancestors who were enslaved, impoverished, illiterate, or socially marginalized were systematically excluded from the documentary record or appeared in it only as property,

genealogical subcultures equally: organizations such as the Afro-American Historical and Genealogical Society (AAHGS, founded 1977) developed alternative methodological approaches precisely because the documentary standards of hereditary organizations presupposed record availability that did not exist for many Americans.<sup>423</sup>

The ethnic concentration within the survey sample thus reflects not a lack of genealogical interest among non-white Americans but rather the specific institutional context through which participants were reached. The hereditary organizations examined in this study were overwhelmingly founded by and for Americans of European descent in the late nineteenth century, and their membership demographics continue to reflect those origins. Whether and how these organizations have worked to address historical exclusion is examined in the case study chapters, where evidence of contemporary organizational efforts toward inclusion can be evaluated alongside the structural barriers that persist. The evidence presented in those chapters demonstrates that contemporary organizations have undertaken significant initiatives, including the NSDAR's publication of *Forgotten Patriots* documenting minority Revolutionary service, the development of specialized research guidance for populations facing distinctive documentary challenges, and active efforts to recruit more diverse membership, while the structural limitations inherent to bloodline-based membership criteria remain unresolved.

### 5.3. Modern Life and Traditional Knowledge Transfer

The generational cohorts and economic stratification documented in the preceding sections raise a question that the survey data can begin to answer: how have changing family structures, workforce participation patterns, and geographic mobility affected the transmission of genealogical knowledge and engagement with hereditary organizations? The evidence presented here suggests that traditional intergenerational knowledge transfer, the passing of family stories, documents, and organizational membership from one generation to the next, has been disrupted by the same social forces that reshaped American civic life more broadly during the study period.

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unnamed dependents, or statistical entries. This disparity means that the ability to document lineage for hereditary organization membership correlates with ancestral social status, creating a contemporary barrier rooted in historical inequality rather than in any deficiency of the applicant's research skills or commitment.

<sup>423</sup>The Afro-American Historical and Genealogical Society (AAHGS), founded in 1977 in Washington, D.C., specifically addressed the methodological challenges faced by African American researchers. AAHGS developed expertise in working with Freedmen's Bureau records, slave schedules, plantation records, and other alternative sources that fall outside the standard documentary framework used by hereditary organizations. Similarly, JewishGen (launched 1987) developed specialized methodologies for navigating Holocaust-era record destruction and diaspora research challenges. These organizations represent distinct genealogical subcultures with their own institutional structures, evidentiary standards, and demographic compositions. See AAHGS. (n.d.) About AAHGS. *African American Historical and Genealogical Society*. <https://www.aahgs.org/>; accessed 12 November 2024; JewishGen The Global Home for Jewish Genealogy. (2025) Mission. *JewishGen*. <https://www.jewishgen.org/JewishGen/Mission.html>; accessed 2 September 2025.

Survey respondents identified family responsibilities as a primary barrier to sustained participation in genealogical organizations. As one respondent explained, “I became a Mom and did not have time.”<sup>424</sup> Another cited being “a mother of young children” as the reason for experiencing exclusion from organizational activities.<sup>425</sup> These comments reflect a pattern documented across the survey data: participants who entered their prime genealogical research years (the 40s–50s age range identified in Section 5.1.2) during the 1980s and 1990s faced competing demands that earlier generations of genealogists had not experienced to the same degree. By 1988, 75% of women aged 25–54 were employed or seeking employment, fundamentally altering the volunteer base upon which hereditary organizations had historically depended.<sup>426</sup> As Chambré’s research demonstrates, the resulting decline in traditional women’s volunteerism was not unique to this period, substantial turnover and limited time availability have been recurring features of American voluntary engagement whenever major shifts in workforce participation occurred, but the speed and scale of women’s entry into professional employment during the 1970s through 1990s created particular pressures for organizations like the NSDAR and GSMD whose operational models assumed the availability of women with significant discretionary time.<sup>427</sup>

The geographic patterns documented in Section 5.2.2 compound these family structure effects. Rural communities, which reported higher financial barriers to organizational involvement (9.2%) compared with urban (6.1%) and suburban (5.0%) participants, face a dual disadvantage: reduced access to physical genealogical infrastructure (archives, libraries, organizational chapters) and diminished opportunities for the informal intergenerational knowledge transfer that historically occurred through local genealogical societies, church groups, and community organizations. Putnam’s analysis of how geographic mobility and changing family structures disrupted civic knowledge exchanges provides a framework for understanding this shift from informal family-based genealogical learning to the formalized research approaches that now characterize the field.<sup>428</sup> The implications of this transition are further explored in the case studies (Chapters 8 and 9), which document how the NSDAR and GSMD responded to changing participation patterns through institutional adaptations, including flexible meeting formats, digital engagement options, and modified volunteer structures.

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<sup>424</sup>R\_3ivSoBHZi8v56VX. (2022) Study Survey [Unpublished Raw Data].

<sup>425</sup>R\_4N07uFXITSy9olz. (2022) Study Survey [Unpublished Raw Data].

<sup>426</sup>Bureau of Labor Statistics. (1989) *Labor Force Statistics from the Current Population Survey*. U.S. Department of Labor.

<sup>427</sup>Chambré *op. cit.*

<sup>428</sup>Putnam (2000) *op. cit.* pp. 65–67. Putnam’s analysis of declining civic participation in the United States documents how geographic mobility, suburbanization, and changing work patterns disrupted the local social networks through which Americans had traditionally transmitted knowledge about community organizations, including genealogical societies and hereditary organizations. His concept of declining “social capital” provides a framework for understanding why intergenerational knowledge transfer about family history and organizational membership diminished during the study period.

#### 5.4. Economic Barriers to Engagement

The income and educational data presented in the preceding sections establish that contemporary genealogical practitioners within the hereditary organization subculture are disproportionately affluent and highly educated. This section examines how economic barriers operate in practice, focusing on the specific income brackets where financial constraints most acutely limit participation and on the organizational cost structures that compound individual economic pressures.

The highest concentration of participants citing financial obstacles to organizational participation appears in the \$40,000–\$60,000 household income bracket, where 31.0% reported financial barriers, followed by those earning \$20,000–\$40,000 at 26.8%.<sup>429</sup> This distribution reveals a counterintuitive pattern: financial barriers affect middle-income households more than either the highest- or lowest-income groups. Higher-income individuals can afford comprehensive engagement, including membership fees, travel to archives, subscription services, and conference attendance. Lower-income participants, while facing financial constraints, may access alternative pathways through free resources such as FamilySearch, public library programs, and community genealogical societies. Middle-income households, however, fall into what the data suggests is a “missing middle,” earning too much to qualify for fee waivers or free programs but too little to absorb the cumulative costs of sustained genealogical engagement alongside competing household obligations.

Interview participant LH captured this tension: “The hobby has expanded, but our lifestyles haven’t adapted to let us do that . . . I have other things I need to be home for.”<sup>430</sup> LH’s observation points to an intersection between financial constraints and time poverty that the survey data alone cannot fully capture. The expansion of genealogical resources, particularly online databases requiring paid subscriptions, created unprecedented research possibilities during precisely the period when economic pressures on middle-income households intensified. The survey data on professional certification illustrates one dimension of this constraint: as documented in Chapter 6, only 5% of participants hold formal genealogical certifications despite 49% expressing interest, with time constraints (26%) and financial considerations (15%) constituting the primary barriers.<sup>431</sup>

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<sup>429</sup>These figures are derived from survey responses where participants who reported financial barriers to organizational participation were cross-tabulated by household income bracket. The \$40,000–\$60,000 bracket’s 31.0% represents the percentage of respondents within that income range who identified financial constraints as a barrier, not the percentage of all respondents.

<sup>430</sup>LH. (2022) Interviewed by S. Combs-Bennett. 6 July. Zoom.

<sup>431</sup>See Chapter 6, Section 6.1.4, “Seeking Formal Recognition,” for the full analysis of certification barriers including additional survey respondent perspectives on the economic viability of professional credentialing.

The economic dimensions of organizational participation extend beyond individual practitioners to institutional sustainability. Heritage organizations must balance accessibility against operational costs, a tension that directly affects who can participate. The GSMD case study illustrates this challenge: in 2019, the Executive Director reported that the society was “losing \$50 per [new] application, the operational loss being funded by existing members.”<sup>432</sup> This meant that the organization’s commitment to thorough genealogical verification, the very standard that earned GSMD its reputation among lineage societies, created processing costs that exceeded application fees, requiring existing members effectively to subsidize new applicants. This dynamic reveals the complex economic calculus underlying hereditary organization membership: maintaining rigorous documentary standards requires possible genealogical review by staff, which costs money, which must be recouped through fees, which creates financial barriers, which limit participation. Organizations must navigate this tension between accessibility and sustainability, a challenge explored in detail in Chapter 9.

The economic barriers to hereditary organization membership operate through multiple channels that stack upon one another, and the cost structure documented in survey responses reflects an accumulation of direct and indirect expenses that a single application fee figure understates. Direct costs include application fees, which typically range from \$50 to \$200 depending on the organization, and annual dues of \$25 to \$100 or more, alongside optional but socially expected participation costs such as banquet fees, regalia, and travel to meetings. Indirect costs are equally consequential and frequently exceed the direct fees: applicants must obtain certified vital records at \$15 to \$50 per document depending on the jurisdiction, hire professional genealogists at \$25 to \$75 or more per hour when research demands exceed their own expertise, pay subscription fees for genealogical databases (Ancestry.com's highest tier exceeds \$400 annually), and travel to archives holding records that have not been digitized. For an applicant who qualifies for multiple hereditary organizations, a common circumstance, as Chapter 9 documents regarding the GSMD's encouragement of supplemental applications, these costs multiply accordingly. The cumulative financial commitment required to document a single lineage to the standards of a single organization can therefore reach figures substantially in excess of the headline application fee, and the burden of documenting multiple lineages across multiple organizations intersects with the geographic and middle-income barriers documented elsewhere in this chapter to produce the patterns of stratified participation the survey data

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<sup>432</sup>General Society of Mayflower Descendants. (2019) *Report of the Executive Director*. In: *General Society of Mayflower Descendants Annual Report*. The GSMD is widely regarded within the hereditary organization subculture as maintaining the most rigorous genealogical verification standards of any American lineage society. Its application review process employs professional genealogists who evaluate each generational link in an applicant’s lineage, a level of scrutiny that exceeds what most other hereditary organizations require. This reputation as the “gold standard” reflects both the organization’s investment in verification infrastructure and the relatively well-documented nature of Plymouth Colony records, which provide a strong evidentiary foundation for the earliest generations of Mayflower descent.

reveal. Interview participants articulated this cumulative burden in concrete terms, as Chapter 7 documents.<sup>433</sup>

As documented in Section 5.2.2, geographic location further amplifies economic barriers: rural participants reported higher financial barriers (9.2%) compared with urban (6.1%) and suburban (5.0%) participants, reflecting not only income differentials but also the additional costs of travel to archives and organizational meetings concentrated in urban areas. These geographic and economic barriers interact to create patterns of participation that reflect structural advantages for metropolitan, higher-income practitioners—patterns that the democratization narrative surrounding contemporary genealogy often overlooks.

## **5.5. How the Community Defines Itself**

Identity within genealogical communities emerges through an interplay of language, perception, and professional aspiration, shaping not only how practitioners view themselves but also how the field positions itself within broader academic and institutional contexts. This section examines the genealogical community's self-conception through three lenses: the ongoing debate over professional terminology, the persistence of stereotypes that both reflect and distort demographic realities, and the fundamental tension between hobby and profession that continues to define the field's institutional development. These contemporary patterns have deep historical roots, as documented in Chapter 2. The perception of genealogists as idle hobbyists competed with recognition of professional genealogical practice from the nineteenth century onward, and the survey data reveal how these tensions persist in contemporary form.

### **5.5.1. The Genealogy vs. Family History Divide**

The relationship between professional terminology and community identity reveals dynamics within genealogical practice that reflect broader questions about the field's disciplinary status, shown in Figure 20. Survey participants indicate that a clear majority (61.9%) use the terms “genealogy” and “family history” interchangeably, with statistical analysis indicating that 60.2%–65.8% of practitioners in the broader population follow this pattern. Among those who maintain distinctions between the terms (36.4%), approximately two-thirds (67.7%) believe the

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<sup>433</sup>These figures are drawn from publicly available fee schedules of the organizations studied (NSDAR, GSMD, Jamestowne Society, Sons of the American Revolution, and others) as of the period of data collection (2022), and from practitioner experience within the hereditary organization subculture. Fee schedules are subject to revision; the ranges presented reflect the typical structure across organizations rather than current figures for any specific society.

terms refer to fundamentally different activities, often associated with perceived differences between amateur and professional practice.<sup>434</sup>

This terminological debate carries more significance than mere semantics. As Martin observes, the distinction between genealogy and historical inquiry has been characterized as a “schism” that obscures a fundamental interdependency between the two fields.<sup>435</sup> Within the hereditary organization subculture specifically, the choice of terminology can signal different relationships to institutional authority: “genealogy” tends to carry connotations of systematic research governed by evidentiary standards such as the Genealogical Proof Standard, while “family history” is more often associated with narrative-driven, personal exploration. Yet the survey data suggests that these connotations are weakening.

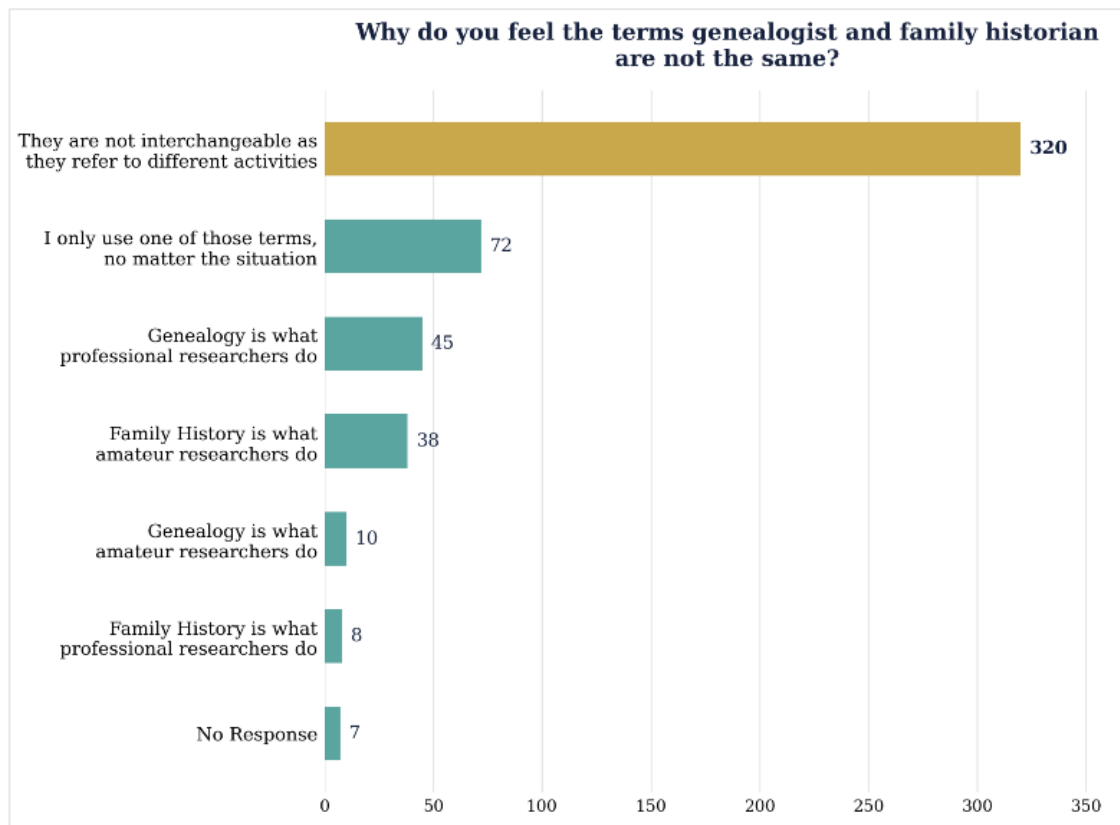
When examining the relationship between terminology usage and professional perception, only weak associations between word choice and professional recognition were found. Whether practitioners use the terms interchangeably or maintain distinct meanings appears to be more a matter of personal preference than an indicator of professional status or research capability. Both groups show elevated levels of professional recognition, with over 80% of practitioners in each category viewed as serious or experienced researchers.<sup>436</sup>

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<sup>434</sup>Survey data: Q19 (n = 1164). Of those who do not use the terms interchangeably (n = 424), 320 (67.7%) indicated they refer to different activities, while smaller numbers associated each term with either amateur or professional practice. For readers unfamiliar with these terminological distinctions: within the genealogical community, “genealogy” traditionally refers to the systematic documentation of family lineages through verified evidence, governed by standards such as the Genealogical Proof Standard (GPS)—a framework requiring reasonably exhaustive research, complete citations, skilled analysis, resolution of conflicting evidence, and a soundly reasoned conclusion. “Family history” is often used more broadly to encompass narrative accounts of ancestors’ lives, historical contexts, and family stories that may not meet formal genealogical evidentiary standards. In practice, many practitioners use both terms to describe overlapping activities.

<sup>435</sup>Martin *op. cit.* p. 2.

<sup>436</sup>Survey data: Q21 and Q22. When someone introduces themselves as a “family historian,” 579 respondents view them as serious about research and 532 as a hobbyist; when introduced as a “genealogist,” 723 view them as serious and 517 as professional.



**Figure 20:** Reasons given by survey respondents for distinguishing between the terms "genealogist" and "family historian" (n = 500). Among the 36.4% of participants who do not use the terms interchangeably, the majority (n = 320, 67.7%) believe the terms refer to fundamentally different activities. A further 72 respondents (15.2%) use only one term regardless of context. Responses associating "genealogy" with professional practice (n = 45) outnumbered those associating "family history" with professional practice (n = 8), suggesting that within this subculture the term "genealogist" carries stronger professional connotations. The remaining 61.9% of all survey respondents who use the terms interchangeably are not represented in this figure.

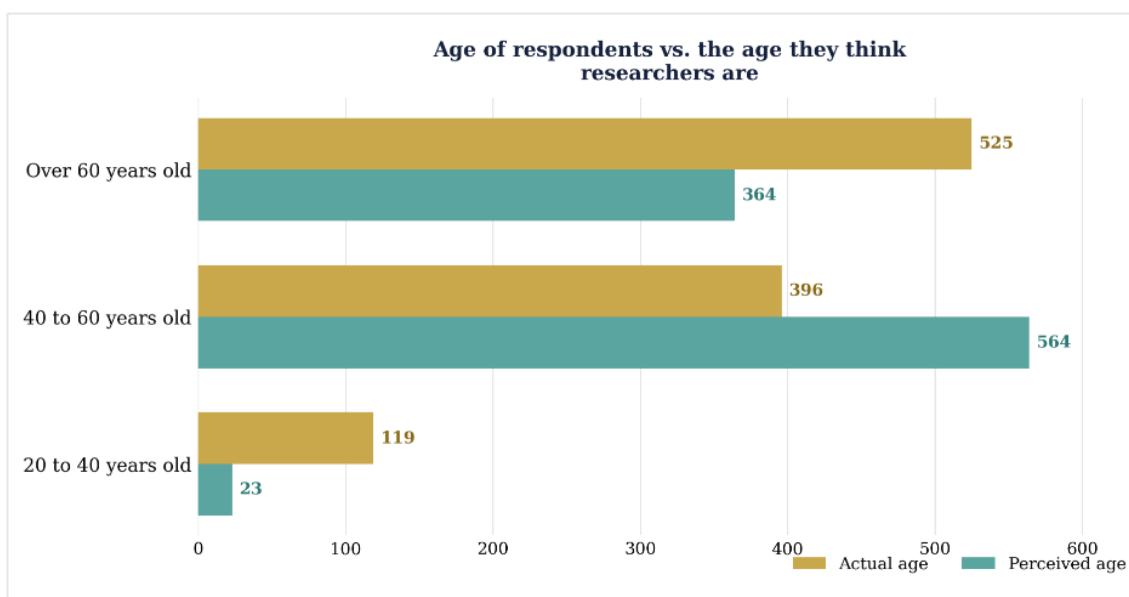
This pattern suggests that the genealogical field has matured to the point where professional status is determined by factors other than terminological preferences. While debates over terms persist, they do not appear to impact peer perceptions of professional standing, allowing for methodological and philosophical diversity while maintaining high professional standards across different approaches to genealogical investigation.

### 5.5.2. Confronting Stereotypes

Survey participants' characterizations of typical genealogical practitioners reveal significant disparities between perception and demographic reality. The results show that 92.6% of participants reported conducting family history research themselves, whereas only 6.9% had

never engaged in genealogical research.<sup>437</sup> This high participation rate, although potentially reflecting self-selection bias inherent in the survey’s distribution through genealogical networks, suggests that engagement with family history extends broadly within the surveyed community.

Participants envision family historians as middle-aged or older adults, with nearly half (48.5%) believing researchers typically fall in the 40–60 age range and another 31.3% depicting them as over sixty (Figure 21). This perception proves statistically significant ( $\chi^2 = 946.46$ ,  $p < 0.001$ ), indicating strong community beliefs that genealogical research primarily attracts older adults, particularly retirees.<sup>438</sup> Notably, only 2% of participants thought researchers were typically young adults (20–40), and no participant believed researchers were usually under twenty, despite evidence of younger engagement documented in the third generational cohort identified in Section 5.1.3. As interviewee BJ discussed: “My husband tells me that all my hobbies are that of an 80-year-old woman. And I’ve just learned to accept this about myself. And so being so young, but I started doing genealogy when I was sixteen, that’s now [more] than half of my lifetime.”<sup>439</sup>



**Figure 21:** Age of survey respondents compared with the age they believe genealogical researchers typically are ( $n = 1,164$ ). Gold bars represent the actual age distribution of survey respondents; teal bars represent respondents' perception of the typical researcher's age. While the largest cohort of actual respondents falls in the over-60 range ( $n = 525$ ), nearly half of all participants (48.5%,  $n = 564$ ) believe researchers are typically aged 40–60. The gap is most pronounced at the younger end: 119 respondents were themselves aged 20–40, yet only 23 (2.0%) believed researchers were typically that age. No participant believed researchers were usually under twenty. The difference between actual and perceived age distribution is statistically significant ( $\chi^2 = 946.46$ ,  $p < 0.001$ ).

<sup>437</sup>Survey data: Q10 ( $n = 1164$ ). Yes = 1078 (92.6%), No = 80 (6.9%), No response = 6 (0.5%).

<sup>438</sup>Survey data: Q11 ( $n = 1164$ ). 40–60 years old = 564 (48.5%), Over 60 = 364 (31.3%), 20–40 = 23 (2.0%), Under 20 = 0 (0.0%), No opinion = 207 (17.8%).

<sup>439</sup>BJ. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

BJ's self-deprecating acceptance of genealogy's age-based stereotyping reveals how cultural narratives about who "should" pursue family history research create invisible barriers for younger practitioners. The social stigma associated with engaging in what is perceived as an older person's pursuit may discourage participation among demographics essential to organizational sustainability, while simultaneously reinforcing perceptions that heritage organizations serve elderly populations rather than diverse communities across generational boundaries. BJ's long tenure in genealogical research demonstrates that personal commitment can overcome cultural barriers, but her experience also highlights obstacles that less determined practitioners might find discouraging. These stereotypes operate differently across genealogical subcultures: within Mormon communities, genealogical engagement begins as a young-adult religious obligation rather than a retirement pursuit, and commercial genealogy platforms marketed by companies like Ancestry.com and 23andMe explicitly target younger demographics through DNA testing services framed as identity exploration rather than traditional genealogical research.

Gender perceptions reveal additional divergence between community assumptions and demographic realities. Most participants (44.7%) characterize genealogy as primarily women's work, while a third (39.6%) perceive equal gender distribution in the field. The notable disparity between perceptions of female dominance (44.7%) and male dominance (2.1%) suggests a strong cultural association of genealogical research with women, despite the variety of research approaches employed by practitioners of all backgrounds.<sup>440</sup> This gendered perception has particular implications for hereditary organizations: although male-only organizations such as the SAR exist alongside the DAR, the broader cultural framing of genealogy as "women's work" may influence recruitment, volunteer patterns, and organizational culture, warranting further investigation.

### **5.5.3. The Hobby or Profession Conundrum**

The most unified perception concerns genealogists' professional status: an overwhelming majority (59.3%) view genealogy as primarily a hobby pursued alongside other careers, whereas only 1.6% consider it a professional field. About one-fifth (20.9%) associate genealogical practice with retirees, suggesting that participants view family history research as a retirement pursuit rather than a primary occupation.<sup>441</sup> This perception carries implications for professional

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<sup>440</sup>Survey data: Q12 (n = 1164). The historical roots of genealogy's gendered perception are discussed in Chapter 2, where nineteenth-century newspaper accounts simultaneously encouraged young women to become professional genealogists while framing the activity as particularly suited to feminine temperament and patience.

<sup>441</sup>Survey data: Q13 (n = 1164). Hobby alongside other careers = 59.3%, Retirees = 20.9%, Professional field = 1.6%.

development, institutional engagement, and the field's relationship to academic and commercial genealogical services, and stands in tension with the sophisticated methodological requirements that hereditary organizations impose on their members, as documented in subsequent chapters.

In her interview, AL reinforced this conundrum: "You know, when you, when you find something that you really love, and you, you get a chance to do it when you retire because you didn't have time to do it before... that's how I came to professional genealogy. I retired. I opened up all the boxes of stuff I inherited from my mother... And then I learned that there was such a thing as professional genealogy."<sup>442</sup> AL's trajectory, from inherited family materials to professional practice via retirement, illustrates both how the hobby/profession boundary remains permeable and how the perception of genealogy as a retirement activity shapes practitioners' own understanding of when and how to engage with the field.

The distinction between perception and reality has direct implications for field development and institutional participation. The perception of genealogy as primarily the domain of older hobbyist researchers may create barriers for younger individuals or those considering professional careers in genealogical services. MK embodies this boundary in her statement: "I took some professional training, but I am a hobbyist because I decided that it upped my own skills for my own personal research, but I did not decide to pursue a career with it."<sup>443</sup> MK's decision to invest in professional-level training while identifying as a hobbyist illustrates the blurred line between amateur and professional practice that characterizes genealogical engagement. A blurring that complicates institutional assumptions about who their members are and what level of expertise they bring to organizational activities.

These perceptions of genealogy as gendered, age-specific, and amateur intersect to create complex dynamics within genealogical institutions. Lingering perceptions of genealogy as a gendered activity may influence who feels welcome to participate, while the hobby characterization may undermine efforts to establish genealogy as a serious academic or professional field. Yet the survey evidence also reveals that these stereotypes coexist with sophisticated research practice: as documented in Chapter 6, over 90% of non-professional practitioners identify as intermediate or advanced despite limited formal credentials, suggesting that the community's actual capabilities significantly exceed the stereotypes that its members perpetuate about themselves. This disconnect between perceived identity and demonstrated competence shapes the institutional landscape examined in the case study chapters.

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<sup>442</sup>AL. (2022) Interviewed by S. Combs-Bennett. 7 July. Zoom.

<sup>443</sup>MK. (2022) Interviewed by S. Combs-Bennett. 1 July. Zoom.

## 5.6. Today's Community

The demographic portrait that emerges from this chapter's analysis documents a genealogical community within the hereditary organization subculture that has undergone fundamental transformation since the 2001 Fullerton study, while retaining characteristics that shape institutional dynamics, research methodologies, and barriers to participation. The patterns documented across the preceding sections, increasing feminization of practice, significant economic stratification, exceptionally high educational attainment, and the emergence of distinct generational cohorts, collectively reveal a community that has expanded in some directions while narrowing in others with respect to demographic diversity and accessibility.

The data challenges simple narratives about genealogy's democratization. Technological innovations of the study period (1970–2020) undeniably expanded access to genealogical records and research tools, yet the community of practitioners engaging with hereditary organizations has simultaneously become more concentrated among affluent, highly educated, older women of European descent. The “missing middle” documented in Section 5.4, where middle-income households face the highest proportional financial barriers, suggests that expanded technological capabilities have not translated into equitable access to organizational participation. These patterns reflect broader trends in American voluntary association and leisure participation during the same period, but they carry particular significance for hereditary organizations whose mission statements invoke democratic ideals and patriotic service.<sup>444</sup>

The persistent gaps between practitioners' self-perceptions and demographic realities, documented in Section 5.5, reveal how cultural narratives about genealogical participation create self-reinforcing cycles. TK captured this dynamic after a visit to the DAR library: “I went over to the DAR library on Friday... I went there, and every time I go there, I'm kind of amused that the only other people in the library are kind of the stereotypical old ladies.”<sup>445</sup> TK's observation illustrates how demographic realities can reinforce stereotypical perceptions, creating patterns in which organizations attract practitioners who match existing membership profiles while inadvertently signaling to those who do not fit the profile that they may not belong. The factors driving this homogeneity extend beyond individual preferences to encompass structural considerations, institutional locations, operating hours, meeting formats,

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<sup>444</sup>For the parallel patterns in American voluntary association participation, see Chambré *op. cit.*; Putnam *op. cit.* For economic stratification across American hobbies during the same period, see Cortada *op. cit.* p. 160. Hjorthén's concept of “the capitalization of longing” provides a complementary analytical lens: the expansion of genealogical practice has been driven substantially by organizations, businesses, and media seeking to profit from people's desire for ancestry, complicating simple narratives of organic democratization. See Hjorthén *op. cit.* p. 5.

<sup>445</sup>TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

application costs, and organizational culture that systematically advantage practitioners with demographic characteristics.

These demographic foundations carry direct implications for the chapters that follow.<sup>446</sup> The economic stratification documented here shapes access to the professional development pathways examined in Chapter 6, where the gap between certification interest (49%) and achievement (5%) reflects financial and temporal barriers that are themselves products of the income distribution patterns documented in this chapter. The generational cohort differences identified in Section 5.1.3 influence how practitioners engage with the evolving documentation standards and verification technologies examined in Chapters 8 and 9. The ethnic homogeneity of the survey sample, documented in Section 5.2.3, reflects the specific characteristics of the hereditary organization subculture rather than the broader genealogical landscape. A distinction that becomes essential for interpreting the case studies evidence about organizational culture and membership practices. Understanding who participates in hereditary organizations, and who does not, provides the necessary context for evaluating whether the institutional patterns documented in subsequent chapters represent intentional exclusion, structural inertia, or the complex intersection of historical documentation barriers with contemporary social realities.

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<sup>446</sup>The distinction between “structural limitations” and “addressable barriers” introduced in Chapter 1 (Section 1.4) is essential for interpreting this chapter’s demographic findings. Structural limitations are inherent to hereditary organizations’ founding purposes as lineage societies: they require documented biological descent from specific historical populations, and this requirement necessarily excludes individuals who cannot produce such documentation, regardless of the organization’s intentions. Addressable barriers, by contrast, are obstacles that organizations can modify through policy changes: application fees, information accessibility, meeting formats, geographic accessibility, and subjective “personal acceptability” standards. The demographic patterns documented in this chapter reflect a combination of both types of limitation, and the case study chapters (8 and 9) examine how the NSDAR and GSMD have addressed the barriers within their control while acknowledging the structural constraints inherent to their organizational models.

## **Chapter 6 Navigating the Spectrum of Genealogical Practice**

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Chapter 5 documented who participates in genealogical research within the hereditary organization subculture: their demographics, educational backgrounds, and evolving community composition. This chapter turns to the question of how that participation takes shape, how practitioners within and around this subculture identify along the spectrum from hobbyist to certified professional, how they build expertise through formal and informal pathways, and what these patterns reveal about the institutional structures that shape genealogical practice. It examines how self-identifications relate to specific research practices, institutional relationships, and methodological approaches, exploring the pathways through which genealogical expertise develops, the barriers that influence professional development, and the implications of these patterns for understanding the field's institutional evolution. This foundation establishes the analytical framework for examining the relationships between genealogical researchers and heritage organizations in subsequent chapters.

The landscape of genealogical research has undergone a substantial transformation in recent decades, raising questions about the relationship between amateur enthusiasm and professional expertise. Understanding these dynamics requires examining how contemporary practitioners navigate the spectrum from casual family history exploration to rigorous professional research, employing diverse approaches shaped by their training, institutional engagement, and methodological sophistication. Within the hereditary organization subculture specifically, these dynamics carry weight because membership verification demands documentary rigor that often exceeds what casual family history research requires, creating a distinctive pressure toward methodological sophistication that does not operate in the same way across other genealogical communities.<sup>447</sup>

Central to this analysis is the recognition that genealogical practice exists where individual identity formation intersects with institutional expectations and technological capabilities. The field encompasses multiple levels of methodological rigor while maintaining accessibility to diverse participants, creating complex tensions between democratization and professionalization that influence both individual research practices and organizational policies. These tensions become particularly evident when examining how practitioners integrate emerging technologies, such as genetic genealogy, into established documentary frameworks, one of the field's most significant methodological developments in recent history. Yet the meaning and application of

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<sup>447</sup> See Chapter 1, Section 1.5, for the full analytical framework positioning hereditary organizations within the broader genealogical landscape, and Chapter 5, Section 5.5, for demographic self-identification patterns within this subculture.

these developments differ markedly across genealogical subcultures. Within the hereditary organization ecosystem, DNA evidence occupies a contested position that reflects broader institutional commitments to documentary proof of biological lineage, as subsequent sections of this chapter examine.<sup>448</sup>

A distinguishing feature of the hereditary organization subculture, one that separates it from both professional genealogical practice and other genealogical communities, concerns the definition of family itself. Professional genealogists and broader genealogical societies have increasingly embraced expansive definitions of relatedness that encompass adoption, affinity, and chosen kinship.<sup>449</sup> As early as 1983, Walter Lee Sheppard Jr., a Fellow of the American Society of Genealogists and a prominent voice in professional genealogical standards, argued that family includes those connected not by blood but through marriage and other bonds.<sup>450</sup> Hereditary organizations, by contrast, maintain bloodline-based membership requirements that define lineage exclusively through biological descent documented by paper records. This structural distinction does not render hereditary organizations inherently discriminatory in intent; contemporary organizations demonstrate sustained efforts toward procedural fairness and inclusion within the parameters of their founding mandates, but it does produce institutional outcomes that differ fundamentally from those of genealogical communities organized around interest, geography, ethnicity, or religious affiliation rather than documented biological descent. Recognizing this distinction is essential for interpreting the professional identity and expertise patterns examined in this chapter, because the pathways through which practitioners develop skills within the hereditary organization subculture are shaped by documentary requirements that do not govern expertise development in other genealogical contexts.

### 6.1. From Amateur Enthusiasm to Expert Authority

The boundary between amateur and professional in genealogy has never been clearly defined, and that ambiguity is precisely what makes the field's professional landscape distinctive. Unlike medicine or law, where professional status requires specific credentials and licensure, genealogy occupies a space where expertise develops through multiple pathways, some formal, most informal. Interview participant T.R., a member and officer of the District of Columbia Society of the Sons of the American Revolution (SAR) who also conducts professional genealogical research, expressed this tension directly: "I do genealogy professionally, and I always hesitate

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<sup>448</sup> For the detailed treatment of these diverse genealogical communities, see Chapter 1, Section 1.5. Key scholarship on distinct genealogical subcultures includes Nelson *op. cit.*; Akenson *op. cit.*; Jacobson *op. cit.*

<sup>449</sup> Morgan (2021) *op. cit.* p. 9. See also Zerubavel *op. cit.* p. 9.

<sup>450</sup> Sheppard, Walter Lee, Jr. (1983) Roots in Local History. *National Genealogical Society Quarterly*. March. 71(1). pp. 29–35. Sheppard explicitly recognized family as including those connected not by blood but by marriage.

whether I should, uh, you know, say that or not. It's not like being a lawyer. You go to law school, you pass the bar, then you, you know, now you're a lawyer."<sup>451</sup> T.R.'s hesitation reflects a structural reality of the genealogical field: the absence of mandatory licensure means that professional identity is self-asserted and peer-validated rather than institutionally conferred, creating ongoing uncertainty about what constitutes professional standing. This section examines how contemporary genealogists within the hereditary organization subculture navigate this ambiguous terrain, developing research skills and professional identities that often defy traditional categorization.

### 6.1.1. Professional Identity Within the Hereditary Organization Subculture

Survey data indicate that 677 participants (58.2%) identified themselves as genealogists or family history researchers who conduct research for themselves, their family, friends, or others without compensation. At the same time, 171 individuals (14.7%) positioned themselves as professionals in related fields, including historians, archivists, librarians, and certified genealogists.<sup>452</sup> This distribution reflects the field's complex relationship with professionalization, where expertise develops through diverse pathways that extend beyond conventional academic or certification routes. Elizabeth Shown Mills's typology of genealogical practitioners, distinguishing among "family tree climbers," "traditional genealogists," and "generational historians," captures a spectrum of engagement that the survey data confirm remains operative within the hereditary organization subculture.<sup>453</sup>

The professional identity patterns observed here carry particular significance within the hereditary organization context. The two primary credentialing bodies for genealogists in the United States—the Board for Certification of Genealogists (BCG), whose Certified Genealogists bear the postnominal "CG," and the International Commission for the Accreditation of Professional Genealogists (ICAPGen), whose Accredited Genealogists bear the postnominal "AG," establish standards that apply across the genealogical field, not specifically within hereditary organizations.<sup>454</sup> Practitioners within the hereditary organization subculture navigate a dual set of expectations: the standards set by professional credentialing bodies and the documentary requirements imposed by the organizations themselves. This dual

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<sup>451</sup> Interview with T.R., 2022. T.R. is a member and officer of the District of Columbia Society, Sons of the American Revolution, who also conducts professional genealogical research.

<sup>452</sup> Survey data, 2022. Of the 1,164 participants who completed the survey, 677 (58.2%) identified as non-professional genealogists/family history researchers. See Chapter 4 for full survey methodology.

<sup>453</sup> Mills (2003) *op. cit.* Mills distinguishes between "family tree climbers," "traditional genealogists," and "generational historians," arguing that professional genealogical practice constitutes a distinct scholarly discipline.

<sup>454</sup> See Chapter 2, Section 2.6, for the history of the Board for Certification of Genealogists (BCG) and the International Commission for the Accreditation of Professional Genealogists (ICAPGen), both of which admitted their first credentialed practitioners in 1964.

accountability shapes professional identity in ways that differ from genealogists whose practice centers on client service, academic research, or community-based projects.

Most participants who identify as non-professional researchers demonstrate advanced methodological sophistication, with over 90% indicating intermediate or advanced skill levels in genealogical research.<sup>455</sup> These self-assessments suggest significant investment in developing expertise through informal pathways, though they may also reflect evaluations within peer networks rather than objective measures of professional competency. The high proportion of advanced self-identification indicates that genealogical expertise within this subculture develops through sustained engagement with research practices, community participation, and continuous learning rather than through formal credentialing alone.

The educational commitment among self-identified non-professional researchers extends across multiple learning modalities. Local genealogical societies play a central role, with 55% of participants regularly attending regional conferences and similar gatherings that offer networking and learning opportunities.<sup>456</sup> These societies function as knowledge-sharing communities in which practitioners develop expertise through peer interaction, mentorship, and collaborative problem-solving that transcend formal educational structures. This pattern of community-based expertise development is not unique to the hereditary organization subculture—Mormon genealogists, for instance, benefit from the Church of Jesus Christ of Latter-day Saints' extensive Family History Center network and structured volunteer training programs, while African American genealogical communities have developed specialized expertise in working with Freedmen's Bureau records, slave schedules, and other sources that address the documentary gaps created by slavery.<sup>457</sup> What distinguishes the hereditary organization context is that expertise development is shaped by the specific documentary requirements of lineage verification, creating a distinctive emphasis on primary-source analysis, chain-of-evidence documentation, and familiarity with colonial-era and early American records.

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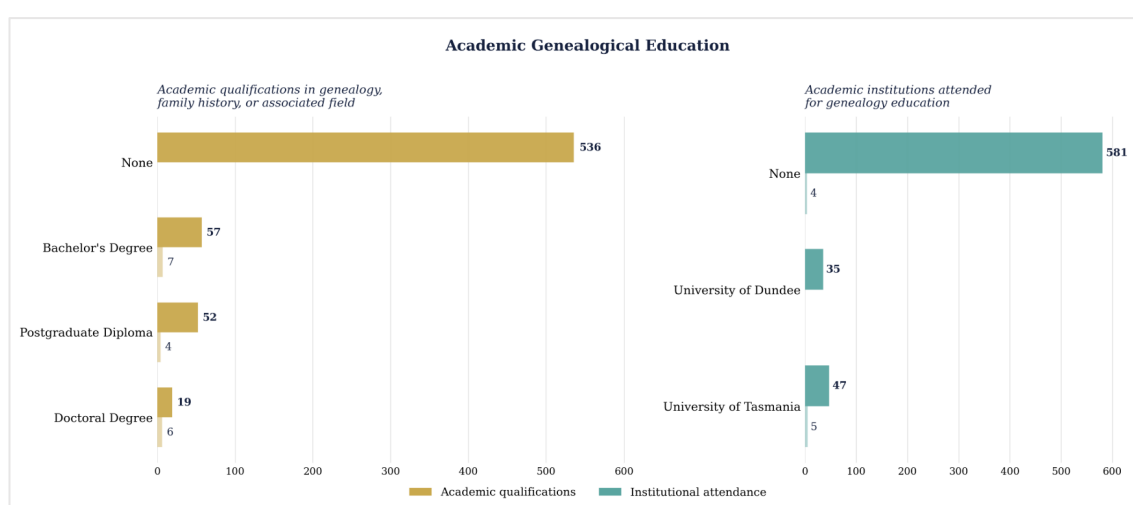
<sup>455</sup> Survey data, 2022. Self-assessment of skill levels among non-professional researchers. These self-assessments should be interpreted cautiously, as they reflect perceptions within peer networks rather than externally validated measures of competency.

<sup>456</sup> Survey data, 2022. Educational engagement patterns among survey participants.

<sup>457</sup> Allen, James B., Embry, Jessie L. and Mehr, Kahlile B. (1995) *Hearts Turned to the Fathers: A History of the Genealogical Society of Utah, 1894–1994*. Provo, Utah: BYU Studies, Brigham Young University. pp. 187, 189–190, 265. The LDS Church's Family History Library system and network of Family History Centers provide structured volunteer training programs and free access to records, creating a distinctly different model of expertise development than the self-directed, fee-based educational pathways characteristic of the hereditary organization subculture.

### 6.1.2. How Genealogists Build Expertise

Despite the large number of participants holding advanced degrees in various fields, approximately 80% reported having no academic qualifications specifically in genealogy or related fields. As Chapter 5 documented, 78.9% of surveyed practitioners hold advanced degrees overall, a figure that significantly exceeds the national average, yet the overwhelming majority of those credentials were earned in disciplines other than genealogy. This disparity underscores how genealogical expertise evolves through interdisciplinary knowledge transfer, in which skills from other academic domains augment research capabilities, while genealogically specific knowledge develops through alternative pathways. Both patterns are shown in Figure 22, and a list of genealogical degree programs is in Appendix 2.



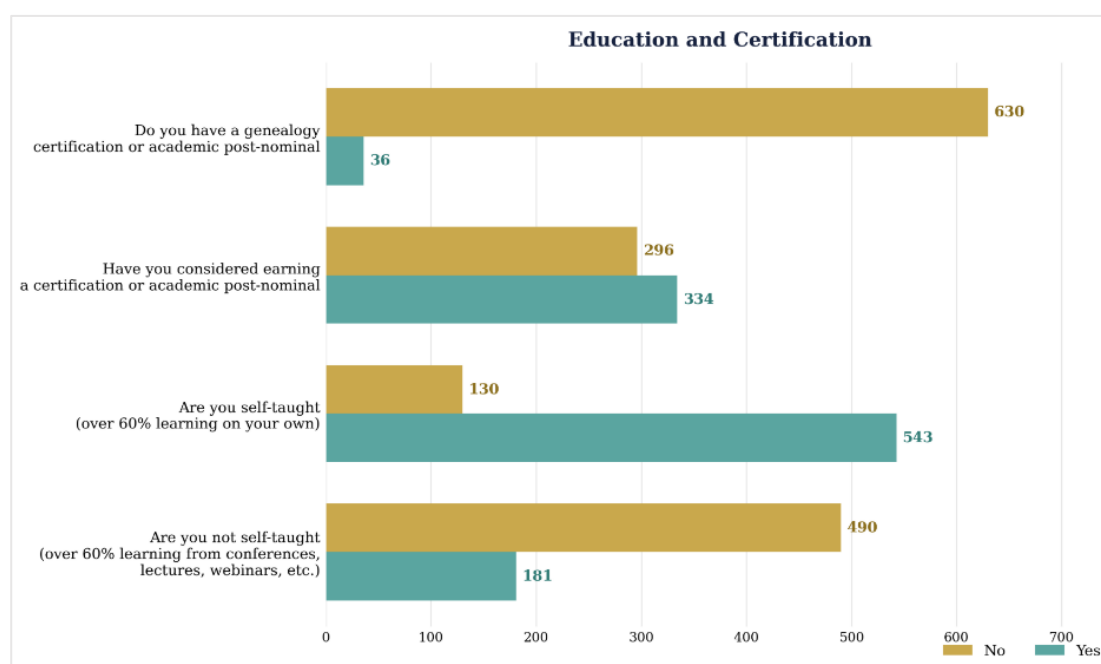
**Figure 22:** Academic qualifications and institutional attendance among survey respondents for genealogy-specific education ( $n = 1,164$ ). Gold bars indicate respondents' academic qualifications in genealogy, family history, or an associated field (history, library science, archival studies); teal bars indicate attendance at academic institutions offering genealogy programs. The majority of respondents hold no formal academic qualification specifically in genealogy ( $n = 536$ , approximately 80%) and have attended no genealogy-specific academic institution ( $n = 581$ ). Among those with formal qualifications, Bachelor's degrees are most common ( $n = 57$ ), followed by Postgraduate Diplomas ( $n = 52$ ) and Doctoral degrees ( $n = 19$ ). The University of Tasmania ( $n = 47$ ) and the University of Dundee ( $n = 35$ ) account for the majority of institutional attendance, reflecting the limited number of universities offering dedicated genealogical studies programs. A full list of genealogical degree programs is provided in Appendix 2.

Survey participants illustrate the interdisciplinary nature of this expertise development. One noted, “I earned a PhD in Psychology and my National License. I’m done proving myself to others,”<sup>458</sup> reflecting how credentials from other fields provide analytical confidence that transfers to genealogical practice. Another emphasized formal academic credentials within

<sup>458</sup> R\_2lSKjp7zw6nCnFD. (2022) Study Survey [Unpublished Raw Data]. Participant open-response: “I earned a PhD in Psychology and my National License. I’m done proving myself to others.”

library science: “Master’s degree of library science; certification in creating name authority records for the Library of Congress.”<sup>459</sup> These responses illustrate how credentials from adjacent fields provide psychological confidence that transfers to genealogical practice, even without genealogy-specific certification. The resistance to “proving” oneself through additional credentialing reflects a pragmatic assessment of certification’s value, creating challenges for field-wide standardization efforts. Within the hereditary organization subculture, specifically, the implications extend further: organizations rely on genealogical reviewers to verify lineage applications, and the quality of that verification depends on expertise that, in most cases, is self-developed rather than formally validated.

The relationship between formal education and professional development reveals patterns that challenge assumptions about credentialing in genealogical practice, as shown in Figure 23. Approximately 8% of participants hold bachelor’s degrees in genealogically related fields, 7% hold master’s degrees, and fewer than 1% hold doctoral degrees. These low percentages of specialized academic credentials, contrasted with high overall educational attainment, confirm that genealogical expertise develops through the synthesis of knowledge from multiple disciplines rather than through specialized academic programs alone.



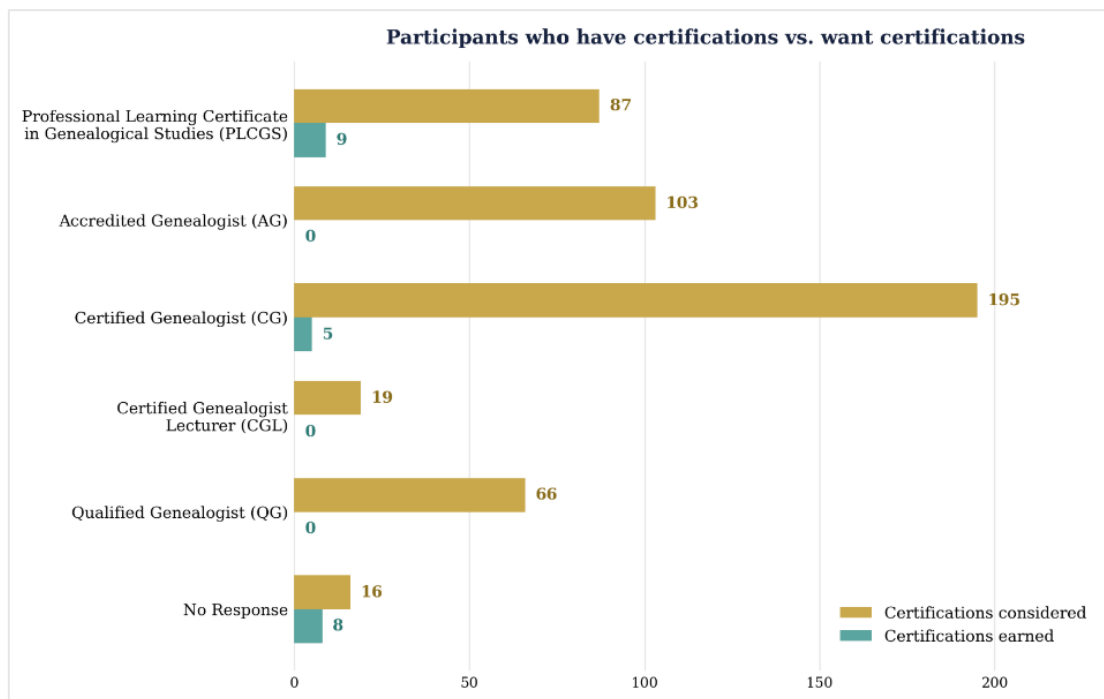
**Figure 23:** Self-directed learning and professional credentialing among survey respondents (n = 1,164). Gold bars indicate respondents answering “No”; teal bars indicate respondents answering “Yes.” The majority of practitioners are self-taught (n = 543, 46.7%), acquiring genealogical knowledge independently rather than through formal institutional instruction. A further 490 respondents (42.1%) reported learning primarily through conferences, lectures, and webinars rather than self-directed study. While 334 respondents (28.7%) have considered earning a genealogical certification or academic post-nominal, only 36 (3.1%) currently hold one, confirming that formal credentialing remains the exception

<sup>459</sup> R\_eVWVVnCOYYzhfNL. (2022) Study Survey [Unpublished Raw Data]. Participant open-response: “Master’s degree of library science; certification in creating name authority records for the Library of Congress.”

rather than the norm within the hereditary organization subculture. These patterns reflect genealogy's development as a field in which expertise accumulates through experience and informal professional networks rather than through standardized academic pathways.

### 6.1.3. Seeking Formal Recognition

The disparity between current certification rates and expressed interest indicates barriers to professional development pathways. While only approximately 5% of participants hold professional genealogy certifications, 49% have considered pursuing them, indicating substantial unmet demand for professional credentialing opportunities (Figure 24).<sup>460</sup> This gap between interest and achievement signals systemic obstacles in the professional development pipeline that limit the field's capacity to expand its certified practitioner base.



**Figure 24:** Genealogical certifications and post-nominals considered versus earned by survey respondents (n = 1,164). Gold bars indicate certifications respondents have considered pursuing; teal bars indicate certifications currently held. The Certified Genealogist (CG) credential issued by the Board for Certification of Genealogists is the most widely considered certification (n = 195), yet only five respondents hold it. The Accredited Genealogist (AG) credential was considered by 103 respondents but held by none, and the Qualified Genealogist (QG) was considered by 66 respondents but held by none. The Professional Learning Certificate in Genealogical Studies (PLCGS) has the highest completion rate relative to consideration (9 earned vs. 87 considered), likely reflecting its lower cost and accessibility compared with examination-based credentials. The gap between interest and achievement across all credential types reflects the financial and time barriers to professional certification documented in this section.

<sup>460</sup> Survey data, 2022. Certification interest and barriers. The gap between expressed interest (49%) and current certification (approximately 5%) is also referenced in Chapter 5, Section 5.4, in the context of economic gatekeeping patterns.

Economic barriers constitute the most significant obstacle to professional development, with 42.9% of participants citing financial constraints as preventing them from pursuing certification. Time constraints represent the second most significant barrier (26%), followed by cost considerations (15%), knowledge gaps (12%), and fear of failure (3%). One participant explained their situation directly: “Wish I could. They cost too much. I am disabled (\$960/month). Hubby has started drawing Social Security, so there will be some discretionary funds soon! Have to catch up on ‘more important stuff’ first.”<sup>461</sup> This account demonstrates how certification’s financial barriers intersect with life circumstances, creating compounding obstacles that dedication alone cannot overcome. Within the hereditary organization context, these economic barriers compound further: membership application costs, travel to archives, and fees for professional genealogical review of lineage documentation add to the financial demands practitioners face.

The questioning of certification’s value reflects deeper tensions regarding the relationship between formal credentials and practical expertise in genealogical research. Some participants express skepticism about the necessity, noting, “Unless I planned to charge people money, I don’t need a paper saying I’m good,” and “Learning about my own family is enough.” Others question economic viability: “Not confident the return on investment would be sufficient (economic and time).”<sup>462</sup> These responses reveal distinct frameworks for evaluating certification’s relevance: instrumental value, personal satisfaction, and cost-benefit calculation. Together, they illustrate how the decentralized nature of genealogical practice, where practitioners pursue research for diverse motivations beyond professional service, complicates efforts to establish universal credentialing standards.

Yet participants also recognize the potential value of formal credentialing within a field that lacks standardized academic pathways. Interview participant A.L., a DAR member who pursued professional genealogical education after retirement, observed: “I think that both certification and accreditation are needed because so many of us are self-educated or have put together this patchwork of educational opportunities. I think there is a need for an examination, a test of how well we do... particularly because we don’t have an academic path... I can’t put my diploma on my wall and say, yeah, somebody said that I’m good enough to do this.”<sup>463</sup> A.L.’s perspective acknowledges certification as a necessary validation mechanism in a field where expertise typically develops through what she characterizes as a “patchwork” of informal pathways. Her observation that practitioners cannot “put my diploma on my wall” highlights a fundamental

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<sup>461</sup> R\_0k4gmnLaJxdgK1b. (2022) Study Survey [Unpublished Raw Data]. Participant open-response: “Wish I could. They cost too much. I am disabled (\$960/month). Hubby has started drawing Social Security, so there will be some discretionary funds soon! Have to catch up on ‘more important stuff’ first.”

<sup>462</sup> R\_2pPuboD59EDIBAS. (2022) Study Survey [Unpublished Raw Data]; R\_3PRB4sAXrdP0oq1. (2022) Study Survey [Unpublished Raw Data]; R\_33juBWjLGlkj8Up. (2022) Study Survey [Unpublished Raw Data].

<sup>463</sup> Interview with A.L., 2022. A.L. is a DAR member who pursued professional genealogical education after retirement and conducts workshops on professional genealogical practice.

challenge: without standardized academic credentials, genealogists lack the institutional markers that professionals in other fields use to signal competence to both peers and the public.

#### 6.1.4. Expertise Through Community Connections

The analysis of professional networks reveals how genealogical expertise develops through multi-tiered educational engagement that extends beyond local communities into national and international learning environments. Participants demonstrate strategic approaches to knowledge acquisition: 47% regularly attend webinars, 48% participate in lineage society meetings, 43% attend regional conferences, and 35% attend national conferences.<sup>464</sup> This pattern illustrates how genealogists combine various learning formats to enhance their expertise and build professional networks that support ongoing development (Figure 25).

Interview participant C.C., a DAR member and experienced genealogist with more than forty years of research experience, demonstrated the breadth of educational opportunities that dedicated researchers pursue: “I read the lectures I attend... I went to GRIP [the Genealogical Research Institute of Pittsburgh] a few weeks ago, law school for genealogists, that was enormously good fun. And I’m planning to go attend, um, the Salt Lake Institute [of Genealogy, SLIG] in January, all by Zoom. I’ve been to the National Genealogy Society conference twice.”<sup>465</sup> C.C.’s participation across GRIP, SLIG, and the National Genealogical Society (NGS) conference demonstrates how serious genealogists construct individualized curricula from available educational offerings, synthesizing knowledge across institutions rather than relying on any single program. Her attendance “all by Zoom” highlights how pandemic-era adaptations expanded access for practitioners who could not previously travel to in-person events.<sup>466</sup>

A correlation analysis between professional development engagement and genealogical expertise reveals a strong statistical relationship ( $r = 0.684$ ,  $p < 0.001$ ). Certified participants show significantly higher engagement rates across all learning modalities, particularly in

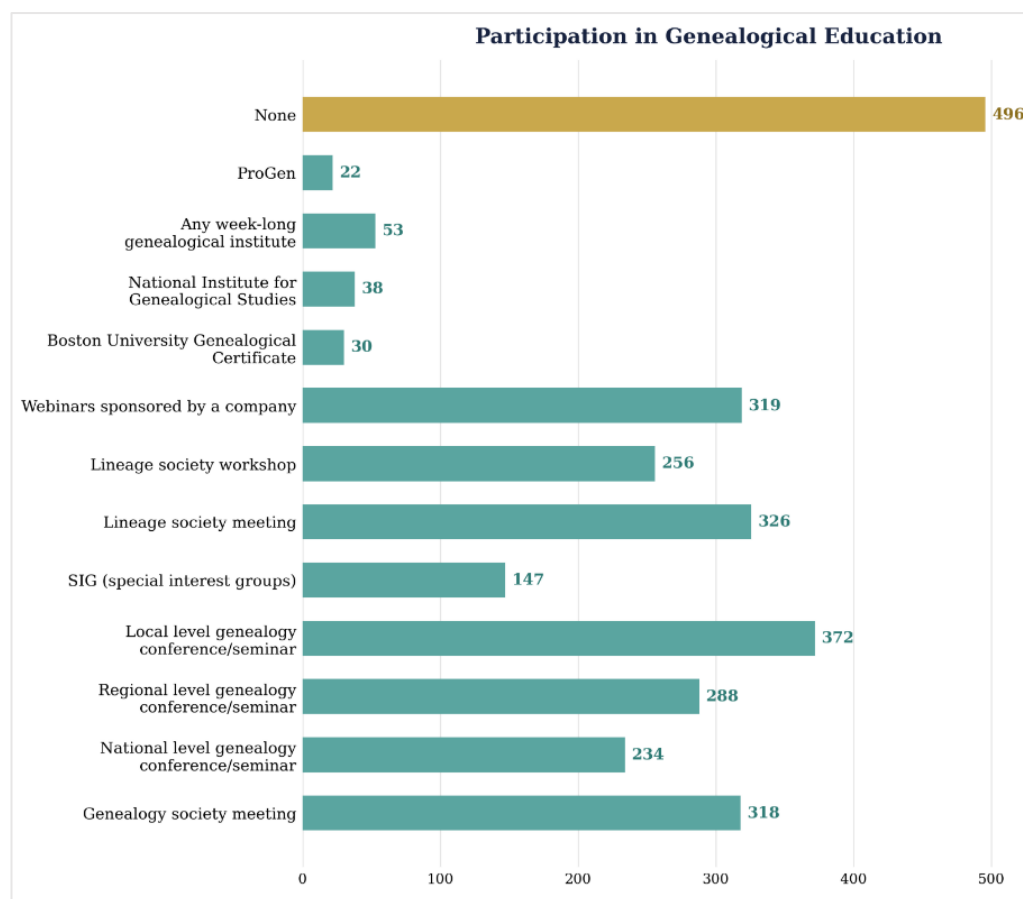
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<sup>464</sup> Survey data, 2022. Educational engagement patterns. For readers unfamiliar with these organizations: the Genealogical Research Institute of Pittsburgh (GRIP) offers week-long intensive courses on specialized genealogical topics; the Salt Lake Institute of Genealogy (SLIG) provides similar intensive programs held in Salt Lake City, Utah, home to the LDS Church’s Family History Library; the National Genealogical Society (NGS) hosts an annual conference that serves as the field’s largest gathering of practitioners, educators, and vendors. These institutions represent the primary continuing education infrastructure for genealogists in the United States, operating independently of the hereditary organizations examined in this study.

<sup>465</sup> C.C. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>466</sup> C.C.’s extensive educational engagement—encompassing prestigious institutes, specialized programs, and national conferences—exemplifies the multi-tiered approach to professional development that the survey data identify as common among the most committed practitioners. The breadth of her participation across GRIP, SLIG, and the NGS conference demonstrates how serious genealogists construct individualized curricula from available educational offerings, synthesizing knowledge across institutions rather than relying on any single program.

national conference attendance (83.3% vs. 18.2%,  $\chi^2 = 42.86$ ,  $p < 0.001$ ) and use of society applications for research (88.9% vs. 36.7%,  $\chi^2 = 38.24$ ,  $p < 0.001$ ).<sup>467</sup> These patterns confirm that professional recognition correlates with engagement across multiple educational channels rather than reliance on a single source of knowledge development.

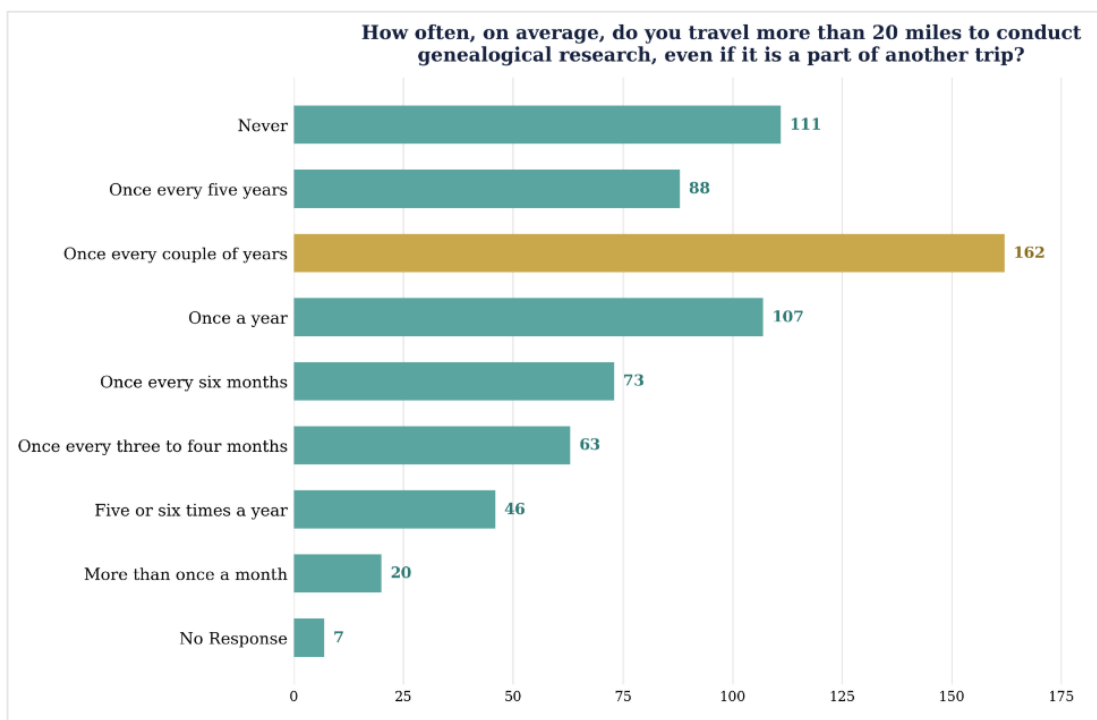


**Figure 25:** Participation in genealogical education activities among survey respondents ( $n = 1,164$ ). Respondents could select multiple options. Local level genealogy conferences and seminars attracted the highest participation ( $n = 372$ ), followed by lineage society meetings ( $n = 326$ ), company-sponsored webinars ( $n = 319$ ), and genealogy society meetings ( $n = 318$ ). Formal academic programs attracted comparatively modest participation: Boston University's Genealogical Certificate program ( $n = 30$ ), the National Institute for Genealogical Studies ( $n = 38$ ), week-long genealogical institutes such as GRIP and SLIG ( $n = 53$ ), and ProGen ( $n = 22$ ). Despite the breadth of available options, 496 respondents (42.6%) reported participation in none of the listed activities, suggesting that a substantial portion of the hereditary organization subculture engages with genealogical education outside the formal continuing education infrastructure, or not at all.

The geographical dimension of genealogical research reveals how professional development intersects with practical research constraints. Most researchers conduct their research within twenty miles of their homes, suggesting a reliance on digital resources or occasional long-distance research expeditions, as shown in Figure 26. Interview participant L.H., a genealogist

<sup>467</sup> Survey data, 2022. Correlation analysis between professional development engagement and genealogical expertise,  $r = 0.684$ ,  $p < 0.001$ .

who has worked with but not formally joined hereditary organizations, captured this tension: “There are so many untapped libraries and archives and repositories... I would love to go to all these libraries, but it’s expensive.”<sup>468</sup> L.H.’s longing for inaccessible archival resources illustrates how economic barriers constrain not merely research outputs but also the development of expertise itself.



**Figure 26:** Frequency with which survey respondents travel more than twenty miles to conduct genealogical research (n = 1,164). The most common response was once every couple of years (n = 162), while 111 respondents (9.5%) reported never traveling more than twenty miles for research purposes. Combined, these two categories account for nearly a quarter of all respondents, indicating that the majority of genealogical research within the hereditary organization subculture is conducted locally or through digital resources rather than through regular long-distance archival travel. Only 20 respondents (1.7%) travel for research more than once a month. These patterns reflect the economic and geographic barriers to archival access documented in this section, and align with Hjørthén's critique of democratization narratives that obscure persistent structural inequalities in practitioner access to primary source repositories.

This geographic and economic stratification of archival access creates structural advantages for practitioners near major repositories or with resources to travel, perpetuating expertise inequalities that narratives of digital democratization can obscure.<sup>469</sup> Within the hereditary organization subculture, these access disparities carry direct consequences: the documentary evidence required for lineage verification is not uniformly accessible, meaning that a researcher’s proximity to relevant archives, or financial capacity to travel to them, can

<sup>468</sup> L.H. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>469</sup> Hjørthén *op. cit.* Hjørthén argues that narratives of genealogical “democratization” through technology obscure persistent structural inequalities in access and participation.

determine whether a lineage application succeeds or stalls. This dynamic reinforces a point established in previous chapters: the hereditary organization subculture operates within documentary constraints that affect practitioners unequally, and the expertise required to navigate those constraints develops through pathways that are themselves shaped by economic and geographic privilege.

## **6.2. Integrating Old and New into Genealogical Practice**

Contemporary genealogical practice requires practitioners to navigate between documentary methods refined over centuries and technological innovations that have transformed the field within a single generation. Paper records share space with DNA testing kits. Professional genealogists make daily choices about when to trust a faded census record, when to order a genetic test, and how to reconcile the two when they tell different stories. This integration of traditional and emerging methodologies is not merely changing how genealogists work; it is reshaping what it means to verify lineage and, within the hereditary organization subculture specifically, challenging established definitions of family and membership eligibility. This section examines how genealogists within this subculture are creating new methodological frameworks that draw on both archival tradition and scientific innovation, and how those frameworks differ from those employed in other genealogical communities.

### **6.2.1. The Power of Traditional Methods**

Survey data reveal fundamental distinctions between professional genealogists and hobbyist researchers in their approaches to verification, documentation, and methodological integration, shown in Figure 27. Professional genealogists demonstrate a higher commitment to comprehensive documentation, with 98.2% employing traditional documentation methods compared with 90.0% among hobbyists.<sup>470</sup> This difference reflects not merely procedural preference but a deeper engagement with archival sources and adherence to primary documentation standards that characterize professional genealogical practice within the hereditary organization ecosystem. C.C., a DAR member with more than forty years of genealogical research experience, pointed to the transformation wrought by digitization: “Now

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<sup>470</sup> Survey data, 2022. Professional vs. hobbyist documentation rates. See Chapter 4 for full methodology. The categories “professional” and “hobbyist” reflect self-identification by survey participants; the boundary between these categories is fluid and contested within the genealogical community, as discussed in Section 6.1.1.

it is a whole lot easier to do solid research and primary sources than it was when I started 40 years ago. Right. When to research, you had to, you know, go places.”<sup>471</sup>

Research Practice	Professional Genealogists	Hobbyist Researchers	Difference
Traditional documentation methods	98.2%	90.0%	+8.2 pp
DNA research integration	59.6%	40.0%	+19.6 pp
Hybrid methodological approaches	69.6%	35.0%	+34.6 pp
Active genealogical society membership	86.1%	58.2%	+27.9 pp
Updating prior applications to current standards	77.8%	42.3%	+35.5 pp

pp = percentage points. Professional genealogists defined as those earning income from genealogical work or holding recognised credentials.

**Figure 27:** Methodological practices among professional genealogists compared with hobbyist researchers, 2022 survey data. Professional genealogists consistently demonstrate higher rates of engagement across all five measured practices. The largest gaps appear in hybrid methodological approaches (34.6 percentage points) and updating prior lineage applications to current evidentiary standards (35.5 percentage points), reflecting the deeper institutional engagement and commitment to contemporary research standards that characterize professional practice within the hereditary organization subculture. Difference values represent percentage point gaps between the two groups.

C.C.’s comparative perspective demonstrates how practitioners who experienced pre-digital research understand technological change as fundamentally liberating. The elimination of mandatory travel removed genealogy’s primary barrier to entry, theoretically enabling anyone with internet access to conduct rigorous research regardless of geographic location. Yet this democratization narrative requires qualification: the primary sources C.C. references are increasingly behind subscription paywalls, and rigorous research still demands paleographic skills, historical context, and methodological training that digital access alone cannot provide.<sup>472</sup> The shift from physical to financial barriers did not eliminate but rather transformed the mechanisms through which access to genealogical resources is stratified.

The methodological sophistication of professional researchers extends beyond traditional approaches to encompass emerging technologies and verification frameworks. Professionals demonstrate higher rates of DNA research integration (59.6%) and hybrid methodological approaches (69.6%) compared to hobbyist researchers (40.0% and 35.0%, respectively).<sup>473</sup>

<sup>471</sup> C.C. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>472</sup> This transformation of access barriers is examined in detail in Chapter 3, Section 3.5, which traces the evolution from physical archives to digital platforms. As Hjorthén argues, narratives of genealogical “democratization” through technology can obscure persistent structural inequalities in access and participation. See Hjorthén *op. cit.*

<sup>473</sup> Survey data, 2022. Professional vs. hobbyist DNA integration and hybrid methodology rates.

Institutional engagement reinforces these distinctions, with professional researchers maintaining higher rates of active membership in genealogical societies and heritage organizations (86.1% compared to 58.2% among hobbyists) and demonstrating greater commitment to bringing prior applications up to contemporary requirements (77.8% vs. 42.3%).<sup>474</sup>

What scholars term “artifactual literacy,” the ability to analyze and interpret primary documents within their historical context, and “archival intelligence,” the conceptual knowledge of archival management, representation, and search query formulation necessary for effective primary source research, remain essential competencies that distinguish experienced practitioners from novice researchers.<sup>475</sup> Within the hereditary organization subculture, these competencies carry particular weight because lineage verification depends on the ability to evaluate original sources critically, contextualize historical documents within their archival ecosystems, and recognize both the strengths and limitations of the records available for different populations and time periods. The unequal availability of archival materials, as Chapter 5 termed “documentary privilege,” means that artifactual literacy alone cannot overcome structural gaps in the documentary record, with direct implications for who can successfully navigate the hereditary organization application process.

The challenges posed by digital tools to archival rigor are well-documented. As Chapter 3 examined in detail, the phenomenon of “genealojunk,” the propagation of unverified information through automated suggestion systems, represents a persistent threat to scholarly standards.<sup>476</sup> Despite these challenges, digital tools have not fundamentally altered the core principles of genealogical research: verifying relationships, evaluating sources, and constructing accurate lineages persist as essential tasks regardless of the medium.<sup>477</sup> Survey data confirm that professional practitioners use hybrid methodological approaches more frequently (69.6%) than hobbyist researchers (35.0%), suggesting that expertise develops through synthesis rather than exclusive reliance on either traditional or digital methods.<sup>478</sup>

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<sup>474</sup> Survey data, 2022. Institutional engagement among professional vs. hobbyist researchers.

<sup>475</sup> Willever-Farr and Forte *op. cit.* p. 481. Willever-Farr and Forte draw on the foundational work of Yakel, Elizabeth and Torres, Deborah A. (2003) AI: Archival Intelligence and User Expertise. *The American Archivist*. 66(1). pp. 51–78. <https://www.jstor.org/stable/40294217>; accessed 5 March 2021. Yakel and Torres define “artifactual literacy” as the practice of analyzing and interpreting primary documents within their historical context (p. 52) and “archival intelligence” as the conceptual knowledge of archival management, representation, and search query formulation necessary for effective primary source research (pp. 52–54).

<sup>476</sup> For the detailed history of digital genealogical tools, the phenomenon of “genealo-junk,” and the “poison ivy” / “poison leaves” metaphor for algorithmic suggestions on platforms like Ancestry.com, see Chapter 3, Section 3.5.3. The original terminology comes from Willever-Farr and Forte (2014) *op. cit.* p. 481.

<sup>477</sup> Hershkovitz. (2012) *op. cit.* p. 5. See also Cortada *op. cit.* p. 170. Both sources are discussed in Chapter 3, Section 3.6.

<sup>478</sup> McKay, Jack. *op. cit.* pp. 3–8. McKay’s observation is discussed in the context of genealogical computing history in Chapter 3, Section 3.5.1.

### 6.2.2. DNA and Professional Standards

The integration of genetic genealogy represents one of the most significant transformations in contemporary genealogical practice. A.L. described the professional perspective succinctly: “DNA’s just another kind of evidence that we work with. I mean, it’s an unusual kind of evidence, and it’s a kind of evidence that requires a fair bit of specialized knowledge to employ it, but it’s still just a piece of evidence.”<sup>479</sup> A.L.’s pragmatic characterization integrates genetic genealogy into established evidentiary frameworks rather than treating it as a revolutionary methodology. However, her acknowledgment that DNA “requires a fair bit of specialized knowledge” highlights the expertise gap that explains hobbyist resistance: practitioners lacking genetic literacy may perceive DNA evidence as threatening precisely because they cannot independently evaluate its validity.

Survey data reveal that half of the participants (49%) advocate for the use of DNA under strict organizational guidelines, while smaller proportions support unrestricted use (12%) or oppose integration entirely (15%). Notably, 16% report insufficient knowledge to form definitive opinions, indicating ongoing educational needs regarding the applications and limitations of genetic genealogy.<sup>480</sup> Professional practitioners demonstrate markedly higher rates of full support for DNA evidence (59.6%) compared to hobbyist researchers (40.0%), suggesting a deeper understanding of the role of genetic evidence within comprehensive genealogical methodology. As Figure 28 demonstrates, this professional-hobbyist divide extends beyond simple acceptance to encompass fundamental differences in methodological integration.<sup>481</sup>

Both the NSDAR and GSMD have cautiously adopted DNA technology, showing adaptation to emerging science while maintaining their commitment to rigorous documentation standards. NSDAR began accepting DNA evidence for applications in 2014, with the first successful DNA-supported application accepted in 2016. GSMD pioneered the use of DNA testing as a research tool in 2001 through a partnership with Oxford Ancestors, potentially becoming the first major American lineage society to employ genetic science for historical verification, with formal DNA policy adoption following in 2016.<sup>482</sup> The evolution of these policies and their implications for organizational practice are examined in detail in their respective case study chapters (Chapters 8 and 9).

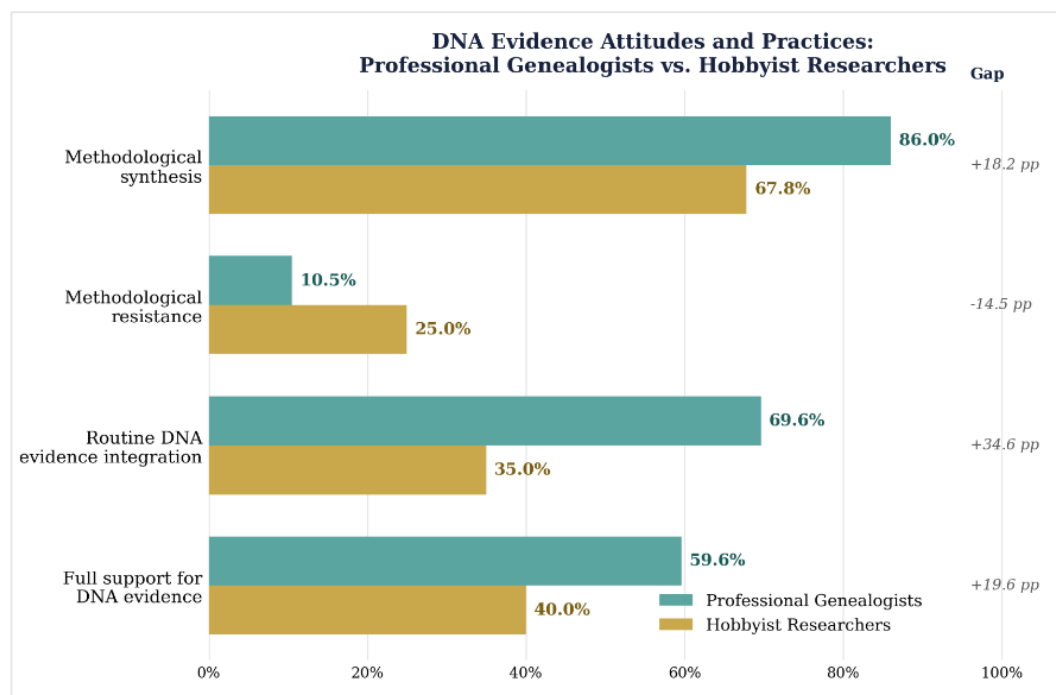
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<sup>479</sup> A.L. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>480</sup> Survey data, 2022. DNA attitude data. See Chapter 4 for full survey methodology.

<sup>481</sup> Survey data, 2022. DNA integration attitudes among professional and hobbyist researchers. Statistical comparisons are shown in Figure 27.

<sup>482</sup> Zinck *op. cit.* Zinck documents that NSDAR began accepting yDNA evidence for applications in 2014, with the first successful DNA-supported application accepted in 2016. GSMD pioneered DNA testing as a research tool beginning in 2001 through a partnership with Oxford Ancestors, with formal policy adoption in 2016. Both organizations’ DNA policies are examined in detail in their respective case study chapters: Chapter 8 (NSDAR) and Chapter 9 (GSMD).



**Figure 28:** Attitudes toward and integration of DNA evidence among professional genealogists compared with hobbyist researchers, 2022 survey data. Professional genealogists demonstrate substantially higher rates of support and integration across all four measures. The largest gaps appear in routine DNA evidence integration (34.6 percentage points) and methodological resistance, where hobbyist researchers are more than twice as likely to resist DNA incorporation (25.0% vs. 10.5%). Methodological synthesis — the integration of traditional documentary and genetic evidence within a single research approach — is common among professionals (86.0%) but less so among hobbyists (67.8%). Gap values represent percentage point differences between the two groups. Both the NSDAR and GSMD formally adopted DNA evidence policies in 2016; their policies are examined in Chapters 8 and 9, respectively.

### 6.2.3. When Biology and Family Diverge

The integration of genetic genealogy has created both opportunities and challenges in addressing historical documentation gaps, especially in cases involving adoption, illegitimate births, and enslaved ancestry research. Survey participants emphasize the supplementary nature of genetic evidence. One participant noted, “If carefully used, DNA can and does complement standard research techniques. Its use should be welcomed by genealogists and heritage groups,”<sup>483</sup> reflecting the emerging consensus that genetic evidence functions as a complementary methodology rather than a replacement for documentary research.

Interview participant N.S., who has served in genealogical verification roles within multiple hereditary organizations, confirmed the institutional perspective: “I think that DNA can be

<sup>483</sup> R\_2SB2yDcB1QsZgFz. (2022) Study Survey [Unpublished Raw Data]

useful and should be used in some cases. I think for the close generations, like with people who are adopted,”<sup>484</sup> allowing individuals with unknown parentage to trace lineage through genetic matching. However, researchers acknowledge that the reliability of genetic evidence declines with increasing generational distance, necessitating a sophisticated understanding of both genetic science and traditional documentation methods.

The tension between traditional paper genealogy and genetic reality has profound implications for institutional policies and individual identity. One survey participant observed that traditional applications “do not allow for DNA, children were born illegitimate, etc., so they may not be as accurate as you’d think.”<sup>485</sup> Another pointedly noted that illegitimate children “have existed as long as there has been sex. The admission process just proves a paper trail...nothing about actual parentage.”<sup>486</sup> These perspectives highlight growing recognition that documentary evidence may not accurately reflect biological relationships, challenging fundamental assumptions about lineage verification and family definition.<sup>487</sup>

The question of adopted children’s eligibility for membership in lineage societies represents a complex intersection of genetic science, institutional policy, and concepts of family identity. Many survey participants express support for inclusive approaches, with one noting, “With caveats. Inclusion, yes. Exclusion, no. An adopted child has as much right to be a member of any such society as a biological descendant.”<sup>488</sup> However, others maintain traditional perspectives. Interview participant B.H., a longtime hereditary organization member who has held state-level leadership positions, articulated the countervailing view: “To me, you know, inherently a lineage society is by blood relatives, not by adopted relatives...I think that potentially, if you went by adoption, if you allowed adoptees to follow their adoptive parents’ lineage, that will open up a can of worms.”<sup>489</sup> B.H.’s framing of expanded eligibility as opening “a can of worms” reveals fundamental assumptions underlying hereditary organization membership that genetic genealogy has complicated, suggesting anxiety about boundary maintenance: if organizations accept non-biological connections, where does inclusion end? The contrast with the survey participant who asserted adopted children’s “right to be a member” demonstrates that definitions of family remain actively contested within the hereditary organization subculture.

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<sup>484</sup> N.S. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>485</sup> R\_20NWkupYR2RFXg0. (2022) Study Survey [Unpublished Raw Data].

<sup>486</sup> R\_0k4gnnLaJxdgK1b. (2022) Study Survey [Unpublished Raw Data].

<sup>487</sup> For hereditary organizations that depend on documented biological descent as a membership criterion, this recognition creates a distinctive tension that does not arise in the same way for genealogical communities organized around other principles.

<sup>488</sup> R\_1luXUmHIkVhbBJW. (2022) Study Survey [Unpublished Raw Data].

<sup>489</sup> B.H. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

#### 6.2.4. The Definition of Family: Hereditary Organizations in Comparative Context

At the heart of these debates lies a fundamental question: how is the concept of family defined—and by whom? Traditional definitions of family have long recognized that emotional bonds and shared experiences, not just genetic connections, underpin family relationships. Writing in 1983, Walter Lee Sheppard Jr. argued that family includes those connected not by blood but through marriage and other bonds.<sup>490</sup> However, Sheppard’s observations predate the genomic revolution that began around 2000, and his framework cannot address the complex family negotiations that emerged in the 2010s and 2020s as DNA testing revealed biological relationships diverging from documentary family structures.

Contemporary understanding of family has expanded significantly beyond Sheppard’s framework. The concept of “chosen family,” relationships formed through bonds of affection, mutual support, and shared experience rather than biology or legal recognition, has gained increasing cultural acceptance, particularly among communities where biological family relationships may be complicated, absent, or harmful.<sup>491</sup> This evolution in how Americans conceptualize family creates tensions with hereditary organizations’ bloodline requirements, even as those organizations have worked to make their application processes as accessible as possible within their founding mandates.

DNA testing has further complicated these definitional questions by revealing biological relationships that contradict documentary records, effectively ending the possibility of confidential adoption and forcing both adoption agencies and hereditary organizations to navigate new territory where biological and legal family definitions diverge.<sup>492</sup>

A significant structural distinction emerges between hereditary organizations and other genealogical communities regarding how they conceptualize family relationships.<sup>493</sup> Hereditary organizations, by their founding mandates, typically reject proofs of adoption for membership while countenancing relatedness by marriage—accepting, for example, a spouse’s lineage for certain membership categories while requiring biological descent for others. This creates an

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<sup>490</sup> Sheppard (1983) *op. cit.* pp. 29–35. As noted in the chapter introduction, Sheppard published in 1983, decades before the “genomic age” began around 2000; his work is cited here for its historical articulation of expansive definitions of family within genealogical practice, not for commentary on post-2000 developments. See Section 6.0 introduction and Chapter 3, Section 3.8 for the genomic revolution’s impact on family definitions.

<sup>491</sup> The concept of “chosen family” has scholarly roots in Weston, Kath. (1991) *Families We Choose: Lesbians, Gays, Kinship*. New York: Columbia University Press. Weston documented how LGBTQ+ communities constructed kinship networks outside biological and legal frameworks, a concept that has since gained broader cultural acceptance. For the application of constructed kinship concepts to genealogical practice, see Carsten. *op. cit.*; Morgan (2021) *op. cit.* pp. 9–10; Zerubavel (2012) *op. cit.* pp. 9–15.

<sup>492</sup> Bahrapour, Tara. (2016) DNA’s New ‘Miracle’: How Adoptees Are Using Online Registries To Find Their Blood Relatives. *The Washington Post*. 12 October. <https://www.washingtonpost.com/> accessed 22 January 2024. The quote is from Janice Goldwater, founder and executive director of Adoptions Together. This source is also discussed in Chapter 3, Section 3.8.2.

<sup>493</sup> See also the chapter introduction (Section 6.0) and Chapter 1, Section 1.5, for the broader framing of hereditary organizations as a bounded subculture with distinctive membership criteria.

apparent paradox: a legal relationship formed by choice (marriage) can satisfy membership requirements, whereas another legal relationship formed by choice (adoption) cannot. The structural reason lies in these organizations' founding purposes as lineage societies, in which a documented biological connection to specific historical figures or events serves as the fundamental criterion for membership.

Professional genealogists and genealogical societies operating outside hereditary organizations' specific mandates think more expansively about relatedness based on choice or affinity. The Board for Certification of Genealogists (BCG) and similar professional bodies evaluate the quality of evidence and research methodology rather than prescribing which family relationships "count." Professional genealogists routinely research adoptive lineages, document chosen family relationships, and help clients understand complex family structures that include both biological and non-biological connections.

Contemporary hereditary organizations work within these structural constraints while seeking to be as fair and accessible as possible. Both the NSDAR and GSMD have undertaken efforts to streamline application processes, provide educational resources for prospective members, and ensure that qualified applicants are not deterred by procedural barriers. The challenge of proving lineage to specific Revolutionary-era or colonial-era ancestors remains structurally more difficult for some descendants than others, particularly descendants of enslaved people whose ancestors were systematically excluded from the documentary record, but this reflects historical documentation patterns rather than contemporary organizational intent to exclude.

The comparative perspectives developed in Chapters 1 and 3 reinforce this point. African American genealogical practice, as documented through the work of AAHGS and related organizations, has developed more expansive approaches to family documentation, incorporating oral histories and community memory alongside documentary sources, with DNA testing providing the only means of tracing biological ancestry across the documentary gap created by slavery for many families.<sup>494</sup> The key distinction lies not in which approach is "correct" but in recognizing that different genealogical communities serve different purposes and deploy different evidentiary standards appropriate to those purposes.

Survey data support this interpretation, with professional practitioners demonstrating both higher rates of DNA research integration (59.6% compared to 40.0% among hobbyists) and more sophisticated approaches to synthesizing multiple lines of evidence.<sup>495</sup> These methodological debates about evidence types, family definitions, and verification standards

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<sup>494</sup> For the full history of AAHGS, the "brick wall" of 1870, and the specialized methodologies developed by African American genealogists, see Chapter 3, Section 3.7.2. Key sources include Louis-Jacques *op.cit.*; Kearns *op.cit.* For DNA's particular significance in African American genealogy, see Nelson *op.cit.*

<sup>495</sup> Survey data, 2022. Professional vs. hobbyist DNA integration rates.

raise broader questions about genealogy's disciplinary identity. Questions that are examined in the following section.

### 6.3. Is Genealogy History's Child or Its Sibling?

The question of whether genealogy constitutes a subset of historical inquiry or an autonomous discipline carries implications that extend beyond academic classification. How this question is answered affects university curriculum design, grant eligibility, journal publication standards, professional credentialing, and the institutional legitimacy accorded to genealogical expertise.<sup>496</sup> For the hereditary organization subculture specifically, the disciplinary status of genealogy shapes whether the verification processes that organizations like the NSDAR and GSMD employ are understood as rigorous scholarly practice or as merely institutional gatekeeping. The question, therefore, intersects directly with the broader thesis argument about how hereditary organizations function within the genealogical ecosystem.

Survey data reveal that the genealogical community remains deeply divided on this fundamental question of identity (Figure 29). Among the 1,157 participants who responded, 62.0% (722) view genealogy as a subset of historical inquiry, whereas 33.5% (390) advocate recognition as an autonomous field.<sup>497</sup> What makes this division particularly revealing is how educational background shapes perspective: advanced-degree holders are approximately five times more likely to support genealogy's disciplinary independence than those without advanced degrees.<sup>498</sup> This pattern suggests that participants with greater exposure to how academic disciplines develop, establish boundaries, and claim intellectual territory recognize that genealogy synthesizes approaches from history, anthropology, genetics, and sociology into a methodologically distinctive approach.

T.R., a Sons of the American Revolution member, officer, and professional genealogist, articulated the frustration that many practitioners feel about genealogy's institutional status: "I think this should be a serious discipline and it should be treated as a serious discipline...I think the stereotype is that it's still just old ladies and, uh, who just want to give their grandchildren a

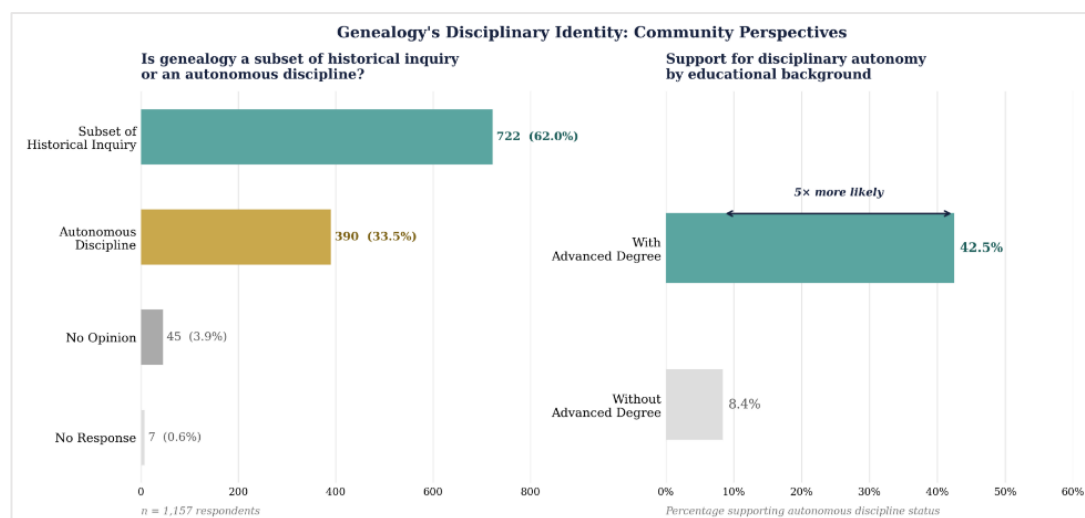
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<sup>496</sup> The historiographic relationship between genealogy and history is examined in Chapter 2, Section 2.1, which traces the separation of genealogical and historical practice from the late nineteenth century onward. See Martin *op.cit* and O'Hare *op.cit*.

<sup>497</sup> Survey data, 2022. Disciplinary identity question (Q16): 722 participants (62.0%) selected "subset of history"; 390 participants (33.5%) selected "standalone"; 45 participants (3.9%) selected "no opinion"; 7 participants (0.6%) did not respond. See Chapter 4 for full methodology.

<sup>498</sup> The "five times more likely" comparison reflects the difference between 42.5% of advanced-degree holders supporting disciplinary independence versus 8.4% among those with basic education, as detailed in Section 6.3.3.

thing about their family tree.”<sup>499</sup> T.R.’s frustration reflects concerns shared by the 33.5% of survey participants who advocated for disciplinary autonomy, and connects directly to the certification discussion in Section 6.1.3: formal credentials gain value when the field that confers them possesses institutional legitimacy.<sup>500</sup>



**Figure 29:** Survey respondents' views on genealogy's disciplinary status, and the effect of educational background on support for disciplinary autonomy (n = 1,157). Left panel: the majority of respondents (62.0%, n = 722) view genealogy as a subset of historical inquiry, while 33.5% (n = 390) advocate recognition as an autonomous discipline. Right panel: support for disciplinary autonomy is strongly associated with educational background — advanced-degree holders are approximately five times more likely to support disciplinary independence (42.5%) than those without advanced degrees (8.4%), suggesting that greater familiarity with how academic disciplines establish boundaries and claim intellectual territory shapes practitioners' views on genealogy's institutional status. Survey data, 2022.

### 6.3.1. Genealogy's Place in the Historical Hierarchy

Among participants who position genealogy as a subset of history, the relationship between historical context and genealogical understanding emerges as paramount, with 86.7% of subset proponents emphasizing this connection.<sup>501</sup> One participant articulated this perspective: “Proper analysis of documentation & research options for genealogy are rooted in relevant legal and social histories.”<sup>502</sup> Another emphasized fundamental inseparability: “You can’t study your family history without involving history.”<sup>503</sup> These perspectives suggest that historical

<sup>499</sup> T.R. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom. The full interview context includes T.R.’s observation that BCG and APG are aware of genealogy’s status issues and are attempting to address them, but he expressed uncertainty about whether lineage societies help or hinder this effort.

<sup>500</sup> The certification gap (5% achieved vs. 49% interested) is documented in Section 6.1.3. Mills argues that genealogy’s “skills, knowledge base, analytical principles, and evidentiary standards are not obtainable through any [one] traditional academic program,” highlighting the structural disconnect between academic institutions and genealogical expertise. Mills (2002) *op. cit.*

<sup>501</sup> Survey data, 2022. Reasons for viewing genealogy as a subset of history (Q17). Among subset proponents, 86.7% emphasized the relationship between historical context and genealogical understanding.

<sup>502</sup> R\_3EEiJ0sCTLVoBPO. (2022) Study Survey [Unpublished Raw Data].

<sup>503</sup> R\_3ncKBJ2JoP6KwQ3. (2022) Study Survey [Unpublished Raw Data].

knowledge provides essential interpretive frameworks for understanding genealogical evidence within broader social, political, and economic contexts, a point with direct relevance for the hereditary organization subculture, where lineage verification requires placing individual ancestors within the specific historical circumstances of the American Revolution, the colonial period, or the Mayflower voyage.

The emphasis on shared methodological approaches (56.9% among subset proponents) indicates recognition of common research practices between genealogy and history.<sup>504</sup> One participant observed that “individual stories combine to make up historical trends. Historical events are made up of individual perspectives and experiences.”<sup>505</sup> This perspective offers an understanding of how genealogical research contributes to historical knowledge by documenting individual experiences within larger social patterns, precisely the kind of microhistorical contribution that hereditary organizations’ membership records represent, even if those organizations do not conceptualize their archives in these terms.

### **6.3.2. The Case for Disciplinary Sovereignty**

Advocates of genealogy’s disciplinary autonomy present sophisticated arguments that acknowledge both its connections to and its independence from traditional historical scholarship. The relationship to multiple disciplines (cited by 72.3% of autonomy proponents) is a prominent feature of these perspectives.<sup>506</sup> One participant noted, “Many genealogists have little interest in general history, only their family’s history.”<sup>507</sup> This observation suggests that genealogical practice may serve fundamentally different purposes and employ distinct methodological approaches from academic history, warranting recognition as an independent field of inquiry.

Other participants articulated views that acknowledge both connection and autonomy. One reflected, “I don’t think you can understand genealogy without understanding history, but I also don’t think you can understand history without at least a tenuous grasp of genealogy.”<sup>508</sup> Another observed that “while there is an academic subset to genealogy, most genealogists are hobbyists and do not adhere to accepted historiographical standards.” This observation highlights the complex relationship between amateur and professional practice that shapes disciplinary conceptualization, and that has particular salience within the hereditary

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<sup>504</sup> Survey data, 2022. Shared methodological approaches recognized by 56.9% of subset proponents.

<sup>505</sup> R\_2D6PAVZ0Xn8y6E2. (2022) Study Survey [Unpublished Raw Data].

<sup>506</sup> Survey data, 2022. Among autonomy proponents, 72.3% cited genealogy’s relationship to multiple disciplines as a reason for recognizing it as independent from history alone.

<sup>507</sup> R\_2WPBP9xboCPQAs7. (2022) Study Survey [Unpublished Raw Data].

<sup>508</sup> R\_UW9N3MR480OgO9r. (2022) Study Survey [Unpublished Raw Data].

organization subculture, where hobbyist applicants must meet verification standards developed by professional genealogists.

One particularly thoughtful response positioned genealogy as offering distinctive approaches to historical understanding: “Micro/macro, for every historical fact or story, there’s a human element that can be explored through a genealogical lens. Understanding history is important for genealogy, but it’s not the generic history you learned in class. Genealogy can be a custom history class unique to the user for those that choose to.”<sup>509</sup> This characterization of genealogy as “a custom history class” resonates with how hereditary organization members describe their own research journeys: the personal motivation of proving lineage becomes a vehicle for historical engagement that academic history departments rarely replicate.

### **6.3.3. Academic Educational Perspectives**

The relationship between advanced academic qualifications and disciplinary perspectives reveals complex epistemological patterns.<sup>510</sup> Advanced-degree holders view genealogy notably differently from those with basic educational backgrounds: 55.8% of advanced-degree holders view genealogy as a subset of historical inquiry, compared with 88.2% among those without advanced degrees.<sup>511</sup> This disparity suggests that academic training fosters a more nuanced understanding of disciplinary boundaries. Advanced-degree holders, having witnessed how disciplines such as environmental studies, gender studies, and digital humanities emerged from existing fields, may be more inclined to recognize genealogy’s potential for similar institutional development.

Recognition of genealogy as a standalone discipline varies correspondingly across educational levels, with 42.5% of advanced-degree holders supporting disciplinary independence compared with 8.4% of those with basic education.<sup>512</sup> Methodological perspectives reveal further complexity: advanced-degree holders demonstrate lower rates of shared-methodology recognition (44.8% compared with 65.5% among basic-education holders), reflecting greater awareness that genealogical research employs analytical techniques, from genetic evidence

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<sup>509</sup> R\_1Q5DMZOpnKcR82k. (2022) Study Survey [Unpublished Raw Data].

<sup>510</sup> Survey data, 2022. Educational background cross-tabulation with disciplinary identity question.

<sup>511</sup> Survey data, 2022. The disparity between advanced-degree holders (55.8%) and basic-education respondents (88.2%) viewing genealogy as a subset of history is statistically significant. Advanced-degree holders include participants with master’s degrees, doctoral degrees, and professional degrees (J.D., M.D., etc.) regardless of discipline.

<sup>512</sup> Survey data, 2022. Support for disciplinary independence: 42.5% among advanced-degree holders vs. 8.4% among basic-education holders. See Figure 23.

evaluation to paleographic analysis to the Genealogical Proof Standard, that have no direct equivalent in mainstream historical methodology.<sup>513</sup>

These varying perspectives reflect tensions between professional and amateur practice, traditional and innovative methodologies, and institutional and individual priorities. For the hereditary organization subculture, the disciplinary question has immediate practical implications: it shapes how organizations justify their verification standards, develop training programs for volunteer genealogists, and how the broader scholarly community evaluates the evidentiary rigor of lineage documentation.<sup>514</sup>

#### **6.4. The Hereditary Organization Subculture in Transition**

The patterns documented throughout this chapter, the gap between certification interest and achievement, the professional-hobbyist divide in methodological sophistication, the contested disciplinary identity of genealogy, and the divergent approaches to DNA evidence and family definitions, converge to reveal a genealogical subculture navigating significant transitions. The hereditary organization ecosystem sits at the intersection of several of these tensions, and the survey and interview data provide empirical evidence for understanding how these dynamics shape institutional practice.

The substantial gap between interest in professional certification (49%) and actual achievement (5%), documented in Section 6.1.3, is particularly significant in the hereditary organization context.<sup>515</sup> Hereditary organizations depend on the expertise of volunteer genealogists who review membership applications, evaluate documentary evidence, and render judgments about lineage validity. The finding that over 90% of non-professional practitioners self-identify as intermediate or advanced despite limited formal credentials suggests that the hereditary organization subculture has developed effective informal mechanisms for cultivating genealogical competence, local genealogical societies, peer mentorship networks, and organizational workshops that collectively function as a parallel educational infrastructure. Yet the absence of formal credentialing for these volunteer reviewers raises questions about the

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<sup>513</sup> Survey data, 2022. Shared methodology recognition: 44.8% among advanced-degree holders vs. 65.5% among basic-education holders.

<sup>514</sup> This question has practical relevance for the hereditary organization subculture. As Chapter 2 documented, the professionalization of historical scholarship in the late nineteenth century coincided with the founding of many hereditary organizations, creating an enduring tension between academic history and the genealogical practices on which lineage verification depends. Whether genealogy achieves autonomous academic recognition affects the institutional legitimacy of the verification standards that hereditary organizations employ.

<sup>515</sup> Survey data, 2022. Certification interest (49%) vs. achievement (5%), as reported in Section 6.1.3. Self-identification data (over 90% intermediate or advanced) from Section 6.1.1.

consistency and rigor of application review across different chapters and state societies, a tension that emerges in the case study evidence examined in Chapters 8 and 9.

The professional-hobbyist divide in methodological sophistication, spanning documentation practices, DNA integration, hybrid approaches, and institutional engagement, demonstrates that the hereditary organization subculture contains practitioners operating at markedly different levels of research competence.<sup>516</sup> The strong correlation between professional development engagement and research sophistication ( $r = 0.684$ ,  $p < 0.001$ ) suggests that this divide is not fixed but responsive to educational investment.<sup>517</sup> The finding that different educational backgrounds contribute distinct strengths, with advanced-degree holders demonstrating higher engagement with traditional methods, while those with basic education show slightly higher DNA adoption rates, indicates that genealogical expertise develops through multiple trajectories that a single credentialing pathway could not adequately capture.<sup>518</sup>

Geographic and economic constraints further shape how practitioners within the hereditary organization subculture access resources necessary for genealogical research and organizational participation.<sup>519</sup> These constraints affect not only individual research capacity but also the representativeness of organizational membership. As Chapter 5 documented, the ethnic concentration within the hereditary organization subculture reflects historical documentation patterns and institutional origins rather than a lack of genealogical interest among non-white Americans. When most practitioners conduct research within twenty miles of their homes, the location of ancestral records relative to current residence becomes a significant factor in whether lineage can be documented to the standards hereditary organizations require.

The disciplinary identity debate examined in Section 6.3 intersects with these practical challenges. Despite the few formal academic programs, most notably the University of Strathclyde's postgraduate programs and Brigham Young University's family history offerings, genealogical training remains overwhelmingly informal.<sup>520</sup> For the hereditary organization subculture, this informality has both advantages (accessibility, flexibility, responsiveness to

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<sup>516</sup> Survey data, 2022. Professional vs. hobbyist rates from Section 6.2.1: documentation methods (98.2% vs. 90.0%), hybrid approaches (69.6% vs. 35.0%), DNA integration (59.6% vs. 40.0%), and institutional engagement (86.1% vs. 58.2%).

<sup>517</sup> Survey data, 2022. Correlation between professional development engagement and research sophistication ( $r = 0.684$ ,  $p < 0.001$ ), as discussed in Section 6.1.2.

<sup>518</sup> Survey data, 2022. Educational backgrounds: advanced degree holders show higher engagement with traditional methods (95.3% vs. 85.3%) while those with basic education demonstrate slightly higher DNA adoption rates (20.2% vs. 17.0%). See Section 6.4.

<sup>519</sup> For geographic constraints on research access (most practitioners working within twenty miles of home), see Section 6.1.4. For economic barriers to participation, see Chapter 5, Section 5.2.2.

<sup>520</sup> Durie, Bruce. (2017) *What is Genealogy? Philosophy, Education, Motivations, and Future Prospects*. *Genealogy*. 1(4). p. 1. doi:10.3390/genealogy1010004; accessed 21 January 2021. Durie notes that "worldwide hardly any academics" have genealogy as their primary research, teaching, and writing function, and that genealogy "has not yet achieved the status of a discipline." The University of Strathclyde's postgraduate programs in genealogical studies represent one of the few formal academic pathways, alongside Brigham Young University's family history programs. See also Jones, Thomas W. and Sanborn, Melinde Lutz. (2010) Editors' Corner: Genealogy as Academic Discipline. *National Genealogical Society Quarterly*. March. 98(1). p. 3.

community needs) and disadvantages (inconsistency, lack of standardization, difficulty in evaluating competence). The tension between maintaining genealogy's traditional accessibility and developing more rigorous professional standards mirrors the broader paradox that characterizes hereditary organizations themselves: the coexistence of democratic rhetorical commitments with institutional structures that, by design, limit participation to those who can demonstrate documented biological descent from specific historical populations.

Rhoads's characterization of genealogy as "the democratic impulse in the study of history" captures the aspiration that genealogical practice makes historical inquiry accessible through personal ancestry.<sup>521</sup> Yet the survey data examined in this chapter reveal that this democratic impulse operates within significant constraints: financial barriers, geographic limitations, documentary privilege, and the expertise gap between professional and hobbyist practitioners. Within the hereditary organization subculture, these constraints are amplified by the specific requirements of lineage verification, which demand access to records that may be geographically dispersed, behind institutional paywalls, or systematically absent from the documentary record.

Hershkovitz's taxonomy positions genealogy as spanning 45 separate research disciplines, providing a framework for the interdisciplinary expertise that hereditary organization practitioners deploy.<sup>522</sup> Whether this synthesis constitutes a discipline in its own right or remains classified as an applied subset of history, the practical demands on practitioners within the hereditary organization subculture remain the same. The implications of these patterns for institutional culture, membership experience, and organizational adaptation are examined in the case studies that follow.

## 6.5. Where Genealogical Identity Stands Today

This chapter has examined research practices and professional identity within the hereditary organization subculture, revealing a community characterized by sophisticated methodological diversity, complex pathways to expertise, and ongoing negotiations between traditional scholarship and technological innovation. Three principal findings emerge from the survey and interview data, each with direct implications for the case studies in subsequent chapters.

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<sup>521</sup> Rhoads (1971) *op. cit.* Rhoads served as the fourth Archivist of the United States (1968–1979). His characterization of genealogy as "the democratic impulse in the study of history" anticipated by half a century the democratization narratives that Hjorthén (2022) would later critique as potentially obscuring persistent structural inequalities in genealogical access.

<sup>522</sup> Hershkovitz (2012) *op. cit.* p. 5. Hershkovitz's taxonomy spanning 45 separate research disciplines is discussed in Chapter 2, Section 2.1.

First, the professional-hobbyist divide demonstrates that the hereditary organization subculture contains practitioners operating at significantly different levels of methodological sophistication, yet without the formal credentialing infrastructure that might standardize practice. The strong correlation between professional development engagement and research sophistication ( $r = 0.684$ ,  $p < 0.001$ ) suggests that this divide is responsive to educational investment rather than reflecting fixed categories. Hereditary organizations depend on the expertise of both professional and hobbyist practitioners, whether as application reviewers, chapter-level volunteers, or individual applicants navigating the lineage verification process. The patterns documented here provide the context for understanding the verification practices, institutional standards, and organizational cultures examined in the NSDAR and GSMD case studies (Chapters 8 and 9).

Second, the integration of genetic genealogy has challenged traditional documentary verification while creating opportunities for hybrid evidence systems. The marked differences in DNA acceptance between professionals and hobbyists reflect fundamentally different understandings of how genetic evidence functions within comprehensive genealogical frameworks. Both the NSDAR and GSMD have navigated this transformation cautiously, adopting DNA evidence under structured guidelines that maintain documentary standards while accommodating scientific innovation.

Third, the adoption and relatedness analysis in Section 6.2.3 illuminates a key distinction between the hereditary organization subculture and other genealogical communities. Hereditary organizations maintain bloodline-based membership requirements that, by design, exclude relationships formed through adoption while accepting relationships formed through marriage, a structural distinction rooted in their founding purposes as lineage societies rather than in contemporary exclusionary intent. Professional genealogists and genealogical societies operating outside these mandates think more expansively about family relationships, evaluating the quality of evidence rather than prescribing which connections count. This distinction does not render either approach inherently superior; rather, it demonstrates that different genealogical subcultures serve different purposes and deploy different evidentiary standards appropriate to those purposes.<sup>523</sup>

The contested disciplinary identity of genealogy (62.0% viewing it as a subset of history, 33.5% advocating autonomy) underscores this broader challenge. Hereditary organizations have built their own verification infrastructure to compensate for the field's lack of formal academic institutions, developing application review processes, documentation standards, and genealogical libraries that function as parallel scholarly institutions. Whether these adaptations

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<sup>523</sup> For the full comparative analysis of genealogical subcultures, see Chapter 1, Section 1.5, and Chapter 3, Section 3.7.2.

represent rigorous genealogical practice or exclusionary gatekeeping, or, as the evidence suggests, elements of both, depends on the analytical framework through which they are examined. Chapter 7 turns to these questions, examining the motivations, obstacles, and institutional dynamics that characterize the relationship between practitioners and the organizations through which they pursue documented connections to the American past.

## Chapter 7 The Price of Belonging

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This chapter examines institutional engagement patterns within hereditary organizations by exploring how individual motivations intersect with organizational structures, how various barriers compound to limit participation, and how these organizations adapt their practices to serve evolving membership needs. A central tension animates any examination of American hereditary organizations: how can institutions predicated on exclusive membership criteria claim a democratic identity? This apparent paradox troubled contemporaries from the founding of these organizations. As Teachout documents, hereditary societies “had somehow to reconcile the values of genealogy with those of democracy. Genealogy implied a world characterized by natural hierarchy, a paradigm which contrasted sharply with the social paradigm underlying democratic ideas.”<sup>524</sup> Critics in the late nineteenth century viewed these organizations with “undisguised antipathy and suspicion,” particularly in cities with large immigrant populations where genealogical requirements seemed fundamentally un-American.<sup>525</sup>

The resolution to this paradox lies in distinguishing between two meanings of “democratic.” Hereditary organizations operate democratically *within* their bounded membership through voting, elections, chapter autonomy, and participatory governance. Members elect leadership at local, state, and national levels; chapters exercise considerable autonomy in programming and activities; organizational policies emerge through representative processes. This internal democracy, however, operates within membership boundaries established by genealogical criteria rather than open admission. As the societies themselves contended in response to nineteenth-century criticism, “they were essentially democratic in nature,” insisting “that their organizations were not organized to mark social differences” but rather to honor shared historical heritage.<sup>526</sup>

This distinction parallels other membership organizations that combine entry criteria with internal democratic governance. Professional associations require credentials; labor unions organize specific industries; religious congregations may require doctrinal adherence. The hereditary requirement functions similarly: it establishes who belongs to the community rather than how that community governs itself. The challenge lies not in the existence of membership criteria but in ensuring those criteria do not become proxies for discrimination based on characteristics unrelated to documented lineage. Survey and interview data suggest

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<sup>524</sup> Teachout *op. cit.* p. 128.

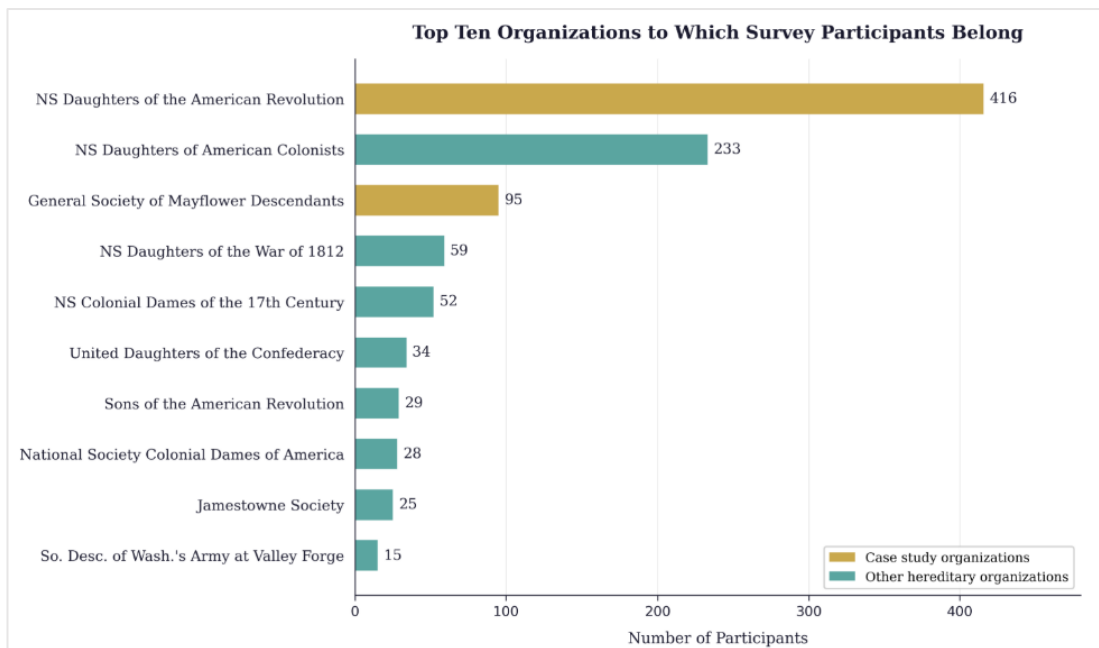
<sup>525</sup> Teachout. *op. cit.* p. 128.

<sup>526</sup> Teachout. *op. cit.* p. 129.

contemporary members understand this distinction. Interview participant JD captured this perspective: “People said, well, why would you want to do that? Well, you do, because you can... I like the idea that I can contribute to my community through my time and my volunteerism.”<sup>527</sup> The subsequent analysis examines where this ideal is achieved and where practice falls short.

### 7.1. Motivations and Memberships: Decoding the Drive to Join

The largest cohort of survey participants, 971 individuals, representing 83.4% of those surveyed, identified as members of lineage societies.<sup>528</sup> As shown in Figure 30, the NSDAR and GSMD are the first- and third-most-represented organizations among participants, confirming their selection as case studies, while the overall diversity of organizational affiliations demonstrates the breadth of heritage institutions serving genealogical communities.



**Figure 30:** Top ten hereditary organizations by survey participant membership ( $n = 971$  members, representing 83.4% of all survey participants). The National Society Daughters of the American Revolution (NSDAR,  $n = 416$ ) and the General Society of Mayflower Descendants (GSMD,  $n = 95$ ), highlighted in gold, rank first and third, respectively, among organizations represented in this study, confirming their selection as case studies. The breadth of organizational affiliations across the remaining eight societies demonstrates the diversity of heritage institutions serving the genealogical communities from which this survey drew its sample. A complete list of lineage society memberships held by participants is provided in Appendix 8.

<sup>527</sup> JD. (2022) Interviewed by S. Combs-Bennett. 21 July. Zoom.

<sup>528</sup> De Groot (2020) *op. cit.* p. 27. Lineage societies and heritage organizations serve as repositories of genealogical documentation, communities of shared historical interest, and gatekeepers of ancestral recognition within the genealogical landscape.

The pathways to membership reveal motivations that extend beyond simple lineage verification to encompass family legacy, personal validation, and community engagement. Family connection emerges as the primary driver, cited by 37.9% of participants as their main reason for joining, a figure that reflects the role of intergenerational knowledge transmission in sustaining these institutions. ME exemplifies this group: “I actually am a fifth-generation DAR member, and I joined in my twenties, really to honor my great-grandmother.”<sup>529</sup> For ME, membership is not primarily about ancestral recognition but about participating in a family tradition that connects living members to deceased ones through a shared institutional identity. The second most common motivation, verifying genealogical research (29.7%), indicates that these organizations serve as validation mechanisms for individual research efforts, providing institutional authority that reinforces personal genealogical accomplishments. GB represents this pathway: “I came to genealogy very late... I think primarily I was doing it for the cousins... just to see if I could qualify with my research.”<sup>530</sup> GB’s framing of membership as a test of genealogical competence positions the application process not as a gatekeeping obstacle but as a professional benchmark.

Social causes rank third among membership motivations (23.4%), indicating that these organizations function not only as historical societies but as active participants in contemporary community life. This finding challenges the stereotype of heritage organizations as purely retrospective institutions, revealing their role in connecting historical identity with present-day service and social engagement instead. JD’s statement captures this multifaceted appeal: “I like the idea that I can contribute to my community through my time and my volunteerism and... my dollars, what I support and, the general service, community service and through my veteran’s programs that our chapter supports.”<sup>531</sup> The distribution of motivations across family legacy, research validation, and community service reflects organizational value propositions that operate simultaneously rather than in competition.

Documentation requirements across heritage organizations reveal sophisticated standards reflecting evolving genealogical methodology and institutional commitment to accuracy. Approximately 54% of participants belonged to organizations requiring formal lineage proof, while only 9% belonged to groups with no documentation requirements—a distribution that reflects the field’s movement toward rigorous verification standards. LA observes variation across organizations: “there is variety between the groups... Holland Dames. That’s probably one of the more extensive applications... Some only require you can send it in approved app from DAR.”<sup>532</sup>

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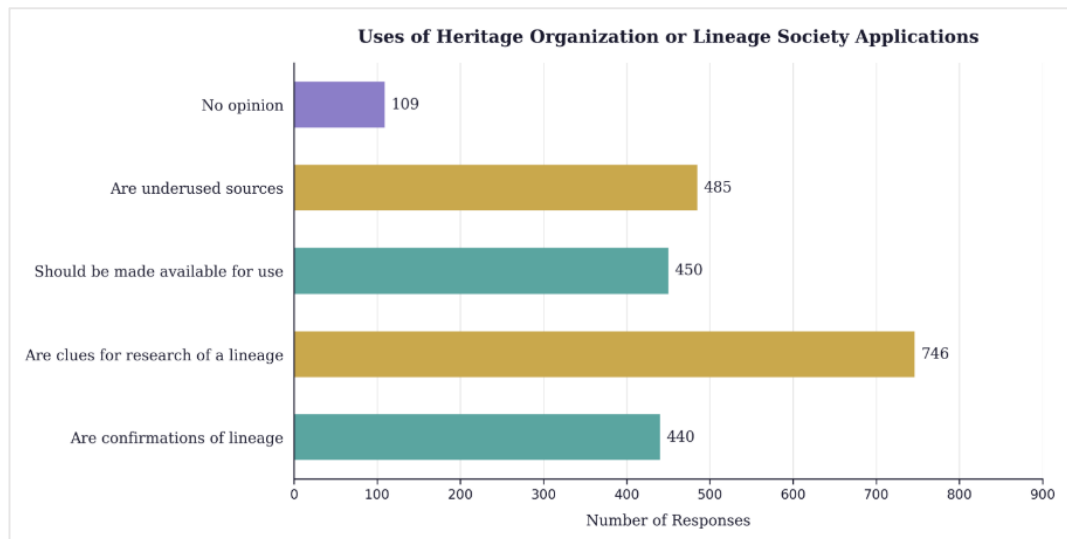
<sup>529</sup> ME. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>530</sup> GB. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>531</sup> JD. (2022) Interviewed by S. Combs-Bennett. 21 July. Zoom.

<sup>532</sup> LA. (2022) Interviewed by S. Combs-Bennett. 2 July. Zoom.

As shown in Figure 31, participants most frequently described lineage society applications as clues for research, followed by the view that these applications represent an underutilized source for genealogical information. This emphasis on the evidentiary value of applications underscores the institutional commitment to accurate genealogical records, even as it reveals that practitioners approach these documents with the critical evaluation that genealogical standards require rather than accepting them uncritically.



**Figure 31:** Participant responses to a survey question asking how they view the uses of heritage organization or lineage society applications (multiple responses permitted;  $n = 1,164$ ). Applications serving as research clues ( $n = 746$ ) and as underused genealogical sources ( $n = 485$ ) were the two most frequently selected responses (shown in gold), together indicating that practitioners regard these documents as valuable but insufficiently utilized tools rather than definitive proof of lineage. That only 440 participants described applications as confirmations of lineage reflects the methodological sophistication documented in Section 7.4.4, where a majority of respondents declined to treat institutional documentation as standalone genealogical proof.

The practice of “dovetailing,” in which applicants use previously verified lineage information from one organization to satisfy requirements in another, indicates institutional recognition of shared genealogical standards while highlighting challenges in maintaining contemporary documentation requirements. Approximately 32% of participants successfully employed this strategy, whereas 30% reported being unable to use prior applications. This near-equal success and failure rate indicates the complex relationship between institutional standards and practical accessibility.

AL demonstrates this phenomenon: “the requirements have become more rigorous... I linked to an application from my great-grandmother’s sister from back in the thirties... one of the pieces

of documentation that she presented... was just a picture of the person's tombstone."<sup>533</sup>

Tombstone photographs that satisfied early twentieth-century standards no longer constitute sufficient proof under contemporary genealogical methodology, which requires corroboration from primary civil or church records. This institutional adaptation demonstrates commitment to maintaining current research standards while acknowledging the historical context of earlier applications. A balance that simultaneously protects organizational credibility and creates additional work for applicants connecting to older lineages.

## 7.2. The Demographics of Membership

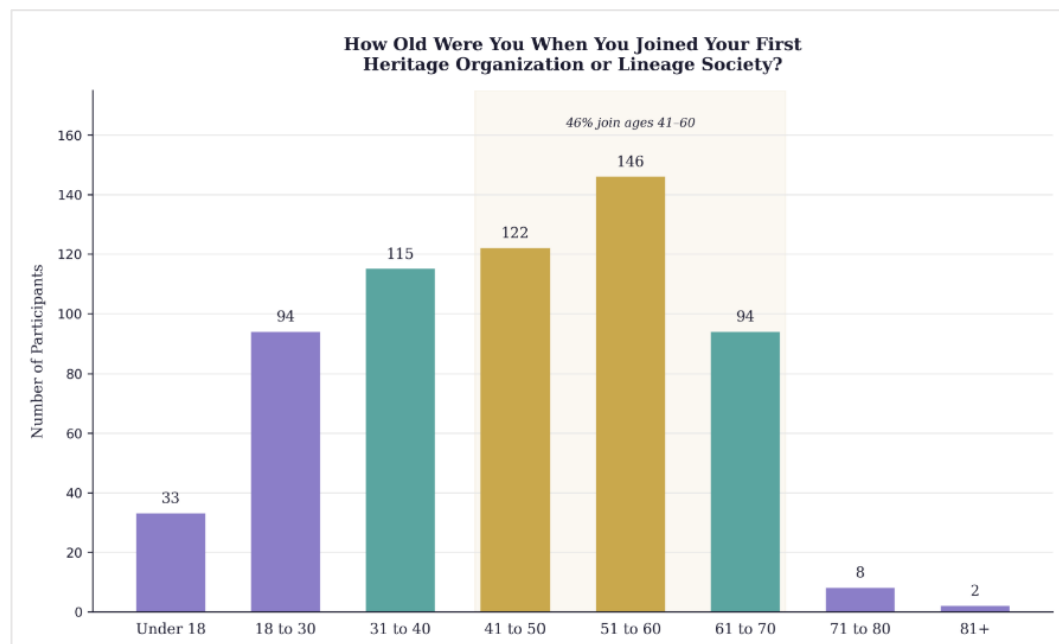
The typical entry into heritage organizations occurs in middle age, as shown in Figure 32, with membership peaking among individuals aged 51–60. This bell-shaped distribution reflects life-stage factors, including career stability, available time, financial resources, and a developed interest in family history. JD's experience illustrates the pattern: "I knew from the time I was in college that I was eligible... that was in the seventies, and that was the furthest thing from my mind... 50 years later."<sup>534</sup> This five-decade delay between awareness of eligibility and pursuit of membership illustrates that organizational relevance depends not merely on eligibility but also on reaching life circumstances in which ancestral connection becomes personally meaningful.

Relationships between age and organizational engagement reveal that 46% of members join between ages 41 and 60, while only 7.7% join before age 30. The generational cohort patterns that shape these trajectories are analyzed in detail in Chapter 5 (Sections 5.1.2 and 5.1.3), which documents how the primary cohort (born 1953–1964) and the digital native cohort (born 1985–1995) approach genealogical practice through different methodological frameworks. Within the membership context, younger cohorts demonstrate higher rates of interest in professional credentialing, 28.7% actively considering genealogical certification, suggesting evolving pathways to institutional engagement that may not follow traditional patterns. For organizations dependent on sustained membership, this concentration of joining in middle age creates persistent recruitment challenges: if younger practitioners consistently defer membership, each generation postpones engagement until eligibility awareness intersects with life-stage readiness.

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<sup>533</sup> AL. (2022) Interviewed by S. Combs-Bennett. 7 July. Zoom.

<sup>534</sup> JD. (2022) Interviewed by S. Combs-Bennett. 21 July. Zoom.



**Figure 32:** Age at which survey participants joined their first heritage organization or lineage society ( $n = 614$  members responding). The distribution peaks in the 51–60 age bracket ( $n = 146$ ), producing a bell curve skewed toward middle age that reflects life-stage factors including career stability, discretionary time, and a fully developed interest in family history. Gold bars mark the peak joining decade; teal bars mark the broader middle-age joining band (ages 31–70) within which 46% of all members joined; purple bars mark the youngest and oldest groups. Only 7.7% of members joined before age 30, indicating that awareness of eligibility routinely precedes actual membership by decades.

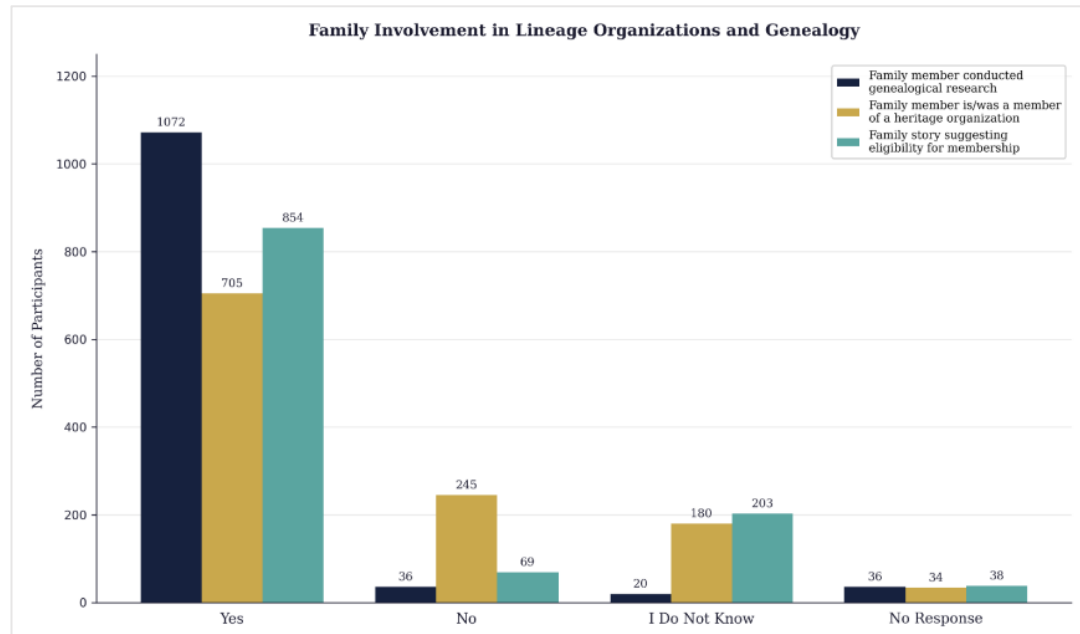
### 7.2.2 Kinship Networks and Membership

Survey data reveal substantially elevated levels of intergenerational engagement, with 92% of participants reporting family involvement in genealogical pursuits. Three-fifths of participants (59%) cite family narratives as indicating eligibility for membership in lineage societies, while slightly more than half (54%) identify family members with existing organizational affiliations, creating robust networks for recruitment and institutional knowledge transfer. CC’s experience exemplifies this pattern: “my grandmother was a member. So, it was a legacy member[ship].”<sup>535</sup> As shown in Figure 33, existing family affiliation significantly increases the likelihood of joining, reflecting how social capital and insider knowledge of organizational procedures facilitate successful applications and ongoing engagement.

These intergenerational networks sustain organizational continuity while potentially reinforcing existing participation patterns. Approximately one-third of participants (32%) indicate no known family organizational involvement, representing opportunities for institutional outreach

<sup>535</sup> CC. (2022) Interviewed by S. Combs-Bennett. 11 July. Zoom.

beyond traditional family-based recruitment. Two interview participants reported joining in their 20s as the first known members in their families: RT was “the first one to go down that path,” and MC stated, “nobody else in the family had ever been associated with DAR.”<sup>536</sup> These first-generation members represent a distinct recruitment pathway that organizations must actively cultivate to achieve demographic renewal beyond their established membership networks.



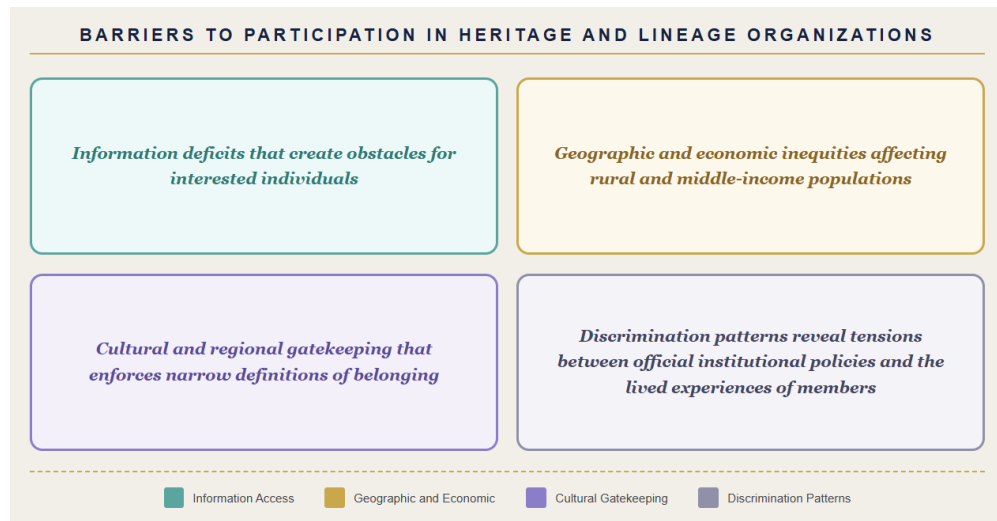
**Figure 33:** Survey participant responses to three questions measuring family involvement in genealogy and lineage society membership ( $n = 1,164$ ). Navy bars indicate whether a family member had conducted genealogical research (Yes: 1,072; 92.1%); gold bars indicate whether a family member was a current or former member of a heritage organization (Yes: 705; 60.6%); teal bars indicate whether a family narrative suggested the participant might qualify for membership (Yes: 854; 73.4%). The strong predominance of “Yes” responses across all three questions confirms that intergenerational knowledge transfer remains the primary pathway into hereditary organization membership, with family networks providing both genealogical information and institutional awareness. The substantially lower “Yes” rate for existing organizational membership (gold) compared with qualifying family narratives (teal) indicates that awareness of potential eligibility does not automatically translate into active pursuit of membership — a gap that organizations must address through targeted outreach.

### 7.3. The Compounding Nature of Exclusion

While heritage organizations preserve historical memory and connect individuals with their ancestral past, documented barriers prevent broad participation in these institutions. As shown in Figure 34, the obstacles to participation extend beyond disinterest or lack of qualifying ancestors. They reflect structural inequities embedded in organizational cultures, geographic distributions, and social dynamics. These barriers create compounding effects that operate

<sup>536</sup> MC. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom; RT. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

simultaneously across multiple dimensions, cumulatively disadvantaging prospective members who lack the combination of knowledge, financial resources, geographic access, and social networks required for participation.



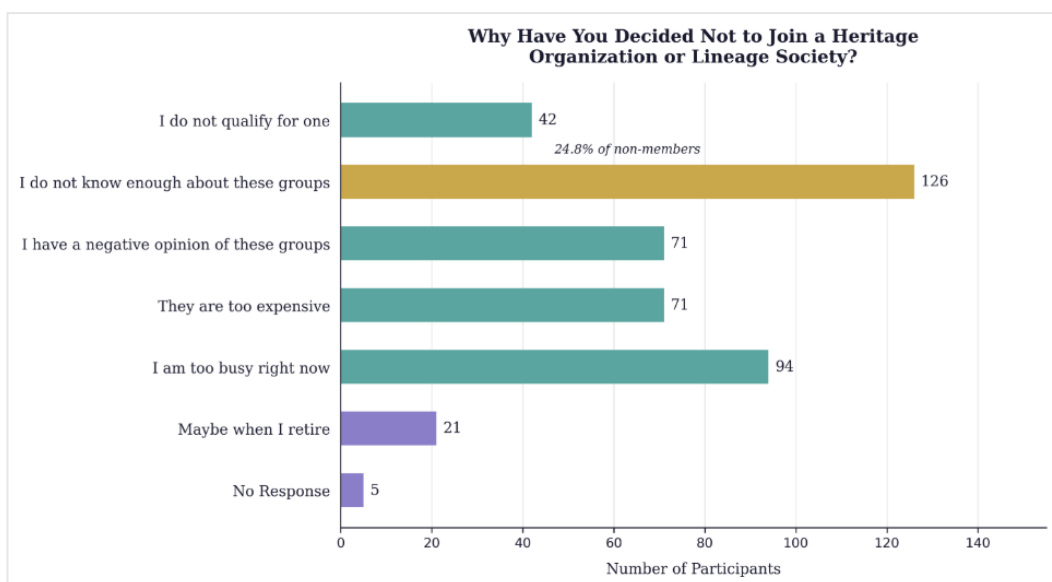
**Figure 34:** Barriers to participation extend beyond simple disinterest or the absence of qualifying ancestors and instead reflect structural inequities embedded in organizational cultures, geographic distributions, and social dynamics. Information deficits, geographic and economic constraints, cultural gatekeeping, and discrimination patterns together constitute a multi-layered system that privileges specific populations while marginalizing others — illuminating how heritage organizations may inadvertently perpetuate exclusionary practices that limit their accessibility in contemporary society.

### 7.3.1. Information Deficits

Among the 353 participants who identified as non-members, a lack of knowledge emerges as the most significant barrier, as shown in Figure 35, with 24.8% indicating they “do not know enough about these groups.” Participants expressed uncertainty about organizational operations, qualification requirements, and membership processes. Some explicitly stated they did not know whether they qualified for any organization, demonstrating that access to information is a fundamental challenge for potential members seeking to understand both eligibility and the value proposition of organizational membership.

This information deficit may reflect the specialized nature of genealogical research communities, geographic limitations in organizational visibility, or inadequate public education about the resources and services these institutions provide. LT’s account of her first meeting illustrates how abruptly this gap becomes apparent: “I wanted to learn more about it. So, I go to my first meeting... and the registrar goes, so [LT], tell me about your Patriot. And I go, what? I

didn't realize you needed to have a Patriot to join DAR."<sup>537</sup> For prospective members without family connections to guide them, the specialized vocabulary and procedural requirements of hereditary organizations constitute a hidden curriculum that self-selection cannot overcome without active institutional effort to communicate requirements.



**Figure 35:** Reasons given by survey participants for choosing not to join a heritage organization or lineage society (n = 353 non-members; multiple responses permitted). Insufficient knowledge of these organizations was the most frequently cited barrier (n = 126; 24.8%), shown in gold, indicating that information accessibility constitutes the single greatest obstacle to potential membership. Substantive barriers — time constraints (n = 94), cost (n = 71), negative perceptions (n = 71), and perceived ineligibility (n = 42) — are shown in teal. "Maybe when I retire" (n = 21) and "No Response" (n = 5), shown in purple, represent non-substantive or deferred responses. The dominance of the knowledge gap over financial and attitudinal barriers suggests that targeted outreach and clearer public communication about organizational requirements and eligibility could expand the prospective membership pool more effectively than fee reductions alone.

The complexity of application processes and documentation requirements compounds these knowledge barriers. One participant noted they were “currently working on gathering documents; it takes time.”<sup>538</sup> Even when organizational requirements are understood, navigating them successfully demands substantial effort and often the assistance of experienced researchers. SZ describes the scale of volunteer commitment required: “You have to get the volunteers to spend hours and hours. I know I’ve spent a lot more than a hundred hours on... two cousins.”<sup>539</sup> The intersection of knowledge gaps with procedural complexity creates compounding obstacles that disproportionately affect individuals who lack family connections or prior genealogical research experience.

<sup>537</sup> LT. (2022) Interviewed by S. Combs-Bennett. 1 July. Zoom.

<sup>538</sup> R\_0pnDNjpu3LNDuhz. (2022) Study Survey [Unpublished Raw Data].

<sup>539</sup> SZ. (2022) Interviewed by S. Combs-Bennett. 26 June. Zoom.

### 7.3.2. Geographic and Financial Barriers

The geographic and financial dimensions of organizational participation are analyzed in depth in Chapter 5 (Sections 5.2.2 and 5.4), which documents the “missing middle” pattern in which financial barriers affect middle-income households (\$40,000–\$60,000 bracket, 31.0% reporting obstacles) more acutely than either higher- or lower-income groups, and demonstrates how rural participants report higher financial barriers (9.2%) compared with urban (6.1%) and suburban (5.0%) participants. These patterns reflect the specific cost structure of the hereditary organization subculture relative to other genealogical communities, in which FamilySearch provides free access to major databases, while regional societies typically charge minimal membership fees.

Within the qualitative data, interview participants illuminate how these statistics translate into lived experience. GB’s incredulity at Jamestown Society fees captures the essential tension: “It’s \$400 to join Jamestown, \$400! And you do \$150 just to apply... some people don’t have that kind of money, so already it’s exclusive.”<sup>540</sup> The \$150 non-refundable application fee is particularly significant: prospective members must pay a substantial sum before learning whether their application will be accepted, creating a financial risk that budget-conscious practitioners must weigh against the uncertainty of the outcome. Financial barriers extend beyond membership fees into the ongoing costs of participation. TH enumerates the cumulative expenses: “you have to pay for parking, you have to pay for however you’re going to get there either by train or Metro.”<sup>541</sup> TH’s urban-centric examples reveal how organizational structures developed around members with metropolitan access, creating additional obstacles for rural practitioners who must also account for fuel costs, longer travel times, and accommodation expenses. The expansion of virtual meeting options following the pandemic has begun to address geographic barriers; MC observed that “having these virtual meetings... is really useful even beyond COVID.”<sup>542</sup> This practical adaptation reduces the cost of ongoing participation even when it cannot eliminate application-related expenses.

### 7.3.3. Regional Identity as Gatekeeper

Negative perceptions of heritage organizations serve as significant deterrents to membership, with many participants viewing these groups as elitist or status-driven. One participant articulated this philosophical objection: “I object to the fundamental concept of an exclusive

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<sup>540</sup> GB. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>541</sup> TH. (2022) Interviewed by S. Combs-Bennett. 14 July. Zoom.

<sup>542</sup> MC. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

group based on what dead people did 200+ years ago.”<sup>543</sup> Such views reflect broader cultural tensions about meritocracy and inherited privilege that organizations claiming democratic values must address to remain relevant.

Regional and cultural dynamics compound formal barriers, as participants report discrimination based on geographic origin or cultural background. Survey participants described experiencing resistance because they were not “Southern enough” or faced challenges “due to family having no recent residence in the [area].”<sup>544</sup> These responses reveal how regional identity functions as an unofficial gatekeeping mechanism within organizations that officially require only documented ancestral connection. The phrase “Southern enough” implies cultural standards that extend well beyond genealogical requirements, while expectations regarding residential histories create barriers for geographically mobile Americans whose families relocated for economic opportunities. GB’s encounter with social screening captures how this informal gatekeeping operates: “This woman comes up to me... her first question to me, who are your people?... the snobbery is there.”<sup>545</sup> The “who are your people” question evaluates whether prospective members possess the cultural capital to navigate organizational expectations. A form of social testing that operates regardless of official policy and creates experiential realities that diverge from institutional rhetoric about welcoming all documented descendants.

Privacy concerns represent an additional and underappreciated barrier. One participant objected to requirements for comprehensive family information: “They require irrelevant information. For example, my husband’s personal information. My parents’ marriage and divorce information. My previous divorce info[rmation]. My children’s personal info[rmation]. That’s not happening.”<sup>546</sup> These concerns reflect contemporary expectations about data collection and personal information sharing that conflict with traditional genealogical documentation practices and the institutional requirements for comprehensive family records.

#### 7.3.4. The Reality of Local Discrimination

Analysis of discrimination within lineage societies reveals meaningful patterns that distinguish official institutional policies from individual member behaviors. The higher prevalence of member-level discrimination (14.0%) compared with chapter-level discrimination (8.1%) is statistically significant ( $\chi^2 = 42.86$ ,  $p < 0.001$ ), indicating that discrimination reported by

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<sup>543</sup> R\_W6yRWaSTBSp8Wdj. (2022) Study Survey [Unpublished Raw Data].

<sup>544</sup> R\_3eFMaKBuwYrcJJ7. (2022) Study Survey [Unpublished Raw Data]; R\_x5g3G3k6eEUCsG5. (2022) Study Survey [Unpublished Raw Data].

<sup>545</sup> GB. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>546</sup> R\_3DvieWyLQdZKOYv. (2022) Study Survey [Unpublished Raw Data].

members reflects real disparities rather than random variation. That institutional policies are more inclusive than individual member behavior suggests that formal policy change, while necessary, is insufficient to transform organizational culture.

Political discrimination represents the most frequently reported form of exclusion, as shown in Figure 7.8, with disparity between chapter-level (33%) and member-level (46%) rates indicating that interpersonal interactions reveal higher rates of political selectivity than institutional policies acknowledge. Interview participant TK described experiencing these dynamics: “And as you can imagine, in those areas where our politics are divided, people have had a harder time. You have members who are being asked, how did they get here? You know, their applications are being given so much examination before it even hits national’s eyeballs... There are members who are being... disrespected, blatantly told that they cannot join for some made-up reason that does not exist.”<sup>547</sup> TK’s account demonstrates how political bias can corrupt application review processes that are designed to evaluate genealogical evidence rather than political alignment. The fact that this occurs at the member level rather than the chapter level reflects the difficulty of enforcing inclusive policies in the face of interpersonal resistance.

The forms of discrimination reported extend beyond politics to include social class, age, gender, sexuality, ethnicity, and regional identity. Interview participants identified ageism and internal power dynamics as particularly prevalent:

LT: “I do feel that a lot of them... feel like they can talk to me a certain way... well she’s young, you know, who cares.”<sup>548</sup>

TK: “reverse ageism... You’re still our kids and you’re not ready for that yet.”<sup>549</sup>

SZ: “they get vicious. There’s just been this vicious infighting... throwing people off the board.”<sup>550</sup>

LT’s experience of dismissive treatment based on youth illustrates how age-based hierarchies create unwelcoming environments for younger members whose engagement organizations claim to value. TK’s observation of “reverse ageism” demonstrates that exclusionary dynamics operate bidirectionally: younger members face structural exclusion from leadership regardless of demonstrated competence, while established leaders control organizational direction through seniority rather than merit. SZ’s description of “vicious infighting” reveals the internal power struggles that can make organizational participation emotionally costly, particularly for

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<sup>547</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

<sup>548</sup> LT. (2022) Interviewed by S. Combs-Bennett. 26 June. Zoom.

<sup>549</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

<sup>550</sup> SZ. (2022) Interviewed by S. Combs-Bennett. 26 June. Zoom.

members without established networks. These interpersonal dynamics explain why survey data showed higher member-level (14.0%) than chapter-level (8.1%) discrimination: organizations may adopt inclusive policies while their cultures perpetuate exclusionary behaviors that policy language alone cannot address. The gap between formal policy and cultural practice represents the central challenge for organizations that have made genuine institutional commitments to inclusion while their membership continues to reflect longer historical patterns.

#### **7.4. The Mechanics of Membership Verification**

The verification of ancestral lineages operates as the central mechanism through which heritage organizations maintain their identity and membership standards. Beyond document review, the application process constitutes a complex system in which human judgment, evolving standards, and institutional priorities converge to determine who gains entry to these communities.

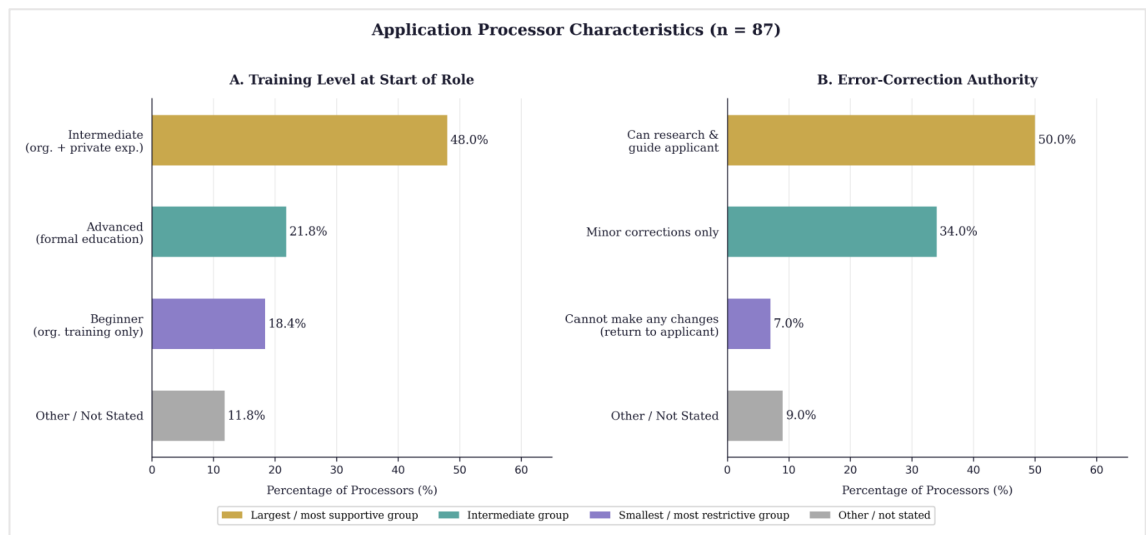
Analysis of 87 application processors from the survey reveals how professional expertise and subjective interpretation interact with objective genealogical standards in practice.

##### **7.4.1. The Human Algorithm**

Participants who identified as application processors provided insights into how heritage organizations manage membership verification and maintain documentation standards. This group comprises chapter officers (19.0%), volunteers (70.1%), state officers (9.1%), and staff genealogists (1.8%), representing the institutional infrastructure that translates organizational requirements into practical decisions. As shown in Figure 36, the largest group (48%) reports intermediate-level training combining organizational instruction with private research experience, while advanced practitioners (21.8%) bring years of formal education. A significant proportion (18.4%) began as beginners trained primarily by their organizations, creating a distribution of expertise that promotes diverse perspectives while ensuring systematic skill development. Some chapters formalize this succession, as SZ describes: “We have a genealogy committee that meets once a month... we train them partly to get new registrars.”<sup>551</sup>

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<sup>551</sup> SZ. (2022) Interviewed by S. Combs-Bennett. 26 June. Zoom.

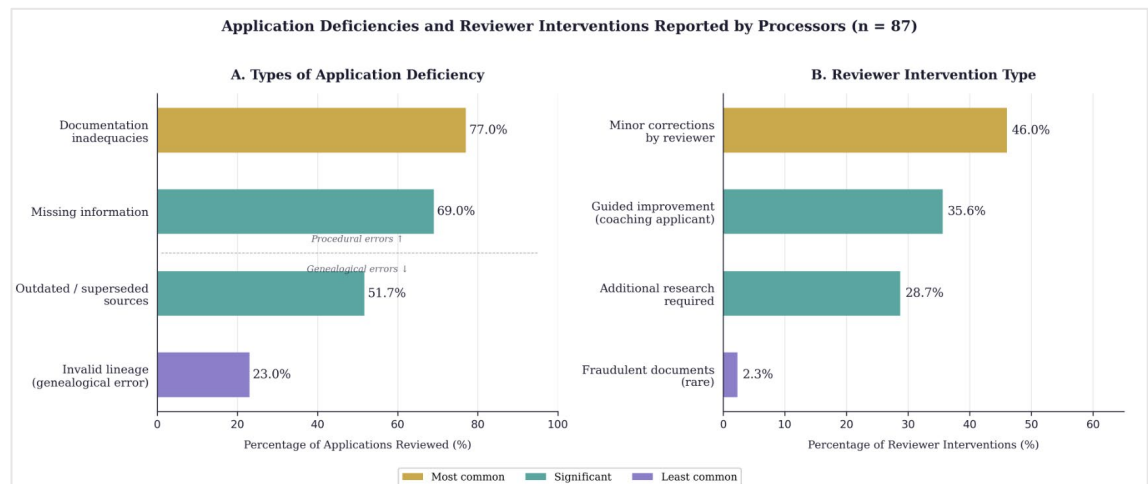


**Figure 36:** Characteristics of survey participants who identified as application processors ( $n = 87$ ). Panel A shows the distribution of training levels at the start of their processing role: the largest group (48%, gold) reported intermediate-level training combining organizational instruction with private research experience; advanced practitioners with formal education accounted for 21.8% (teal); and 18.4% began as beginners trained primarily by their organizations (purple). Panel B shows the scope of error-correction authority held by processors: half (50%, gold) are authorized to conduct independent research to fix errors and guide applicants; one-third (34%, teal) may make minor corrections only; and 7% (purple) must return applications without modification. The processor role was held predominantly by chapter volunteers (70.1%), with chapter officers (19.0%), state officers (9.1%), and staff genealogists (1.8%) comprising the remainder. Together, the two panels reveal that the application review process is staffed largely by experienced volunteers with meaningful discretion to assist applicants, though the variation in correction authority across chapters creates institutional variability that national policy cannot fully standardize.

Error-correction policies reflect a commitment to supporting successful applications rather than rigid adherence to procedural requirements. Most processors (50%) can conduct research to fix application errors and provide guidance to applicants; one-third (34%) can make minor corrections to submitted applications; only 7% cannot make any changes, requiring a complete return of submissions. This supportive approach prioritizes successful outcomes while maintaining documentation standards, though variations in correction authority reveal different institutional philosophies regarding processor autonomy and applicant assistance. The practical implication is that an applicant's experience of the application process depends substantially on which processor reviews the application and the policies of the specific chapter, creating geographic and institutional variability in accessibility that national-level policies cannot fully standardize.

### 7.4.2. The Spectrum of Application Issues

Analysis of application deficiencies reveals that technical issues, missing documentation, or incomplete lineage information are more common than substantive genealogical problems involving invalid lineages, as shown in Figure 37. Documentation inadequacies constitute the predominant category of application problems, affecting 77.0% of reviewed applications and reflecting both procedural oversight and deeper challenges in understanding contemporary genealogical proof standards. Missing information affects 69.0% of reviewed submissions, encompassing both inadvertent omissions and systematic gaps in genealogical documentation. Source accuracy remains a persistent challenge, with 51.7% of applications incorporating outdated or superseded references that were once considered authoritative but now require contemporary validation. DL articulates the implication directly: “You can’t rest on the laurels of older applications... you have to basically review it.”<sup>552</sup> That the majority of application problems are technical rather than substantive suggests that many prospective members have legitimate qualifying lineages but lack the procedural knowledge or document access to present them effectively—a finding that points toward the value of research assistance programs rather than simply raising or lowering evidentiary thresholds.



**Figure 37:** Application deficiencies and reviewer interventions as reported by application processors ( $n = 87$ ). Panel A shows the frequency of deficiency types across reviewed applications: documentation inadequacies were the most common problem (77.0%, gold), followed by missing information (69.0%, teal), outdated or superseded sources (51.7%, teal), and invalid lineages representing actual genealogical error (23.0%, purple). The dashed line distinguishes procedural errors above from substantive genealogical errors below, confirming that the majority of application failures reflect problems of documentation and procedure rather than invalid ancestry. Panel B shows the types of interventions reviewers undertook in response: minor corrections by the reviewer were most common (46.0%, gold), followed by guided improvement of the applicant's submission (35.6%, teal) and cases requiring additional research (28.7%, teal). Fraudulent documentation, while noted by processors, was rare (2.3%, purple). Together, the two panels demonstrate that the application process is characterized by a supportive rather than gatekeeping orientation, with reviewers primarily addressing correctable procedural deficiencies rather than rejecting applications on genealogical grounds.

<sup>552</sup> DL. (2022 Interviewed by S. Combs-Bennett. 19 June. Zoom.

Reviewer interventions frequently focus on minor corrections (46.0%) and guided improvement (35.6%), with a considerable proportion requiring additional research (28.7%). Errors range from inadvertent omissions to, in rare cases, fraudulent documentation. RT offers perspective on honest genealogical errors: “there are people in the future who might depend on that as fact, and you know, if you don’t know that someone isn’t your biological parent, then that was it. That was an honest mistake. And that also happens. And I’m sure it happened in the past... That’s not the majority of lineages.”<sup>553</sup> RT’s observation is analytically important: it distinguishes between the systematic fraudulent manipulation that institutional review must detect and the honest genealogical errors that arise from incomplete information or non-paternity events that no living person could reasonably have known. The former requires investigative scrutiny; the latter requires compassion and methodological sophistication in applying proof standards to ambiguous evidence.

### 7.4.3. Certification and Institutional Standards

Professional certification emerges as a significant determinant of institutional credibility and research sophistication within genealogical communities, with substantial methodological disparities between certified and non-certified practitioners. AA articulates the professional perspective: “when you’re a professional researcher or you’ve gone to school to study this, you look at it differently and you ask different questions. And not that the average person isn’t maybe asking all of those questions, they accept it at face value.”<sup>554</sup> AA’s distinction between critical evaluation and uncritical acceptance captures the essential difference that professional training produces: the ability to interrogate sources, identify conflicts in evidence, and reason explicitly toward documented conclusions.

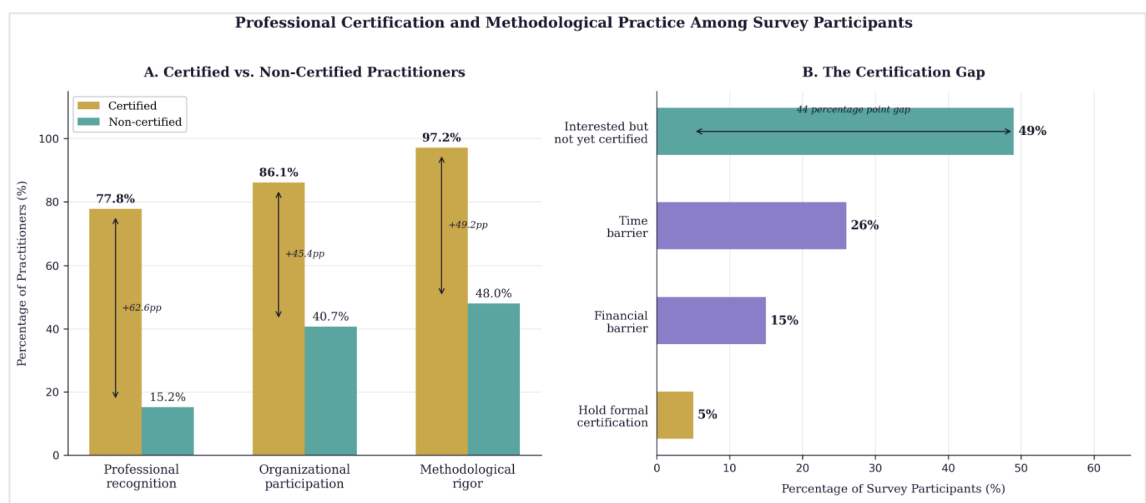
As shown in Figure 38, certified researchers demonstrate significantly higher methodological rigor (97.2%) than their non-certified counterparts (48.0%). Institutional engagement patterns also differ markedly: certified practitioners exhibit higher participation rates (86.1% versus 40.7%) and professional recognition within genealogical communities (77.8% versus 15.2%). This recognition differential confirms that certification plays a substantive role in establishing credibility, facilitating integration with professional networks, and earning the institutional standing that enables certified researchers to advocate for methodological standards. MK observed that expanding access to certification training has been “a really positive thing for the

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<sup>553</sup> RT. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>554</sup> AA. (2022) Interviewed by S. Combs-Bennett. 22 June. Zoom.

community, because as people look at the process of becoming certified and see it as more attainable, they're more interested in learning the skills to become certified... and lift the whole industry up."<sup>555</sup> The near-universal requirement for independent verification (91.7%) among certified practitioners, evidenced in independent verification practices (97.2%), additional documentation requirements (94.4%), and standards comparison (88.9%), demonstrates systematic rigor rather than mere skepticism, confirming that certification produces measurable differences in research practice. As documented in Chapter 5, however, only 5% of survey participants hold formal certification despite 49% expressing interest, with time constraints (26%) and financial considerations (15%) constituting the primary barriers.<sup>556</sup> The gap between interest and attainment represents both an organizational challenge and an opportunity for professional development initiatives that could raise practice standards across the subculture.



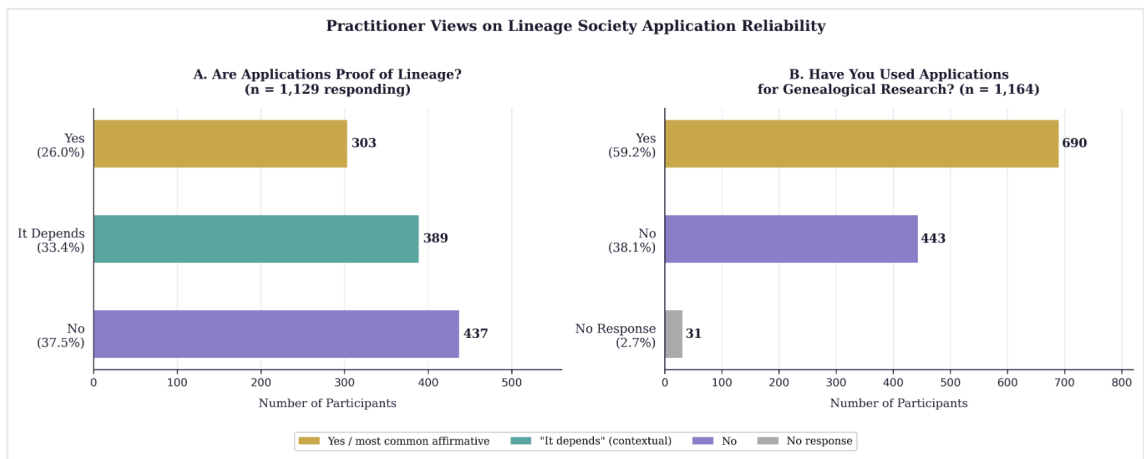
**Figure 38:** Professional certification and its relationship to genealogical practice among survey participants. Panel A compares certified and non-certified practitioners across three measures of professional engagement. Certified researchers demonstrate substantially higher methodological rigor (97.2% vs. 48.0%, a 49.2 percentage-point gap), organizational participation (86.1% vs. 40.7%), and professional recognition within genealogical communities (77.8% vs. 15.2%), with double-headed arrows indicating the magnitude of difference in each category. Panel B illustrates the certification gap: while only 5% of participants hold formal certification (gold), 49% report active interest in pursuing it (teal) — a 44 percentage-point gap. Time constraints (26%, purple) and financial barriers (15%, purple) are the primary obstacles preventing interested practitioners from attaining credentials they recognize as professionally valuable. Together, the two panels establish both the measurable benefits of certification and the structural barriers that prevent a large majority of interested practitioners from achieving it.

<sup>555</sup> MK. (2022) Interviewed by S. Combs-Bennett. 2 July. Zoom.

<sup>556</sup> See Chapter 5, Section 5.4, for full analysis of the certification gap and the time and financial barriers that prevent practitioners from pursuing formal credentials despite strong interest.

#### 7.4.4. The Reality of Application Reliability

The relationship between institutional documentation and genealogical research reveals nuanced practitioner attitudes that neither uncritically defer to, nor wholesale reject organizational authority. While 59.2% of participants have used heritage organization applications for genealogical research, only 26.0% consider them definitive proof of lineage; 33.2% respond “it depends”; and 37.5% do not consider them proof. This distribution, shown in Figure 39, reflects a sophisticated practitioner's understanding of these documents as valuable research tools that require critical evaluation rather than simple acceptance.



**Figure 39:** Practitioner views on the reliability of heritage organization and lineage society applications (n = 1,164). Panel A shows responses to whether older applications constitute proof of lineage: a majority do not accept them as definitive, with 37.5% responding no (purple, n = 437), 33.4% responding “it depends” (teal, n = 389), and only 26.0% treating them as proof (gold, n = 303). Panel B shows whether participants have used previously submitted applications for their own genealogical research: 59.2% have done so (gold, n = 690), while 38.1% have not (purple, n = 443). The gap between high research use (59.2%) and low acceptance as definitive proof (26.0%) reflects a sophisticated practitioner stance: applications are treated as valuable research leads and documentary clues rather than conclusive genealogical evidence.

The “it depends” responses acknowledge that applications vary substantially in evidentiary quality depending on when they were submitted, by whom, and under what organizational standards were then in force. As one participant observed: “Older organizations tend to have more strict guidelines, but older lines/proof may be flawed/not pass today’s standard for their own organization.” GB describes the evolution she has witnessed: “had to dig back and they had to reapply and prove now because everything is online more and more. It’s gotten stricter and stricter, and you have to absolutely produce the documentation. So, it’s gotten more professional. And I think that’s a wonderful thing... we’re looking for absolute proof, absolute

proof.”<sup>557</sup> GB’s characterization of increasing rigor as a “wonderful thing” reflects a practitioner perspective that values institutional credibility: applications submitted under the more demanding contemporary standards warrant greater evidentiary weight than those submitted under earlier, less rigorous requirements, and organizations that have enforced this evolution have strengthened their standing as authoritative repositories of documented lineage.

## **7.5. Responding to Societal Shifts**

Heritage organizations occupy a critical juncture where technological transformation and evolving social expectations converge to challenge fundamental assumptions about institutional purpose, membership engagement, and organizational relevance. Institutions founded on nineteenth-century principles and operating in twenty-first-century contexts must navigate the balance between preserving their historical missions and adapting to contemporary expectations. Maintaining traditional verification standards, embracing technological efficiencies, honoring their founding narratives, and addressing the exclusionary histories that continue to shape external perceptions.

### **7.5.1. Technology: Strengths, Challenges, and the Digital Divide**

Technology adoption within heritage organizations depends heavily on individual members’ knowledge, training, and comfort with available tools. MK identifies a fundamental bifurcation in the challenge: “there’s two different aspects. There’s not understanding that people are on Instagram and then there’s how the heck do I put up a website.”<sup>558</sup> The first problem is strategic; the second is operational. Together, they indicate that organizations face not merely a technology adoption challenge but an educational deficit that must be addressed systematically. LA illustrates how basic financial technology creates intergenerational friction: “they say they won’t use PayPal... want you to write a check for everything. And younger people don’t have checkbooks.”<sup>559</sup>

The strengths of digital technology for hereditary organization practice are substantial. Geographic access to primary sources has been transformed: CC describes accessing mid-eighteenth-century Pennsylvania land records from home without having to travel to

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<sup>557</sup> GB. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>558</sup> MK. (2022) Interviewed by S. Combs-Bennett. 2 July. Zoom.

<sup>559</sup> LA. (2022) Interviewed by S. Combs-Bennett. 2 July. Zoom.

Philadelphia or Harrisburg.<sup>560</sup> Online databases enable cross-index searching that would require weeks of manual labor, compress research timelines, and reduce costs of accessing records held in distant repositories. Virtual meetings, accelerated by the COVID-19 pandemic, reduce participation costs for members in rural areas or those with mobility limitations. Professional genealogist AF captures how digital tools align with the verification work that organizations require: “I’m very good at FamilySearch. Go to the catalog, look at this page. Here’s the link, you do this, you do that. Because in my opinion, 90% of what the members of societies need is detailed instructions on using technology.”<sup>561</sup>

The weaknesses and limitations of digital genealogy for hereditary organization practice are equally significant. Subscription costs for major commercial databases create access barriers for middle-income practitioners, as documented in Chapter 5. Digital literacy requirements exclude practitioners who lack confidence with online research tools; AF’s observation that Millennial researchers can navigate the FamilySearch catalog more intuitively than experienced practitioners “after years of use” identifies a generational competency gap that training programs struggle to close. Most critically for hereditary organization purposes, the institutional commitment to certified copies of primary source documents—birth certificates, marriage records, military service records, wills—persists even in the digital age, because digital images from commercial databases are not uniformly accepted as standalone evidence. McKay anticipated this dynamic in 1981, observing that computers would not revolutionize genealogy because they would not do the research on behalf of users; technological tools would augment rather than replace traditional research practices.<sup>562</sup> The survey data confirm this prediction: organizations have integrated digital tools into their workflows while preserving the paper-documentation requirements that underpin their evidentiary standards. The challenge for the next generation of members will be understanding why institutional requirements that seem bureaucratically conservative in a digital age continue to serve the accuracy goals that define the subculture’s value.

### **7.5.2. Acknowledging Erased Histories and Organizational Adaptation**

Heritage organizations have confronted challenges related to diversity throughout their histories, and documented responses range from inadequate to substantive. External perceptions of these organizations remain shaped by historical incidents that organizations continue to work against. In the case of the NSDAR, the 1939 denial of performance rights to Marian Anderson—a

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<sup>560</sup> CC. (2022) Interviewed by S. Combs-Bennett. 11 July. Zoom.

<sup>561</sup> AF. (2022) Interviewed by S. Combs-Bennett. 2 July. Zoom.

<sup>562</sup> McKay, Jack. (1981) *op. cit.* p. 8.

celebrated African American contralto—at Constitution Hall remains, according to members interviewed for this research, the single event most frequently raised in public conversations about the organization.<sup>563</sup> The persistent association of an organization with a single historical incident, nearly nine decades removed, illustrates both the weight of institutional history and the difficulty of overcoming it through subsequent action.

The United Daughters of the Confederacy (UDC) presents a more complex contemporary case. During the Black Lives Matter protests of the early 2020s, the UDC headquarters in Richmond, Virginia, was set on fire by protesters. An event that confronted researchers studying the American South with an acute paradox: the UDC holds extensive primary documentation on Southern history and lineages, much of it undigitized and inaccessible outside its archives.<sup>564</sup> Interview participants offered measured perspectives on the UDC. CAC stated: “I wouldn’t join something like that... my hope is that [people] would maybe look at their mission.”<sup>565</sup> LA described advising a young woman beginning her career against joining because of reputational risks.<sup>566</sup> WM expressed an internal conflict that illuminates how contemporary members navigate organizations whose historical identity has become a liability: “I think in particular UDC... they have... the public perception is they’re... all white supremacists... I don’t even go to the meetings because I don’t like what they do... I’m proud that I have Confederate ancestors... but do I want slavery back? No... I mean, they could do more.”<sup>567</sup> WM’s statement captures the tension between personal genealogical connection to Confederate heritage and awareness that the organization has not successfully distinguished historical commemoration from racial politics. These perspectives illustrate that the diversity challenges facing hereditary organizations exist on a spectrum: some organizations have undertaken systematic transformation while others have not.

The NSDAR’s record on this dimension is measurably more substantive than its historical reputation suggests. The 1993 revision of its bylaws explicitly stated, “No chapter may discriminate against the applicant based on race or creed,” establishing formal policy prohibiting the exclusionary practices that had characterized some chapters’ historical behavior.<sup>568</sup> This policy change represented institutional acknowledgment that documented discrimination, including cases that led to litigation, demanded systematic responses. Beyond

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<sup>563</sup> I The case has been extensively documented in newspapers, books, and scholarly studies; members of the organization interviewed for this research consistently identified it as the historical event most commonly raised by the public in adverse discussions of the NSDAR.

<sup>564</sup> While the building was unoccupied at the time, the incident highlighted the UDC’s significance as an archival repository. The organization holds extensive primary documentation on the history and lineages of the American South, much of which has not been digitized and is unavailable outside its physical archives.

<sup>565</sup> CAC. (2022) Interviewed by S. Combs-Bennett. 20 July. Zoom.

<sup>566</sup> LA. (2022) Interviewed by S. Combs-Bennett. 2 July. Zoom.

<sup>567</sup> WM. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

<sup>568</sup> National Society Daughters of the American Revolution. (1993) Revision of Bylaws Committee, Article III Membership. *Proceedings of the One Hundred Second Annual Continental Congress*. 21 April. p. 44. For full discussion of the policy evolution leading to and following this revision, see Chapter 8, Section 8.5.3.

formal policy, the organization has developed proactive research support initiatives, including the 2008 expanded edition of *Forgotten Patriots: African American and American Indians in the Revolutionary War*, which documented more than 6,600 names of minority patriots, representing a significant institutional effort to acknowledge diverse contributions to American independence.<sup>569</sup> Specialty research teams for African American, Native American, French, and Spanish ancestry research, along with targeted research guidance for Jewish, African American, and Native American genealogical communities, address the structural barrier of documentary privilege—the unequal availability of genealogical records based on ancestors’ social position—that has historically made proving lineage more challenging for descendants of populations excluded from colonial and early national record-keeping.<sup>570</sup>

Interview participants noted both genuine organizational progress and persistent cultural gaps. AK defended her organization’s contemporary character: “If you go to dar.org, I think they really make sure that... our webpage shows the diversity and they have special research for African Americans... We are evolving.”<sup>571</sup> However, TK’s account of application processes being weaponized against qualified minority applicants through member-level resistance rather than chapter-level policy demonstrates that formal institutional commitments have not fully transformed organizational culture at the interpersonal level.<sup>572</sup> The higher prevalence of member-level discrimination (14.0%) than chapter-level discrimination (8.1%) documented in Section 7.3.4 confirms this pattern statistically. The distinction between structural limitations inherent to lineage-based membership. Such as the fact that proving colonial ancestry is more difficult for some populations due to historical record-keeping patterns, and the intentional discrimination that policy can and must address, remains analytically and ethically important. Contemporary organizations that have made genuine institutional commitments to inclusion face the ongoing challenge of ensuring that those commitments translate from policy documents into the everyday culture of individual chapters.

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<sup>569</sup> Grundset, Eric ed. (2008) *Forgotten Patriots: African American and American Indian Patriots of the Revolutionary War: A Guide to Service, Sources, and Studies*. 2nd expanded edn. Washington, D.C.: National Society Daughters of the American Revolution. The first edition, containing 2,400 names, was published in 2001; the expanded 2008 edition increased the total to over 6,600 names. See also Barboza, Maurice A. and Nash, Gary B. (2004) Opinion: We Need to Learn More About Our Colorful Past. *The New York Times*. 31 July. p. A14.

<sup>570</sup> See Chapter 8 for detailed discussion of NSDAR specialty research teams and outreach materials for Jewish, African American, and Native American genealogical communities.

<sup>571</sup> AK. (2022) Interviewed by S. Combs-Bennett. 6 July. Zoom.

<sup>572</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom. TK noted: “The documentation on the [document] states negro or white in most cases, in some generations. It doesn’t take a genius to see that. And if you join through a patriot of color, there is some color there.” TK further observed: “we have leaders who don’t fully understand... what it means to be a minority person.”

## 7.6 Genealogy, Academic Standing, and Institutional Purpose

The evolution of heritage organizations carries implications for historical research methodologies and genealogical studies that extend beyond institutional membership patterns. As De Groot identified, genealogy has moved from what was once regarded as “suspect activity” toward recognition as a repository of substantial documentation and a contributor to historical research on previously marginalized populations.<sup>573</sup> Survey data capture this repositioning: 62.0% of participants view genealogy as a subset of historical research, while 33.5% advocate for autonomous disciplinary recognition. NSW articulated the dual imperative: “I see it as a two-prong approach... one is being very honest about history and not just including different perspectives in history... And the second part... is just doing the research to understand what types of documentation can be available for different groups.”<sup>574</sup> Rhoads captured the democratic dimension of this function: genealogy is “the democratic impulse in the study of history,” tracing the roles of “humble persons” in the great events of national life.<sup>575</sup>

The academic positioning of genealogy remains contested. Durie argues that genealogy has suffered academic neglect throughout the twentieth century, with few universities offering programs designed specifically to develop genealogical research skills, analysis, and writing.<sup>576</sup> Mills elaborates on the practical consequences: the field’s “skills, knowledge base, analytical principles, and evidentiary standards are not obtainable through any traditional academic program”—not history, not law, not investigative journalism, even though genealogy draws upon all of these.<sup>577</sup> The survey’s certification gap, 5% holding formal credentials despite 49% expressing interest, provides empirical confirmation of this institutional inadequacy, indicating substantial unmet demand for formalized educational pathways within the subculture.

Hatton’s analysis of genealogical epistemology offers a framework for understanding what this disciplinary development entails. Hatton argues that proving genealogical identity is the essential precondition for genealogical inquiry: the goal is “to discriminate and confidently describe a unique individual,” establishing with evidence that multiple record sources refer to the same person before that person’s kinship connections can be analyzed.<sup>578</sup> Critically, Hatton identifies genealogy’s unique epistemic position: “Genealogy does not study identity—it proves it to study something else.”<sup>579</sup> This formulation repositions genealogy not as an archival hobby

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<sup>573</sup> De Groot, Jerome. (2015) *Consuming History: Historians and Heritage in Contemporary Popular Culture*. 2nd ed. Abingdon: Routledge. p. 103.

<sup>574</sup> NSW. (2022) Interviewed by S. Combs-Bennett. 6 July. Zoom.

<sup>575</sup> Rhoads. (1971) p. 83.

<sup>576</sup> Durie. (2017) *What is Genealogy op. cit.*

<sup>577</sup> Mills. (2002) *op. cit.*

<sup>578</sup> Hatton. *op. cit.*

<sup>579</sup> Hatton. *op. cit.* Hatton’s formulation that genealogy “does not study identity—it proves it to study something else” identifies the discipline’s distinctive epistemic function: establishing the evidential ground on which claims about kinship, heritage, and historical connection can be built. This is what distinguishes serious genealogical work from casual family

but as a rigorous methodology for establishing the evidential foundations on which historical and kinship analysis depends. The application review processes documented in this chapter—the processor expertise, the evidentiary standards, the correction protocols—represent this epistemic project in institutional form, translating abstract genealogical methodology into the practical decisions that determine community membership.

The expansion of organizational missions to encompass educational, historical, and social purposes beyond lineage verification reflects appropriate adaptation to the contemporary relevance question. SZ reflected on the historical function that these organizations served: “These organizations meant something different to women in the forties and fifties. We weren’t allowed to run for office. We weren’t allowed to really work on all kinds of things that gave us a sense of power, purpose, whatever.”<sup>580</sup> The civic space that hereditary organizations provided for women’s organizational leadership in an era of limited formal political participation was a genuine social function; as that particular function has become less distinctive, organizations have developed alternative value propositions in community service, historical education, and genealogical research support. Some members challenge conventional premises: “Why should I seek glory for what an ancestor has done?” and MK noted that family members who would qualify him were “individuals who owned other human beings,” making ancestral celebration unpalatable.<sup>581</sup> These perspectives do not invalidate organizational missions but identify the evolution in value proposition that contemporary organizations must articulate: the purpose is not ancestral glory but community belonging, historical education, and the ongoing project of making American history legible through documented family connections. SZ’s vision captures this potential: “maybe heritage groups could have some purpose in helping create that sense of identity that’s unifying.”<sup>582</sup>

## 7.7 Heritage Organizations Face Their Future

Analysis of institutional engagement and barriers reveals that hereditary organizations navigate complex tensions between maintaining traditional missions and adapting to contemporary expectations for accessibility, inclusivity, and social relevance. The barriers to participation document that exclusion operates through multiple mechanisms rather than single obstacles, requiring institutional responses that address both practical accessibility and cultural inclusion simultaneously.

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storytelling, and what makes the institutional verification processes documented in this chapter analytically coherent rather than merely bureaucratic.

<sup>580</sup> SZ. (2022) Interviewed by S. Combs-Bennett. 26 June. Zoom.

<sup>581</sup> R\_1GNrdBDXAkEbwKN. (2022) Study Survey [Unpublished Raw Data]; MK. (2022) Interviewed by S. Combs-Bennett. 1 July. Zoom.

<sup>582</sup> SZ. (2022) Interviewed by S. Combs-Bennett. 26 June. Zoom.

The persistence of discrimination patterns, particularly political exclusion at the interpersonal level, reflects broader societal divisions that challenge these organizations' capacity to serve as unifying forces around shared historical heritage. The intersection of political identity with genealogical practice creates a contemporary dynamic that heritage organizations must navigate by maintaining focus on their genealogical and educational missions rather than becoming extensions of partisan culture. Formal policy statements are necessary but insufficient; organizations must develop accountability mechanisms that ensure interpersonal compliance with inclusive norms at the chapter level.

The documentary gatekeeping function that defines hereditary organization membership creates structural barriers for populations whose ancestors were systematically excluded from colonial and early national record-keeping. These structural limitations differ analytically from intentional discrimination: the former reflects historical documentation patterns that organizations can work to mitigate through specialized research support, while the latter reflects contemporary failures that policy can and should prevent. The NSDAR's documented efforts—from bylaw revision to *Forgotten Patriots* to specialty research teams—demonstrate that organizations can take meaningful action within these structural constraints. The evidence presented in this chapter supports a measured assessment: contemporary hereditary organizations are making genuine and documented efforts toward inclusion, while persistent gaps between institutional policy and interpersonal culture indicate that this work is incomplete and requires sustained attention beyond policy adoption.

The sophistication of application review processes, the rigor of evolving documentation standards, and the institutional investment in genealogical accuracy documented in this chapter reflect the subculture's serious engagement with the genealogical mission at its foundation. The challenge for these organizations is to ensure that the barriers created by this commitment to rigor are genuinely necessary for genealogical accuracy rather than proxies for cultural gatekeeping. Where barriers are genuinely structural, reflecting the difficulty of historical documentation, organizations must redouble research support. Where barriers are interpersonal and reflect discrimination that policy prohibits, organizations must enforce their own stated values. The subsequent case studies of the National Society Daughters of the American Revolution and the General Society of Mayflower Descendants will examine how two prominent organizations address these contemporary challenges through specific policies, practices, and institutional innovations while maintaining their foundational commitments to genealogical accuracy and historical preservation.

## Chapter 8 Revolutionary Daughters and Modern Changes

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By the mid-1970s, the NSDAR was one of America's most well-known women's organizations, surpassing the membership of the League of Women Voters, the American Association of University Women (AAUW), and all other lineage organizations.<sup>583</sup> Over the past fifty years, that distinction has come and gone, but the NSDAR remains a recognizable household name in the United States.<sup>584</sup> Understanding its transformation from 1970 to 2020 requires positioning it within the broader genealogical ecosystem: the NSDAR is not representative of American genealogical practice broadly, but rather constitutes a specific, bounded subculture with distinctive characteristics, practices, and institutional culture that distinguishes it from commercial genealogical services, academic genealogists, African American genealogical communities, Mormon-influenced family history practice, and other hereditary organizations. Its members share not only a bloodline threshold for membership but also a particular orientation toward heritage, documentation, and civic identity that shapes how the organization has navigated fifty years of technological and social change.

Since its founding in 1890, the organization has embodied what Strange termed the “will to descend,” a powerful motivating force that drove women to claim Revolutionary lineage to assert both national belonging and civic authority.<sup>585</sup> Strange's analysis of the DAR's formative years reveals how the organization's founders “manipulated the meanings of Revolutionary lineage...in order to accomplish their overriding aim: to shape national political culture.”<sup>586</sup> This impulse to claim “politically potent artifacts for a contemporary descent community” distinguished hereditary organizations from other genealogical subcultures and established tensions that would persist throughout the organization's history.<sup>587</sup> The paradox Strange identifies, an organization simultaneously “inclusive and elitist, democratic and demonstrably exclusionary,” intensified during the transformative period examined in this study.<sup>588</sup> As technological change democratized access to genealogical records and social change challenged traditional assumptions about American heritage, the NSDAR navigated competing pressures to maintain exclusivity while projecting inclusivity. The evidence examined here was drawn from

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<sup>583</sup> National Society Daughters of the American Revolution. (2006) State of the Society. *Proceedings of the One Hundred Fifteenth Annual Continental Congress*. June; National Society Daughters of the American Revolution. (2015) Report of the President General. *Proceedings of the One Hundred Twenty-Fourth Annual Continental Congress*. 25 June. p. 17.

<sup>584</sup> Barboza, Maurice and Nash, Margo. (1997) The Fight to Belong: Story of the DAR. *Newsweek*. 12 May.; Trescott, Jacqueline. (1985) The Quest to Belong: Lena Ferguson's Fight for DAR Membership. *The Washington Post*. 20 April. p. C4. <https://www.proquest.com/>: accessed 22 April 2022.

<sup>585</sup> Strange, Carolyn. (2014) Sisterhood of Blood: The Will to Descend and the Formation of the Daughters of the American Revolution. *Journal of Women's History*. 26(3). p.107. <https://doi.org/10.1353/jowh.2014.0052>: accessed 16 October 2020. Strange is introduced and contextualized within the broader thesis argument in Chapter 1, Section 1.3.

<sup>586</sup> Strange (2014), *The Will to Descend*. *op. cit.* p. 107.

<sup>587</sup> Strange (2014), *The Will to Descend*. *op. cit.* p. 107.

<sup>588</sup> Strange (2014), *The Will to Descend*. *op. cit.* p. 105.

organizational proceedings, newspaper coverage, and original interview data, showing an institution that has made genuine, if uneven, efforts toward reform, and whose present-day practices cannot be reduced to its historical exclusions.

## 8.1 Historical Context and Organizational Identity

As documented in Chapter 2, the NSDAR was founded in Washington, D.C., in 1890 following the Sons of the American Revolution's formal decision to bar women from membership.<sup>589</sup> Six working women in Washington laid the foundation for the new organization on 29 July 1890, strategically selecting First Lady Caroline Scott Harrison as the inaugural President General, thereby securing social credibility and national press coverage from the outset.<sup>590</sup> The founding story is discussed in detail in Chapter 2, but what matters for this chapter is the structural legacy it established. A nationally scoped organization, a congressional charter that was procedurally routine but popularly misunderstood as federal endorsement,<sup>591</sup> and a bloodline-based membership requirement that simultaneously served as both gateway and barrier.<sup>592</sup>

The NSDAR's early decades demonstrate how women's organizations could effectively shape American public life while navigating complex social expectations. As Morgan demonstrates, women's patriotic organizations served dual purposes. They claimed national belonging through ancestral connection while asserting women's civic authority in an era when their political participation remained formally limited.<sup>593</sup> The founders' emphasis on "character building" reflects Morgan's identification of the intertwining of patriotism with women's broader struggles for recognition in American civic life.<sup>594</sup> Genealogy, Morgan observes, "joined manners, dress, foodways, and home furnishings in the toolboxes of Americans who wished to rise in society," suggesting that NSDAR membership offered middle-class women both social capital and a platform for civic engagement otherwise unavailable to them.<sup>595</sup> This dynamic explains why the NSDAR's membership has never mapped neatly onto a single social class, as the organization has always attracted women who found in Revolutionary lineage a resource for navigating their particular social circumstances. Whether those circumstances involved

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<sup>589</sup> For a full discussion of the SAR's exclusion of women and the NSDAR's founding, see Chapter 2, Section 2.3.

<sup>590</sup> National Society Daughters of the American Revolution. (n.d.) Founding of the DAR. *NSDAR Archives*. <https://www.dar.org/national-society/about-dar/dar-history/founding-dar>: accessed 12 December 2023.

<sup>591</sup> For the procedural history of congressional charters for District of Columbia organizations, see Chapter 2, Section 2.3. The NSDAR Act of Incorporation required filing proceedings annually with the Secretary of the Smithsonian Institution; this requirement continued until 2000 as the official Congressional record. Annual proceedings are still filed with the Smithsonian by the Reporter General.

<sup>592</sup> Strange (2014), *The Will to Descend*. *op. cit.* p. 105.

<sup>593</sup> Morgan (2005) *op. cit.* p. 12.

<sup>594</sup> Morgan (2005), *op. cit.* p. 12.

<sup>595</sup> Morgan (2005), *op. cit.* p. 5.

established wealth, professional aspiration, or navigating racial barriers within other women's organizations.

The organization's ideological positioning during the study period is inseparable from its social character. The 1972 change of the official motto from "Home and Country" to "God, Home, and Country," a modification that Wendt interprets as emphasizing the NSDAR's "staunch opposition to communism" and its "opposition of the 'atheist' Soviet Union," occurred simultaneously with the technological modernization described in the following section, demonstrating that ideological conservatism and institutional adaptation coexisted throughout the study period rather than operating as opposing forces.<sup>596</sup> Public perception of the NSDAR has long been more complex than the media stereotypes popularized by Peggy Anderson's 1974 work, *The Daughters*, which portrayed members as wealthy, socially conservative women resistant to change.<sup>597</sup> While the organization's early leadership drew heavily on women of means (before 1970, only the President General received even a modest stipend, with all other national officers bearing personal expenses during their three-year terms), substantial middle-class participation characterized the membership from its inception.<sup>598</sup> Women who joined the NSDAR were not simply claiming inherited status; they were actively constructing it, finding in Revolutionary ancestry a form of civic credibility that transcended their economic position. This class dynamic shaped the organization's internal culture throughout the study period and is central to understanding both its appeal and its ongoing tensions around accessibility.

## 8.2 Professionalism in Genealogy Verification and Digitization

The transformation of the NSDAR from a volunteer-dependent organization into a professionally staffed institution with sophisticated technological infrastructure represents a significant development in the organization's history. This transformation did not occur in a single decisive moment but rather unfolded across five decades in response to internal pressures for accuracy and external pressures from a rapidly changing technological environment. The result was an organization that developed proprietary systems, professional training programs, and documentation standards distinctive enough to constitute a genuine institutional subculture. One whose members learn to navigate shared systems, speak a shared vocabulary of patriot

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<sup>596</sup> Wendt. *op. cit.* p. 187.

<sup>597</sup> Anderson, Peggy. *op. cit.* p. 11.

<sup>598</sup> Morgan (2005), p. 5. Before 1970, only the President General received a modest stipend (barely sufficient to cover extensive national and international travel) while other board members served without compensation, bearing all personal expenses during their three-year terms. This structure meant that women with independent financial means were, by practical necessity, disproportionately represented in national leadership. The 1970s professionalization of staff, described in Section 8.2.1, began to shift this dynamic.

service and application procedure, and engage in a form of genealogical practice shaped by organizational requirements that exist nowhere else in the genealogical ecosystem.

### 8.2.1 Foundations of Professional Practice: The 1970s

The 1970s marked the NSDAR's first deliberate effort to transform genealogical verification from a loosely managed volunteer function into a professional operation with consistent standards. The impetus came from two directions simultaneously: the broader surge of public interest in genealogy sparked by the American Bicentennial and the television broadcast of *Roots*, which flooded the organization with new applications, and an internal reckoning with the consequences of insufficient verification. As Dohn reported in 1951, "The DAR has learned from bitter experience the importance of checking carefully the pedigree of society applicants. It embarrassingly admits having admitted to membership a woman whose ancestors were Tories."<sup>599</sup> Such incidents made clear that the organization's credibility as a hereditary society depended on the integrity of its genealogical review, a realization that drove a decade of institutional reform.

The concrete changes of the early 1970s reflected this new seriousness of purpose. The 1971 establishment of the Betty Newkirk Seimes Microfilm Center represented what contemporary observers called "one giant step" in modernizing genealogical research methods, making the organization's holdings systematically accessible to staff and researchers for the first time.<sup>600</sup> The following year, the creation of a dedicated lineage corrections department, led by a Certified Genealogist, positioned the NSDAR at the forefront of a genealogical profession that, as documented in Chapters 2 and 3, was simultaneously developing formal credentialing structures. At the same time, application forms were revised to standardize date formats, a small but telling intervention that acknowledged how seemingly minor inconsistencies, a month recorded numerically in one format by one member, differently by another, could undermine documentary reliability across thousands of records.<sup>601</sup> A partnership with the LDS Church enabled the microfilming of all published and unpublished material in the library, connecting the NSDAR to the emerging infrastructure of modern genealogical preservation discussed in Chapter 3, while the organization's 1973 emergency resolution opposing the closure of census

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<sup>599</sup> Dohn, Norman H. (1951) Meeting Your Ancestors. Columbus Sunday Dispatch Magazine. 21 October. p.145-146. <https://www.genealogybank.com/>: accessed 12 March 2021.

<sup>600</sup> National Society Daughters of the American Revolution. (1971) Report of Librarian General. *Proceedings of the Eightieth Annual Continental Congress*. 20 April. p. 73. For the broader context of genealogical professionalization during this period, including the development of the Board for Certification of Genealogists and the National Genealogical Society, see Chapters 2 and 3.

<sup>601</sup> National Society Daughters of the American Revolution. (1973) Report of Genealogical Records Committee. *Proceedings of the Eighty-Second Annual Continental Congress*. 18 April. p. 184.

records to the public demonstrated an early awareness that access to primary sources was foundational to the kind of documented lineage verification it was developing.<sup>602</sup>

The decade also saw the creation of the Volunteer Genealogist (VG) program, which enabled trained members to review supplemental applications during annual Continental Congress sessions. By 1980, 189 volunteers from twenty-six states were assisting with supplemental paper examinations.<sup>603</sup> The significance of this program extended beyond workload management. By embedding verification within a community of member-practitioners rather than delegating it entirely to paid staff, the NSDAR created a distinctive organizational character that set it apart from commercial genealogical services and positioned genealogical competency as a form of organizational citizenship.<sup>604</sup> Members who trained as Volunteer Genealogists became local resources for prospective applicants, creating a distributed network of expertise that reinforced the NSDAR's subcultural identity as a community bound by shared genealogical knowledge and descent.

### 8.2.2 Strategic Modernization: The 1980s

If the 1970s established the principle of professional genealogical practice within the NSDAR, the 1980s consolidated it into institutional infrastructure. By 1985, the Registrar General's office employed forty-two staff members across four departments, with one-third of all headquarters employees working in genealogy-related roles by 1984.<sup>605</sup> This expansion reflected a deliberate recognition that hereditary organizations require specialized expertise that general administrative staff cannot provide, and that evaluating a Revolutionary War patriot's service record against standardized criteria demands knowledge that must be cultivated rather than assumed. The creation of dedicated positions for a full-time Corrections Genealogist and a New Ancestor Genealogist acknowledged that different types of genealogical work are genuinely distinct: correcting errors in previously approved lineages requires diplomatic skill alongside research ability, since discovering problems in an accepted application can affect

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<sup>602</sup> National Society Daughters of the American Revolution. (1971) Report of Historian General. *Proceedings of the Eightieth Annual Continental Congress*. 20 April. p. 72; National Society Daughters of the American Revolution. (1973) Report of DAR Membership Commission. *Proceedings of the Eighty-Second Annual Continental Congress*. 18 April. p. 188. For the LDS Church's genealogical preservation program and the broader infrastructure of modern genealogical research, see Chapter 3, Section 3.2.

<sup>603</sup> National Society Daughters of the American Revolution. (1981) Report of the DAR Patriot Index Committee. *Proceedings of the Ninetieth Annual Continental Congress*. 2 May. p. 317.

<sup>604</sup> The VG program reflected the same hybrid of volunteerism and professional expertise emerging across women's organizations during the 1970s, as second-wave feminism created new expectations for women's civic roles. The NSDAR's approach distinguished it from commercial genealogical services by embedding verification within the membership community rather than delegating it entirely to paid staff.

<sup>605</sup> National Society Daughters of the American Revolution. (1985) Report of DAR Family Tree Genetics Project. *Proceedings of the Ninety-Fourth Annual Continental Congress*. 18 April. p. 245; Farrell, William E. and Warren, Waver Jr. (1984) Briefing: A Genetics Project. *The New York Times*. 11 December. p. B12. <https://nyti.ms/3TxI5k2>: accessed 15 March 2021.

multiple current members who joined through the same ancestor, while evaluating proposed new patriots demands thorough knowledge of Revolutionary-era records and the capacity to assess whether documentary evidence meets organizational standards.<sup>606</sup>

Documentation standards evolved in tandem with the expanding staff. The 1986 publication of *Is That Service Right?* provided clear criteria for acceptable military, civil, and patriotic service, giving chapter registrars and applicants alike a shared reference point for what the organization would and would not accept.<sup>607</sup> New requirements for birth certificates listing parents' names reflected the growing awareness, within both the NSDAR and the broader genealogical community, that documentation standards matter not just for individual applications but for the long-term credibility of the entire membership record.<sup>608</sup> These efforts positioned the NSDAR within the broader professionalization of genealogical practice occurring across the 1980s, with professional genealogists increasingly emphasizing source citation and evidence evaluation; hereditary organizations faced pressure to align their requirements with emerging best practices. The NSDAR's challenge, calibrating standards rigorous enough to maintain scholarly credibility while remaining achievable for members without professional research training, was one that no commercial service or academic institution faced in quite the same form, making the organization's solutions genuinely novel contributions to the practice of genealogical verification.

### 8.2.3 Digital Transformation: The 1990s and 2000s

The arrival of the Internet era reshaped the NSDAR's technological infrastructure as decisively as the professionalization of the 1970s had reshaped its staffing. The organization's entry into the digital age was neither immediate nor seamless, but its trajectory over two decades moved steadily toward integration, accessibility, and speed. In 1995, ancestor data was transferred to a newly developed Ancestor Retrieval System, enabling staff to verify proposed ancestors and identify connections between applications, tasks that had previously required manual searching through physical files.<sup>609</sup> The introduction of NSDAR-developed software for both DOS and Mac systems, proprietary tools designed for the organization's specific application requirements, standardized formats, and the simultaneous requirement that chapters develop new technical capacities created a recurring tension in the NSDAR's digital transition between

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<sup>606</sup> National Society Daughters of the American Revolution. (1985) Report of DAR Family Tree Genetics Project. *Proceedings of the Ninety-Fourth Annual Continental Congress*. 18 April. p. 245.

<sup>607</sup> National Society Daughters of the American Revolution. (1986) State of the Society. *Proceedings of the Ninety-Fifth Annual Continental Congress*. 14 April. p. 28.

<sup>608</sup> National Society Daughters of the American Revolution. (1989) Report of Registrar General. *Proceedings of the Ninety-Eighth Annual Continental Congress*. 18 April. p. 189.

<sup>609</sup> National Society Daughters of the American Revolution. (1996) Report of President General. *Proceedings of the One Hundred Fifth Annual Continental Congress*. 15 April. p. 9.

what headquarters envisioned and what volunteer chapter registrars could practically implement.<sup>610</sup>

By 1998, a local-area network connected organizational departments to shared databases, and the Registrar General's office was formally renamed "Registrar General Record Information" to reflect the expanding scope of its work beyond simple membership registration to comprehensive information management.<sup>611</sup> The iMIS System, introduced in 1999, brought integrated application tracking to an organization that had managed this work through disconnected paper processes for over a century.<sup>612</sup>

The 2000s brought the most ambitious single project in the organization's technological history: the "Preserving Our Family Tree" initiative, which digitized over 805,000 applications and 167,000 supplementals, records dating back to the organization's founding in 1890.<sup>613</sup> Completed ahead of schedule and under budget, the project transformed the NSDAR's relationship to its own archival holdings, making accessible a genealogical resource of extraordinary depth and converting fragile paper records into durable digital form. The 2005 implementation of the OnBase Software System for electronic document management and workflow automation changed how applications moved through the verification process, reducing handling and enabling staff to track applications at every stage.<sup>614</sup> Most consequentially for members and prospective applicants, the 2006 launch of the NSDAR Genealogical Research System (GRS) reduced application processing times from thirteen weeks to approximately six weeks by 2007, bringing the organization's responsiveness closer to the digital efficiency expectations of a new generation of prospective members.<sup>615</sup> These improvements were not merely administrative conveniences; they changed the experience of applying to the NSDAR in ways that made the organization more accessible to applicants who lacked the patience for paper-based processes or the social networks to navigate an opaque system.

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<sup>610</sup> National Society Daughters of the American Revolution. (1999) Report of Registrar General. *Proceedings of the One Hundred Eighth Annual Continental Congress*. 19 April. p. 19. Proprietary NSDAR software was developed to enforce application formatting conventions and required data fields that commercial genealogical programs did not accommodate.

<sup>611</sup> National Society Daughters of the American Revolution. (2002) Report of the President General. *Proceedings of the One Hundred Eleventh Annual Continental Congress*. 15 April. p. 26.

<sup>612</sup> National Society Daughters of the American Revolution. (1999) Report of Registrar General. *Proceedings of the One Hundred Eighth Annual Continental Congress*. 19 April. p. 19. iMIS was a commercially available membership management system adapted for the NSDAR's specific application tracking requirements.

<sup>613</sup> National Society Daughters of the American Revolution. (2003) Volunteer Information Specialists. *Proceedings of the One Hundred Twelfth Annual Continental Congress*. 11 July. p. 206; National Society Daughters of the American Revolution. (2003) Director of Information Systems. *Proceedings of the One Hundred Twelfth Annual Continental Congress*. 11 July. p. 206.

<sup>614</sup> National Society Daughters of the American Revolution. (2006) State of the Society. *Proceedings of the One Hundred Fifteenth Annual Continental Congress*. June.

<sup>615</sup> National Society Daughters of the American Revolution. (2017) DAR Network Appendix C. *Proceedings of the One Hundred Twenty-Sixth Annual Continental Congress*. July. p. 279.

### 8.2.4 Innovation and Accessibility: The 2010s

The 2010s saw the NSDAR move from digitizing existing processes to redesigning them around digital tools. The 2012 launch of a comprehensive online Genealogical Education Program (GEP) addressed a persistent challenge that no amount of staff expansion or software development could fully resolve: the highly variable genealogical knowledge of applicants. Unlike professional genealogical societies whose members typically possess research training before joining, the NSDAR drew members whose primary qualification was descent from a Revolutionary-era patriot rather than expertise in historical research. The GEP created a structured pathway for members to develop genealogical skills, and by 2016, over 4,100 NSDAR members had completed the training, simultaneously improving application quality and fostering a community of knowledgeable practitioners at the chapter level who could assist prospective members with their research.<sup>616</sup> This educational infrastructure reinforced the NSDAR's subcultural distinctiveness in that members who completed the GEP did not simply learn generic genealogical methods but were trained in the organization's specific documentation requirements, creating a cadre of practitioners fluent in the NSDAR's particular institutional language.

By 2015, the indexing of over sixty-six million names reflected the scale of what digital tools had made possible, while the 2014 acceptance of DNA evidence for applications marked a conceptual as well as technological evolution, the acknowledgment that genetic testing had become a legitimate instrument of genealogical proof, a development discussed in broader context in Chapter 3.<sup>617</sup> The launch of electronic applications (eApps) in 2016 completed the transition to a fully digital application process, eliminating paper forms, reducing transcription errors, and enabling real-time tracking of application status by both applicants and chapter registrars.<sup>618</sup> The VG program, whose in-person sessions had been a fixture of annual Continental Congress gatherings for decades, transitioned to a virtual format during this decade, expanding the program's reach to members who could not travel to Washington and reinforcing the organization's commitment to distributed, member-driven genealogical expertise.<sup>619</sup>

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<sup>616</sup> National Society Daughters of the American Revolution. (2017) DAR Network Appendix C. *Proceedings of the One Hundred Twenty-Sixth Annual Continental Congress*. July. p. 279.

<sup>617</sup> National Society Daughters of the American Revolution. (2014) State of the Society. *Proceedings of the One Hundred Twenty-Third Annual Continental Congress*. June; National Society Daughters of the American Revolution. (2015) Lineage Research Appendix C. *Proceedings of the One Hundred Twenty-Fourth Annual Continental Congress*. June. p. 334. For the broader societal adoption of direct-to-consumer DNA testing and its implications for genealogical communities, see Chapter 3, Section 3.5.

<sup>618</sup> National Society Daughters of the American Revolution. (2017) DAR Network Appendix C. *Proceedings of the One Hundred Twenty-Sixth Annual Continental Congress*. July. p. 279. By 2019, the organization had processed 292 eApps and continued adding enhancements for registrars and chapters.

<sup>619</sup> The virtual transition of the VG program is confirmed through the organizational progression evident in proceedings from 2015 to 2020; it is not documented in a single annual report.

Taken together, the technological evolution documented across these four decades illuminates what it means for the NSDAR to function as a bounded subculture within the larger genealogical ecosystem. The organization did not simply adopt available technologies; it adapted them to requirements that exist nowhere else, requirements shaped by the intersection of genealogical scholarship, organizational tradition, and the practical realities of a membership organization whose applicants range from professional researchers to enthusiastic beginners. The result is an institutional culture whose members share not only an ancestor but a common fluency in systems, standards, and practices that distinguish them from every other genealogical community.

### 8.3 Membership Development and Documentation Standards

The NSDAR's history of documentation standards and membership trends is not two separate stories but rather facets of the same institutional development. How the organization defined acceptable evidence for lineage has always shaped who could join, and who joined in turn shaped the organization's relationship to the communities and challenges it encountered. The two subsections that follow trace these intertwined histories: the progressive formalization of documentation requirements from the late nineteenth century through the digital present, and the fluctuations in membership that reflect both the organization's responses to social change and its ongoing efforts to remain relevant to each new generation of potential members.

#### 8.3.1 Evolution of Documentation Requirements

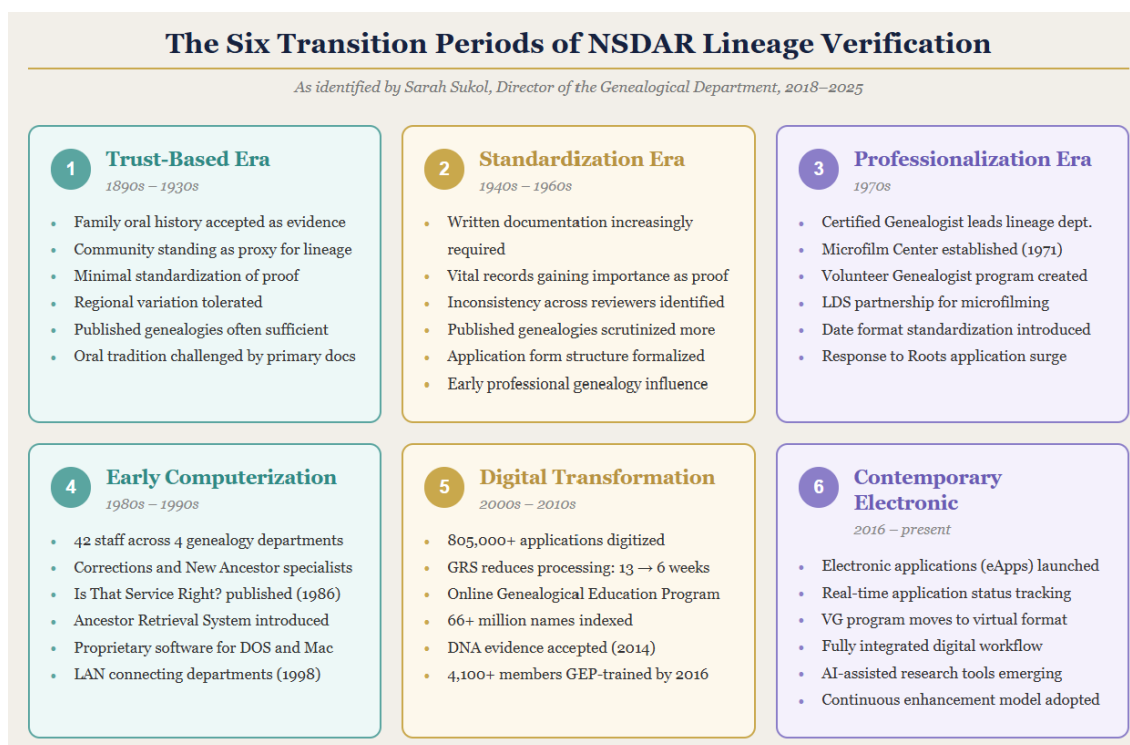
The organization's early approach to membership verification reflected the limitations and assumptions of the late nineteenth century, when family oral tradition was considered a reasonable basis for lineage claims and the distance from the Revolutionary era was still close enough that living relatives might carry personal memory of patriot ancestors. As early as 1897, however, this trust-based system was already producing regional tensions. Annie White Mell, an Alabama state officer, advocated in the *American Monthly Magazine* for more lenient documentation standards, arguing that officers should "be less exacting in the rules that strictly require printed or official proof of the ancestor's service when other evidence of nearly equal importance can be obtained."<sup>620</sup> Her appeal reflected the real difficulty that Southern applicants faced in documenting ancestors whose records had been disrupted by the Civil War and

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<sup>620</sup> Mell. *op.cit.* p. 31.

Reconstruction, but it also revealed how oral tradition and community standing had served as substitutes for documentary evidence, a practice the organization was only beginning to question.

The progression from that trust-based system to the rigorous documentation standards of the twenty-first century can be understood through six key transition periods identified by Sarah Sukol, Director of the Genealogical Department from 2018 to 2025, and depicted in Figure 40.<sup>621</sup> These transitions correspond not only to evolving genealogical research trends in the broader genealogy community but also to the technological advances documented in Section 8.2. What consistently drove the transitions was evidence that oral tradition and published family histories were unreliable. As oral histories were checked against primary documents in archives, courthouses, and libraries, they often proved inaccurate, and as the volume of applications grew, the consequences of accepting undocumented lineages multiplied accordingly. The shift toward rigorous documentation was thus not bureaucratic caution for its own sake, but a response to the failures of the alternative demonstrated.



**Figure 40:** *The Six Transition Periods of NSDAR Lineage Verification, 1890s–Present. Each period reflects the interaction between internal organizational pressures for documentary accuracy and external developments in genealogical practice, archival access, and technology. The progression from oral tradition and community standing as acceptable proof to fully electronic, DNA-inclusive verification represents one of the most significant transformations within the hereditary organization subculture during the study period.*

<sup>621</sup> Sukol, Sara Louise. (2019) A History of Changes in DAR Documentation Requirements. NGS Magazine. 45(2). pp.20-26. The six transition periods depicted in Figure \_\_ are: (1) the trust-based era (1890s–1930s); (2) the documentation standardization period (1940s–1960s); (3) the professionalization era (1970s); (4) early computerization (1980s–1990s); (5) digital transformation (2000s–2010s); and (6) the contemporary electronic era (2016–present).

Interviewee AA's account of reviewing a 1920s cousin's application under the same patriot ancestor captures this generational shift with clarity. That earlier application was, she observed, "just not sourced enough. It seemed like she had been handed down history from a grandparent...it was not the same" as what modern applicants are required to submit.<sup>622</sup> The contrast is visible in the organizational archives: an application from the 1920s consists largely of handwritten assertions; a contemporary application requires source citations for every generational link, documentary evidence for births, deaths, and marriages, and proof that the patriot ancestor's service meets established criteria. The transformation is not simply procedural. It represents a fundamental reconception of what it means to prove descent, one that aligns the NSDAR's standards with the broader genealogical community's shift toward evidence-based practice, while imposing requirements specific to the organization's own history and institutional needs.

### 8.3.2 Membership Trends and Organizational Resilience

The NSDAR's membership history between 1970 and 2020 is a story of peaks, pressures, and persistent adaptation, one that cannot be read apart from the broader social transformations reshaping American women's civic participation across the same decades. Growth and decline followed the rhythms of genealogical enthusiasm and changing gender roles, but the organization's responses to demographic challenge reveal an institutional resilience that mere membership numbers do not fully capture (Figure 41).

The 1970s were years of genuine growth, with membership rising from 189,295 in 1969 to 202,039 in 1976 on the strength of genealogical enthusiasm generated by the American Bicentennial and the cultural phenomenon of *Roots*, as documented in Chapter 3.<sup>623</sup> The Registrar General's 1976 report reiterated that genealogy had become the third most popular hobby in the United States, a finding widely reported in newspapers, and the NSDAR was well positioned to benefit, maintaining a robust junior members program in which younger women consistently comprised 25–30 percent of new admissions during this period (Figure 42).<sup>624</sup> The 1980s brought the organization to its peak and then to its first sustained reversal. Membership reached 211,342 in 1984, but by 1989 the organization had lost 2,369 members in a single year,

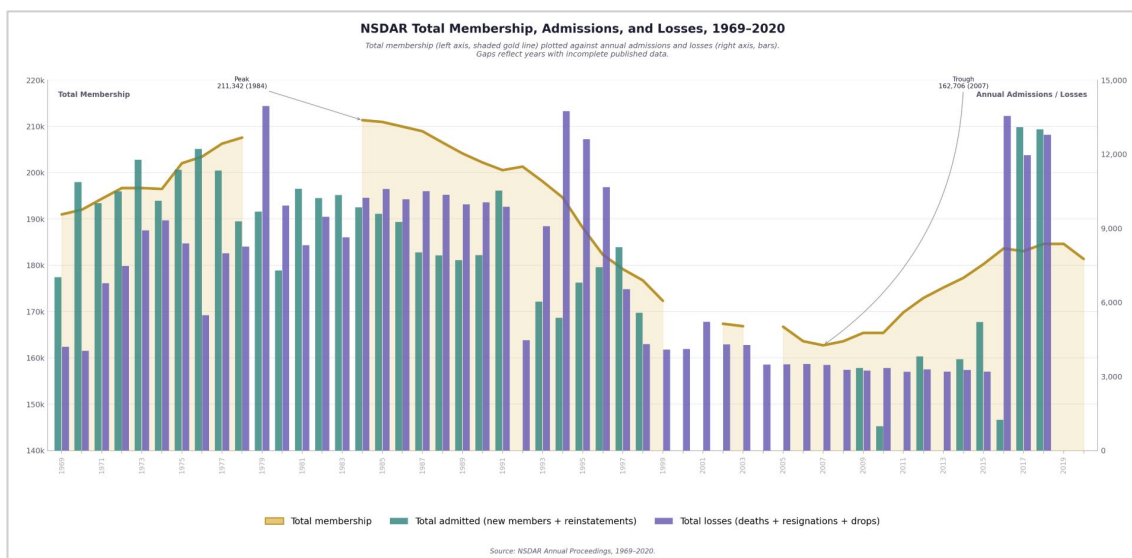
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<sup>622</sup> AA (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>623</sup> National Society Daughters of the American Revolution. (1970) Report of Historian General. *Proceedings of the Seventy-Ninth Annual Continental Congress*. 21 April. p. 73. For the impact of *Roots* and the Bicentennial on genealogical interest in this period, see Chapter 3, Section 3.3.

<sup>624</sup> The Registrar General's 1976 report reiterated that genealogy had become the third most popular hobby in the United States, a finding reported widely in newspapers of the period. National Society Daughters of the American Revolution. (1976) Report of Registrar General. *Proceedings of the Eighty-Fifth Annual Continental Congress*. 19 April.

a decline that reflected forces well beyond the NSDAR’s control.<sup>625</sup> By 1988, 75 percent of women aged 25–54 were either employed or seeking employment, fundamentally altering the availability landscape for voluntary organizations built on assumptions of women’s domestic availability.<sup>626</sup> The time required to research a lineage, prepare an application, and participate in chapter activities was simply harder to find, and organizations that could not adapt their demands to working women’s schedules faced structural attrition.



**Figure 41:** NSDAR Total Membership, Annual Admissions, and Annual Losses, 1969–2020. The gold line (left axis) traces total membership over the study period, rising to a peak of 211,342 in 1984, then declining to a trough of 162,706 in 2007, and recovering to approximately 184,622 by 2019. Teal bars show total annual admissions (new members plus reinstatements); purple bars show total annual losses (deaths, resignations, and drops), both plotted against the right axis. The convergence of admissions and losses during 1975–1976, 1979–1980, 1987–1988, and 1994–1996 corresponds to the membership decline periods discussed in Section 8.3.2. Gaps reflect years for which the annual proceedings did not publish complete membership data. Source: NSDAR Annual Proceedings, 1969–2020.

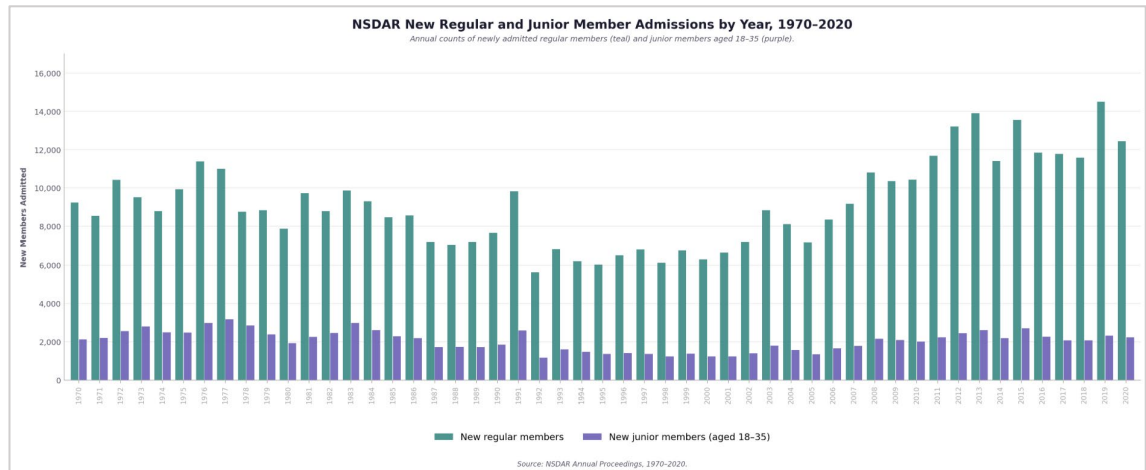
The 1990s intensified these pressures, with membership declining from 202,197 in 1990 to 172,319 by 1999, a loss of nearly 30,000 members over the decade.<sup>627</sup> The organization’s strategic response was to adapt its format rather than simply appeal for loyalty. The creation of “Working Women Chapters” with a “DAR...The One Hour Way” approach offered a model of participation calibrated to the time constraints that employed members faced, prioritizing

<sup>625</sup> National Society Daughters of the American Revolution. (1984) Report of Registrar General. *Proceedings of the Ninety-Third Annual Continental Congress*. 17 April. p. 75; National Society Daughters of the American Revolution. (1989) Report of Registrar General. *Proceedings of the Ninety-Eighth Annual Continental Congress*. 18 April. p. 189. Membership figures are also recorded in the DAR Proceedings data compiled for this study

<sup>626</sup> National Society Daughters of the American Revolution. (1988) Report of Librarian General. *Proceedings of the Ninety-Seventh Annual Continental Congress*. 18 April. p. 51.

<sup>627</sup> Figures derived from NSDAR annual proceedings for 1990 and 1999.

efficiency without abandoning the organizational functions that gave chapters their meaning.<sup>628</sup> A 2002 report that 68 percent of members were over sixty-five underscored the demographic urgency. Without younger members, the organization faced not just decline but the prospect of generational discontinuity.<sup>629</sup> The production of the *Today's DAR* recruitment video and the development of specialized chapters for young homemakers and working women were among the concrete responses to this recognition.



**Figure 42:** NSDAR New Regular and Junior Member Admissions by Year, 1970–2020. Teal bars show annual new regular member admissions; purple bars show annual new junior member admissions (members aged 18–35). Junior members consistently accounted for approximately 20–25 percent of new admissions throughout the study period, with the proportion remaining broadly stable despite fluctuations in total admissions across the five decades. Notable surges in both categories align with the genealogical enthusiasm generated by the American Bicentennial (1975–1976), the television broadcast of *Roots* (1977), and the genealogical television programming of the 2010s. Source: NSDAR Annual Proceedings, 1970–2020.

The 2010s brought a reversal of the declining trend, with membership growing from approximately 170,000 in 2010 to over 185,000 by the decade’s end, culminating on 5 October 2019 when the NSDAR surpassed one million cumulative members since its founding. A milestone marked by the selection of Amy Dickinson, a nationally syndicated advice columnist, as the millionth member.<sup>630</sup> The “America 250! Task Force,” created in 2017 with an ambitious goal of reaching 250,000 active members by 2033, positioned the organization within the national narrative around the upcoming semi-quincentennial in ways that echoed its prominent role in the Bicentennial celebrations of the 1970s.<sup>631</sup> These membership numbers are more than

<sup>628</sup> National Society Daughters of the American Revolution. (1996) Report of President General. *Proceedings of the One Hundred Fifth Annual Continental Congress*. 15 April. p. 9.

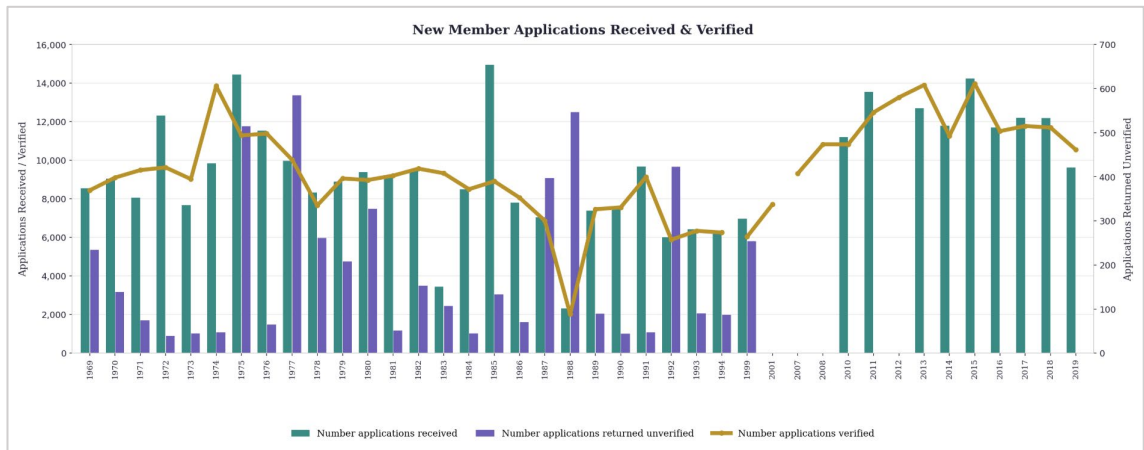
<sup>629</sup> National Society Daughters of the American Revolution. (2002) Report of the President General. *Proceedings of the One Hundred Eleventh Annual Continental Congress*. 15 April. p. 26.

<sup>630</sup> National Society Daughters of the American Revolution. (2015) Report of the President General. *Proceedings of the One Hundred Twenty-Fourth Annual Continental Congress*. 25 June. p. 17; Putnam, Amy Dickinson. (2019) The DAR’s One Millionth Member. *Today’s DAR Blog*. October. <https://blog.dar.org/>; accessed 22 October 2019.

<sup>631</sup> National Society Daughters of the American Revolution. (2017) 250th Commission. *Proceedings of the One Hundred Twenty-Sixth Annual Continental Congress*. 1 July. p. 222.

organizational statistics; they reflect the success or failure of the documentation standards and recruitment investments described across this chapter. ME, who joined as a junior member in her mid-twenties, observed the sustained institutional effort behind this trajectory: “DAR has really done membership drive after membership drive, like figuring out how do we retain members? How do we get new members? How do we talk to the people in their twenties and thirties...to get them to join instead of joining at age 60 or 70.”<sup>632</sup>

The data on application trends, depicted in Figure 43, confirm an additional dimension of this story.<sup>633</sup> The number of applications approved has remained roughly equal to those submitted across most of the study period, and the rate of unverified application returns, cases where prospective members failed to correct errors within the allotted time or submitted lineages with unfixable documentation problems, has declined significantly over time.<sup>634</sup> This pattern suggests that chapter registrars successfully implemented the documentation training described in Sections 8.2 and 8.3.1. If training had failed and applicants continued submitting poorly documented lineages, the data would show substantially more returned applications. The improving application quality visible in the data is, in this sense, a measure of the entire documentation infrastructure the organization built across fifty years.



**Figure 43:** Changes in Successful and Unsuccessful New Member Applications to the NSDAR, 1969–2019. Teal bars show total applications received; purple bars show applications returned unverified (right axis). The gold line tracks the number of applications successfully verified each year. Gaps in the chart reflect years for which the annual proceedings did not publish complete data; data on applications returned unverified is not available after 1999. Notable anomalies include the 1975 and 1988 spikes in unverified returns, the 1983 and 1988 troughs in applications received, and the sustained growth in applications received from 2010 onward. Source: NSDAR Annual Proceedings, 1969–2019.

<sup>632</sup> ME (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>633</sup> The years 1995–1998 and 2000–2009 are largely absent from the published proceedings data; total applications received are available for 2001, 2007, and 2008 only.

<sup>634</sup> Data on unverified application returns in the published proceedings stops in 2000. The interpretation offered here is based on available trend data for 1970–2000.

#### 8.4 Strategic Planning Versus Organizational Tradition

The institutional modernization and membership evolution described in the preceding sections did not unfold in a stable organizational environment. Between 1970 and 2020, the NSDAR simultaneously navigated the internal demands of professionalization and the external pressures of social change, producing a governance history marked by genuine reform alongside genuine resistance. As DuLong observes, the limited macro-level research on genealogical organizations makes the NSDAR's adaptation particularly significant for understanding how traditional institutions respond to change, and the organization's record during this period offers evidence of both successful adaptation and the structural limits of institutional transformation.<sup>635</sup>

The clearest marker of governance evolution was the progressive tightening of verification standards. The 1975 implementation of requirements for birth and marriage certificates covering the first three generations of applicants represented a decisive break from the earlier trust-based model, formalizing in policy what the professionalization of staff had established in practice: that an applicant's word, however confidently offered, was not sufficient evidence of the lineages the organization was certifying.<sup>636</sup> The 1980s tested this commitment under pressure. *The New York Times* documented significant conflicts during President General Sarah King's term, including allegations of discrimination in admissions practices and internal dissent that reflected how deeply contested the organization's direction had become.<sup>637</sup> The establishment of an ethics committee in 1984 to investigate allegations of discrimination demonstrated the organization's willingness to create institutional structures for accountability, even when doing so generated controversy, a theme developed in detail in Section 8.5.<sup>638</sup>

The challenge that emerged in 1989, when the NSDAR discovered that it had admitted twenty members based on a problematic pension record, illustrates the ongoing tension between the organization's commitment to rigorous standards and the practical difficulties of consistently applying them across a large, distributed membership.<sup>639</sup> The NSDAR's response reflected its institutional culture. Rather than removing the affected members, the organization maintained its policy of never rescinding membership once granted, instead encouraging affected members to establish their eligibility through supplemental lineages. The controversy surrounding President General King's proposal to add "legitimate" before "descendant" in membership

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<sup>635</sup> DuLong, John Patrick. (1986) *Genealogical Groups in a Changing Organizational Environment: From Lineage to Heritage*. PhD Dissertation, Wayne State University. p. 29. <https://m.library.wayne.edu/>; accessed 15 September 2021.

<sup>636</sup> National Society Daughters of the American Revolution. (1975) Report of Registrar General. *Proceedings of the Eighty-Fourth Annual Continental Congress*. 15 April. p. 120.

<sup>637</sup> ——. (1984) D.A.R.'s President is Fighting Dissent: She Calls News Conference to Deny Abusing Power and Bias Against Blacks. *The New York Times*. 8 April. p. 31. <https://nyti.ms/3xavpGc>; accessed 13 May 2021.

<sup>638</sup> National Society Daughters of the American Revolution. (1984) Report of Registrar General. *Proceedings of the Ninety-Third Annual Continental Congress*. 17 April. p. 75.

<sup>639</sup> National Society Daughters of the American Revolution. (1989) Report of Registrar General. *Proceedings of the Ninety-Eighth Annual Continental Congress*. 18 April. p. 189.

requirements proved equally revealing. Critics argued that the change could exclude African American members whose ancestors had been in relationships deemed illegal under historical law, and the bylaw proposal was ultimately dropped, a decision that members today cite as a point of organizational pride, noting that many lineage societies do maintain legitimate descent as a requirement.<sup>640</sup> That the NSDAR chose otherwise distinguished it meaningfully from comparable organizations and signaled a conception of inclusive membership that its subsequent history would continue to develop and test.

By the late 1980s, the NSDAR had begun implementing formal strategic planning processes, marking a departure from the more intuitive decision-making that had characterized earlier decades and reflecting broader trends in nonprofit management as heritage organizations adapted to increasing organizational complexity.<sup>641</sup> New training initiatives, including the Membership Promotion Workshop Committee, which conducted workshops in every state, accompanied this shift, creating a coordinated approach to recruitment and retention that replaced earlier reliance on chapter-level initiatives.<sup>642</sup> The cumulative effect of these governance reforms was an organization more self-consciously institutional in character, more aware of itself as a managed entity with strategic objectives, while remaining rooted in the hereditary membership requirement and the traditions of chapter life that had defined the NSDAR from its founding.

### 8.5 Progress, Resistance, and Reconciliation

No dimension of the NSDAR's history between 1970 and 2020 is more important, or more frequently misunderstood, than its relationship with race and inclusion. The organization carries a well-documented legacy of racial exclusion, most visibly in the 1939 refusal to allow Marian Anderson to perform at Constitution Hall, an incident that has become so dominant in public perception that it often crowds out recognition of the organization's subsequent institutional evolution. Understanding that evolution requires tracing it in detail, from the complexity of the founding era's racial dynamics through the landmark integration cases of the 1970s and 1980s to the programmatic efforts and ongoing tensions of the present. What emerges is not a story of an irredeemably exclusionary institution, nor of a seamlessly reformed one, but of an organization genuinely grappling with a difficult inheritance while making measurable,

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<sup>640</sup> National Society Daughters of the American Revolution. (1990) Report of Registrar General. *Proceedings of the Ninety-Ninth Annual Continental Congress*. 14 April. p. 68. The bylaw proposed to add "legitimate" before "descendant" arose directly during the controversy surrounding Lena Ferguson's application, described in Section 8.5.2.

<sup>641</sup> National Society Daughters of the American Revolution. (1988) Report of Ellis Island Restoration Committee. *Proceedings of the Ninety-Seventh Annual Continental Congress*. 20 April. p. 266.

<sup>642</sup> National Society Daughters of the American Revolution. (1988) Report of Librarian General. *Proceedings of the Ninety-Seventh Annual Continental Congress*. 18 April. p. 51.

documented progress toward the inclusive membership that its stated principles have always formally required.

The organization's founding-era racial dynamics were more complex than its later reputation suggests. *The New York Times* reported in 2012 that the NSDAR admitted a woman of mixed "American Indian and Black" heritage in the 1890s, a detail that complicates any simple narrative of early racial exclusion.<sup>643</sup> This early inclusion contrasts sharply with the increasingly restrictive racial boundaries that characterized American institutional life in the early twentieth century, as the organization's development paralleled other institutional efforts at racial classification, including Bureau of Indian Affairs blood quantum determinations and Jim Crow legislation.<sup>644</sup> The mid-twentieth century brought the first sustained scholarly challenge to the organization's exclusionary practices. In 1943, C.G. Woodson published an article rebuking the organization's elitism and prejudices, providing detailed evidence of African American Revolutionary War service and calling for African American women to join the NSDAR.<sup>645</sup> His challenge coincided with the early stages of the Civil Rights Movement and the growing questioning of racial exclusion across American institutions. As Teachout notes, "A handful of African American and Native American women applied and were admitted, despite little enthusiasm from the National Board."<sup>646</sup> This early pattern of grudging national-level acceptance, while maintaining local chapter autonomy over membership decisions, would directly shape the more visible integration struggles that followed.

### 8.5.1 Karen Batchelor

The admission of Karen Batchelor as the organization's first acknowledged African American member in 1977 marked a critical moment in the NSDAR's history, one that revealed simultaneously how far the organization had come from the 1912 President General's statement supporting "the purity of our Caucasian blood" and "the perpetuity of our Anglo-Saxon traditions," and how much informal resistance remained embedded in local chapter culture.<sup>647</sup> Batchelor's story is, in many ways, a story about genealogical competence as a form of

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<sup>643</sup> Nir, Sarah Maslin. (2012) For Daughters of the American Revolution, A New Chapter. *The New York Times*. 3 July. <https://nyti.ms/LX1GX7>; accessed 22 January 2021. Subsequently verified: the member admitted in the 1890s was Eunice Russ Ames Davis, whose father Prince Ames is documented in *Forgotten Patriots* as being of African, Native American, and European descent. See National Society Daughters of the American Revolution. (n.d.) *The Real Daughters of the American Revolution*. NSDAR.

<sup>644</sup> Hill, Megan, et al. (2022) Blood and Quantum Sovereignty. *Native Governance Center*. March. <https://nativegov.org/resources/blood-quantum-and-sovereignty-a-guide/>; accessed 10 December 2024.

<sup>645</sup> Woodson, C.G. (1943) Negro Women Eligible to be Daughters of the American Revolution. *Negro History Bulletin*. 7(2). p. 36. [https://archive.org/details/sim\\_black-history-bulletin\\_1943-11\\_7\\_2\\_0/page/36/mode/2up](https://archive.org/details/sim_black-history-bulletin_1943-11_7_2_0/page/36/mode/2up); accessed 11 December 2020.

<sup>646</sup> Teachout (2003), p. 125.

<sup>647</sup> Scott, Mrs. Matthew T. [Julia Green Scott]. (1911) Address of Mrs. Matthew T. Scott, President General, National Society Daughters of the American Revolution. *The American Monthly Magazine*. May. 38(5). p. 232. The statement is also reproduced in Gaertner *op. cit.*, where it is attributed to the DAR's 1912 report to Congress. *The New York Times* described Batchelor in 2012 as "the first black woman in modern times" to join in 1977; Nir (2012) *op. cit.*

advocacy. She entered the NSDAR not as a symbolic gesture but as a researcher who had rigorously documented her lineage, and her insistence on the quality of that research became the basis on which she defended both her membership and her dignity.

Batchelor's entry into genealogical research began with personal motivation. Her son was born in August 1975, and her New Year's resolution for 1976 was to document her family history for him, a starting point that connects her story directly to the broader genealogical enthusiasm of the post-*Roots* period.<sup>648</sup> Working from primary records, she traced her ancestry to William Hood, an Irish-born Pennsylvanian who served in the Revolution as a private in the Lancaster County Militia, arriving on a rescue mission at Fort Freeland during a British and Native American attack near the Susquehanna River.<sup>649</sup> It was Margaret Ward, a librarian and archivist who had assisted her research, who suggested she apply to the DAR after the Revolutionary ancestry was established.<sup>650</sup>

The resistance Batchelor encountered was immediate and personal. Her outreach to two Detroit chapters, in which she disclosed that she was African American, produced no response: "Let's put it this way," she said. "I received no follow-up on my calls."<sup>651</sup> The path to membership opened through two figures who understood both the organization and the moment. President General Jeannette Osborn Baylies told Michigan's state regent that "I thought the chapter that was willing to take her would do a great service to the national society," framing Batchelor's admission as an institutional opportunity rather than a concession.<sup>652</sup> James Dent Walker, the African American head of Genealogical Services at the National Archives, connected Batchelor with the Ezra Parker Chapter in Royal Oak, Michigan, a large chapter with a diverse membership and substantial younger representation throughout the metropolitan area.<sup>653</sup> After Batchelor submitted her application in October 1977, the NSDAR verified it in December, and her pride in the outcome was explicitly professional: "my stuff stood up under intense scrutiny. My research was flawless on this line, and that makes me feel good, because I'm a researcher."<sup>654</sup>

Resistance persisted even after her admission was complete. A California chapter questioned the validity of her genealogical proof and accused the NSDAR of "hanky-panky." Told by experts

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<sup>648</sup> Talley, Scott. (2023) Detroit native's Ancestry research helped her make history. *Detroit Free Press*. 19 March. <https://www.freep.com/mosaic-story/news/local/detroit-is/2023/03/19/karen-batchelor-detroit/>: accessed 25 March 2023.

<sup>649</sup> Stevens, William K. (1977) A Detroit Black Woman's Roots Lead to a Welcome in the D.A.R. *The New York Times*. 28 December. <https://www.nytimes.com/1977/12/28/>: accessed 22 January 2021; Daughter Dialogues. (2021) *Batchelor, Karen Oral History Summary*. 1 January. <https://www.daughterdialogues.com/product-page/karen-batchelor>: accessed 21 January 2021.

<sup>650</sup> *Ibid.*

<sup>651</sup> *Ibid.*

<sup>652</sup> Stevens (1977), *op. cit.* PG Baylies is identified in all contemporary newspaper accounts only as "Mrs. George Upham Baylies."

<sup>653</sup> Daughter Dialogues (2021), *op. cit.* At the time of Batchelor's application, Walker held undergraduate degrees in Anthropology and Psychology and subsequently became a lawyer and established himself as a professional genealogical researcher.

<sup>654</sup> Stevens *op. cit.*

that her research was excellent, Batchelor closed her papers to public inspection, a prerogative of members at the time, and declined to address what she characterized as “nit-picking.”<sup>655</sup> Her motivations throughout were characteristically direct: she initiated her application because “I could” and because she believed membership would enhance her standing as a genealogist, not because she shared the organization’s patriotic emphasis.<sup>656</sup> Batchelor’s admission generated media coverage beginning in the *Detroit Free Press* and subsequently on the front page of *The New York Times*, on *Good Morning America*, and in over 230 newspapers worldwide. Coverage that transformed a single membership application into a national story about race, heritage, and belonging.<sup>657</sup> Decades later, her reflection on the NSDAR captures both progress and continuing challenges: “As a black woman, I felt I had to leave myself at the door” during her early years in the NSDAR, but “we have made progress, but we still have more progress to make.”<sup>658</sup> That process of progress included, ultimately, learning that she had been blackballed by a chapter that voted against sponsoring her, then deliberately transferring to that chapter, working through the earlier rejection, and serving as its Regent.

### 8.5.2 Lena Ferguson

If Batchelor’s case demonstrated that individual determination and well-documented genealogy could open the NSDAR’s doors, Lena Ferguson’s case demonstrated that individual determination alone was insufficient when institutional resistance operated at the chapter level with tacit national complicity. Ferguson’s four-year battle, which began in 1980 and concluded in 1984, exposed the gap between the NSDAR’s formal commitment to lineage-based membership and the informal racial gatekeeping that local chapter autonomy had long protected. It also produced the most comprehensive institutional reforms in the organization’s history.

Ferguson’s genealogical credentials were not in question. Her lineage traced through her 4x great-grandfather Jonah Gay, a white farmer who served on the Meduncook (now Friendship), Maine Committee of Correspondents during the American Revolution, a lineage previously validated through two successful NSDAR applications, and accepted for Ferguson’s nephew Maurice Barboza’s SAR membership in 1980.<sup>659</sup> When she attempted to join the Mary Washington chapter that same year, her sponsor Margaret Johnston encountered a systematic

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<sup>655</sup> Radcliffe, Donnie. (1978) The DAR’s Changing Image. *The Washington Post*. 21 April. p. 21. <https://www.washingtonpost.com/archive/lifestyle/1978/04/21/the-dars-changing-image/>; accessed 22 January 2021. For a brief period, NSDAR members could close their records so that no one else could view them or use the documentation as a reference for future applications; this prerogative was subsequently discontinued.

<sup>656</sup> Daughter Dialogues *op. cit.*

<sup>657</sup> Talley *op. cit.*

<sup>658</sup> Daughter Dialogues *op. cit.*

<sup>659</sup> Trescott *op. cit.*

pattern of procedural obstruction: “all the chapter members [I] asked to co-sponsor Ferguson turned her down,” which made it “clear to me that she was not welcome because she is black.”<sup>660</sup> Ferguson’s own account of attending a chapter tea captures the social dynamics underlying institutional exclusion with precision: “They were polite, but nobody went overboard to make me feel welcome. Some said hello, then it was over and out.”<sup>661</sup>

The national leadership’s initial response compounded rather than resolved the problem. The offer of at-large membership, presented as a compromise, was correctly interpreted by Ferguson as institutional endorsement of local discrimination: “My conclusion was that they were offering me membership-at-large because the local chapter didn’t want me solely because I’m black, and this way the national is condoning the action of the local.”<sup>662</sup> At-large status denied her voting rights, the ability to hold office, and participation in chapter activities, the substance of membership without its form.<sup>663</sup> The crisis intensified through extensive coverage in *The Washington Post*, *The New York Times*, *The Wall Street Journal*, *Newsweek*, NBC’s *Today Show*, and CBS’s *60 Minutes*, transforming a local membership dispute into a national examination of the organization’s identity.<sup>664</sup> When the D.C. Council threatened to revoke the NSDAR’s real estate tax exemption, a potential annual cost of \$900,000, financial consequences proved more persuasive than moral arguments alone, a frank measure of where institutional priorities had stood.<sup>665</sup>

The Ferguson case also exposed significant internal divisions that extended well beyond local chapter resistance. President General Sarah King faced organized opposition from NSDAR member Joyce Finley, who led “a movement to oust King,” reportedly including “several heads of DAR state delegations and current and former national DAR officers.”<sup>666</sup> This internal conflict, an attempted impeachment of a sitting President General over her handling of a discrimination case, suggests that the resistance Ferguson encountered was not simply the product of individual prejudice but reflected deep institutional disagreement about what the organization was and who it was for. King’s eventual acknowledgment that Ferguson’s application had been handled “inappropriately” was accompanied by comprehensive policy reforms: mandatory anti-discrimination bylaws, an ethics committee to investigate future discrimination allegations, dedicated genealogists to assist African American applicants, and a commitment to systematic research to identify African American Revolutionary War patriots.<sup>667</sup>

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<sup>660</sup> *Ibid.*

<sup>661</sup> *Ibid.*

<sup>662</sup> *Ibid.*

<sup>663</sup> *Ibid.*

<sup>664</sup> Wendt *op. cit.* p. 195.

<sup>665</sup> Wendt *op. cit.* p. 195. David A. Clarke, Chairman of the D.C. Council, called a press conference the day after *The Washington Post*’s front-page article on Ferguson’s case, threatening to revoke the NSDAR’s real estate tax exemption at a potential annual cost of \$900,000.

<sup>666</sup> Wendt *op. cit.* pp. 196–197.

<sup>667</sup> Wendt *op. cit.* pp. 196–197.

The legal settlement required expansion of research methodology to include colonial-era racial descriptors such as “brown,” “yellow,” and “copper” that more accurately reflected historical documentation practices, a technical change with significant implications for who could prove qualifying ancestry.<sup>668</sup>

Historian Adele Logan Alexander, writing during the controversy, placed the Ferguson case within the broader pattern of American hereditary organizations’ relationship to the nation’s complex racial heritage, questioning whether the exclusion Ferguson encountered reflected institutional culture rather than isolated individual behavior.<sup>669</sup> Ferguson herself remained a member for twenty years, until her death in 2004, and her 1996 assessment suggested genuine, if incomplete, institutional evolution. The NSDAR was “trying to put a new face on the organization” while continuing substantial charitable and educational work.<sup>670</sup> Her stated goal throughout, “to honor my mother and father as well as my black and white heritage, and I want to encourage other black women to embrace their own rich history because we’re all Americans,” captures the complex genealogical reality that the organization still navigates: that American Revolutionary heritage is not a white inheritance, and that the organization chartered to honor it had for too long acted as though it were.<sup>671</sup>

### 8.5.3 Institutional Evolution After Ferguson

The reforms that followed the Ferguson case were not merely symbolic. Under the sponsorship of then-Senator Albert Gore Jr., the NSDAR launched comprehensive affirmative action programming and appointed a genealogist specifically to assist minority applicants with their research, a structural investment that acknowledged the additional documentary challenges facing applicants tracing ancestry through enslaved or otherwise marginalized ancestors.<sup>672</sup> The 1993 bylaws revision codified in explicit language what had previously existed only in principle, stating unambiguously: “No chapter may discriminate against the applicant based on race or creed.”<sup>673</sup> The Forgotten Patriots project, which identified African American and Native American patriots whose Revolutionary service had been previously unrecognized or overlooked, grew from these commitments into one of the organization’s most significant scholarly contributions. By 2001, the project had identified 2,400 African American and

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<sup>668</sup> Barnes, Bart *op. cit.*

<sup>669</sup> Alexander, Adele Logan. (1984) Daughters of Revolution and Children of Slavery. *The Washington Post*. 27 October. p. C1.

<sup>670</sup> Fears, Darryl. (2013) Daughter’s Family Pride. *The Washington Post*. 30 June. p. C1. <https://www.proquest.com/>: accessed 9 February 2021.

<sup>671</sup> *Ibid.*

<sup>672</sup> National Society Daughters of the American Revolution. (1986) State of the Society. *Proceedings of the Ninety-Fifth Annual Continental Congress*. 14 April. p. 28.

<sup>673</sup> National Society Daughters of the American Revolution. (1993) Report of Registrar General. *Proceedings of the One Hundred Second Annual Continental Congress*. 19 April. p. 83.

American Indian patriots, including 744 previously assumed to be white, and the expanded edition of *Forgotten Patriots: African American and American Indians in the Revolutionary War*, published in 2008, ultimately included over 6,600 names.<sup>674</sup> A Forgotten Patriots Symposium in 2003 attracted 225 attendees and featured historians discussing minority contributions to American independence, an event that positioned the NSDAR as a participant in the scholarly reclamation of a more complete Revolutionary history.<sup>675</sup>

The organizational infrastructure supporting diverse membership continued to develop through the remainder of the study period. Specialty research teams for African American, Native American, French, and Spanish ancestry research, alongside brochures and webinars focused explicitly on Jewish, African American, and Native American genealogical research, provided practical support for applicants navigating documentary challenges specific to their ancestry.<sup>676</sup> By 2012, five of the thirteen members of a new Queens, New York, chapter were African American, making it one of the first chapters in the organization's history started by a Black woman, Wilhelmena Rhodes Kelly, who would go on to become the first African American state regent in the NSDAR.<sup>677</sup> The organization's decision not to maintain official statistics on members' racial backgrounds and not to request ethnicity information on applications reflects an interpretive ambiguity that persists today. Critics may read this as resistance to accountability, while defenders see it as fidelity to the founders' intent to create an organization defined by lineage rather than racial categorization.<sup>678</sup> What Chujo's 2005 analysis, which mistakenly claimed there were no African American NSDAR members, most clearly reveals is how completely public perception had lagged behind organizational reality, a gap between reputation and practice that the organization has struggled consistently to close.<sup>679</sup>

## 8.6 Reconciling Competing Visions of Patriotism

Wendt poses a crucial question about the contemporary NSDAR: "one wonders how the DAR's more diverse membership reconciles competing visions of patriotism."<sup>680</sup> The interview data

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<sup>674</sup> National Society Daughters of the American Revolution. (2015) Lineage Research Appendix C. *Proceedings of the One Hundred Twenty-Fourth Annual Continental Congress*. June. p. 334. See NSDAR proceedings from 2005–2020 for the full scope of this work.

<sup>675</sup> National Society Daughters of the American Revolution. (2003) Volunteer Information Specialists. *Proceedings of the One Hundred Twelfth Annual Continental Congress*. 11 July. p. 206.

<sup>676</sup> NSDAR research guidance materials developed during the study period include specialized resources for African American genealogy, Native American genealogy, and populations facing distinctive documentary challenges unique to their historical circumstances.

<sup>677</sup> Nir *op. cit.*

<sup>678</sup> Reisman-Brill. (2019) Dare I Join the Daughters of the American Revolution? *The Humanist*. January/February. <https://thehumanist.com/magazine/january-february-2020/commentary/the-humanist-dilemma-dare-i-join-the-daughters-of-the-american-revolution/>; accessed 2 January 2020.

<sup>679</sup> Chujo *op. cit.* pp. 160–164. Chujo's claim that there were no African American members as of 2005 is factually incorrect as shown in the chapter.

<sup>680</sup> Wendt *op. cit.* p. 209.

from this study provides substantial insight into this tension, revealing how members navigate an organization whose historical conservative positioning, documented resolutions on immigration restriction, English-only policies, and opposition to claims from civil rights movements, now coexists with a membership increasingly diverse in race, politics, and cultural background.<sup>681</sup> The answer, across the range of interviews conducted for this study, is not ideological consensus but rather selective engagement: members find in genealogical research, service work, and heritage preservation a common ground that allows them to participate meaningfully without requiring agreement on the political questions that have historically divided the organization.

The interviews reveal multiple strategies for navigating this. AK described responding to accusations that the NSDAR is “a racist organization” by pointing to the organization’s public materials, “our webpage shows the diversity,” while acknowledging the Marian Anderson incident and framing organizational identity as dynamic rather than fixed: “We are evolving, you know, and yes, at one time, I’m sure there was probably no black people that belonged...obviously, times have changed.”<sup>682</sup> This perspective draws a clear line between historical practice and contemporary membership, insisting that the organization is better understood by what it is becoming than by what it has been. JD articulated a related but more historically conscious position, acknowledging that while some dismiss the NSDAR as “a racist, bigoted, conservative bunch,” the reality is that “the daughters were once reflective of many women of their time,” a framing that contextualizes rather than excuses historical exclusion while still separating it from present practice.<sup>683</sup> JD also identified the class dimension that historical analysis tends to obscure: “if you belong to DAR at one point, you were probably in the upper middle-class to upper-class society...if you are not able to pay the fees, you’re not going to belong to DAR, that’s the reality of it.”<sup>684</sup> This frank assessment recognizes that the organization’s barriers have never been solely racial; economic accessibility is a structural constraint that operates alongside and independently of the historical racial exclusions that receive more scholarly and media attention.

Perhaps most analytically significant is the perspective of new members who question whether diversity initiatives can be meaningful without the deeper institutional conversations they require. AB, who joined recently and is under thirty, argued that she does not “think that there should necessarily be a push for diversity unless DAR...is really ready to deal with all that that comes with, which is talking about really uncomfortable topics like American slavery.” She

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<sup>681</sup> Wendt *op. cit.* pp. 208–209. Wendt documents NSDAR resolutions from 1980 onward reflecting conservative positions, including opposition to gun control, English-only policies, military support, skepticism toward the United Nations, and resistance to certain civil rights movement claims.

<sup>682</sup> AK (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>683</sup> JD (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>684</sup> *Ibid.*

questioned organizational readiness directly: “I don’t know that we’re there yet as an organization.”<sup>685</sup> This is not a rejection of diversity but a demand that it be substantive rather than symbolic, a perspective that reframes the question of reconciliation from one about individual accommodation to one about institutional depth.

ME, a fifth-generation member with recent Native American heritage, offers the study’s most historically layered account of the bloodline requirement’s double-edged character.<sup>686</sup> Her grandmother joined in 1943 because the NSDAR “was the only women’s group she could join...because of her race” since membership was “lineage based” rather than requiring the social approval that other women’s organizations demanded of their candidates.<sup>687</sup> This historical detail upends the assumption that the bloodline requirement is uniformly exclusionary. For some women of color in the mid-twentieth century, it was the only available pathway into civic women’s organizations, precisely because it bypassed the informal social vetting through which racial exclusion elsewhere operated. Yet ME was also frank about the limitations of contemporary efforts, describing diversity as “a buzz word” without sufficient “on the ground” implementation, and advocating for generational change as the primary mechanism of transformation.<sup>688</sup>

Wendt’s observation that in 2013 the NSDAR “ceased passing resolutions to lobby for major policy change, probably facilitating harmony among the organization’s members by depoliticizing their activism” offers an institutional explanation for how a more politically diverse membership has coexisted within a single organization.<sup>689</sup> By stepping back from explicit policy advocacy, the NSDAR created space for members with divergent political views to participate without confronting resolutions that might directly conflict with their personal positions. TK, an African American member who has served as a chapter registrar, confirmed both the persistence of political tension and the mechanisms through which it is managed: “politics do have a way of surfacing themselves in an organization that should be nonpolitical,” she observed, noting that some members have “an idea of how patriotism should be expressed and sometimes it’s flat out racist.”<sup>690</sup> Yet she drew a meaningful distinction between “the old guard,” with “a very specific view of how things are supposed to be,” and “today’s DAR,” framing generational transition as the organization’s primary pathway toward genuine transformation rather than managed accommodation.<sup>691</sup> MC, who noted having to “be careful

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<sup>685</sup> AB (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>686</sup> ME. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom. ME is a member of a recognized Native American tribe whose family, within recent memory, was on a reservation. To protect her privacy, her tribal affiliations and home state are not named in this study.

<sup>687</sup> ME. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom. ME’s grandmother joined under the family’s Mayflower lineage through the Howe family, connecting to Governor William Bradford.

<sup>688</sup> ME. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>689</sup> Wendt *op. cit.* p. 209.

<sup>690</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

<sup>691</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

what I say...in DAR forums,” confirmed that internal political diversity is real even where organizational consensus is performed.<sup>692</sup>

These varied testimonies demonstrate that the NSDAR is not an organization that has resolved the paradox Strange identified at its founding but one that is actively, imperfectly, and continuously negotiating it. Members do not uniformly endorse or reject the organization’s historical positions; they negotiate individual relationships with the organization’s identity, finding in shared genealogical interests and community service a basis for participation that does not require ideological conformity. Whether this negotiation constitutes a genuine transformation or a more sophisticated accommodation of diversity without structural change remains, as AB’s testimony suggests, an open question that members themselves continue to press.

## **8.7 Conclusion**

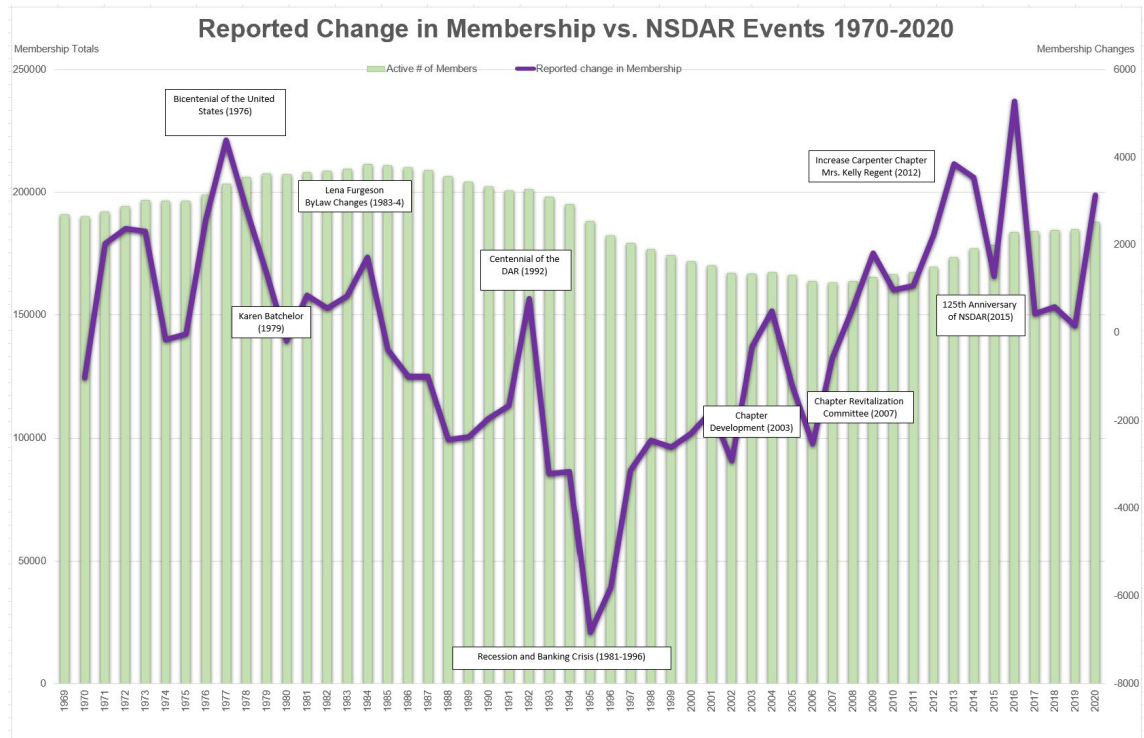
The NSDAR’s trajectory between 1970 and 2020 illustrates how a bounded hereditary organization subculture can simultaneously modernize its institutional infrastructure, confront its historical exclusions, and adapt to changing social expectations, while maintaining the core bloodline-based membership requirement that defines it as a hereditary organization rather than a civic club. The organization’s technological evolution, from the Betty Newkirk Seimes Microfilm Center through the GRS and eApps to DNA evidence acceptance, demonstrates institutional capacity for adaptive change that parallels, while remaining distinct from, the broader genealogical ecosystem’s transformation during the same period. The NSDAR was not simply carried along by these changes; it actively shaped its technological environment through proprietary tools, training programs, and documentation standards that reflect organizational requirements existing nowhere else in American genealogical practice.

What distinguishes the NSDAR’s response, and what the interview evidence consistently confirms, is that the organization’s contemporary practices reflect genuine institutional reform rather than merely cosmetic adjustment. The integration cases of Karen Batchelor and Lena Ferguson are not anomalies in the NSDAR’s history; they are representative of the structural tension at the heart of all hereditary organizations that claim democratic values while restricting access through lineage. The remaining barriers are structural (the cost and difficulty of genealogical proof), demographic (a membership age profile that began to shift in the 2010s), and cultural (the challenge of reconciling diverse political views within a heritage framework),

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<sup>692</sup> MC. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

not policies of deliberate racial or ethnic exclusion (Figure 44). The NSDAR’s experience in this fifty-year period thus provides a case study not of a static, exclusionary institution, but of an organization actively, if imperfectly, negotiating the paradox of democratic exclusion that Strange identified as central to its founding mission, and doing so in ways that its members themselves experience as consequential, contested, and ongoing.



**Figure 44:** *Reported Change in NSDAR Membership Relative to Organizational Events, 1969–2020.* Green bars (left axis) show total active membership across the study period. The purple line (right axis) tracks the annual reported change in membership, with positive values indicating net growth and negative values indicating net decline. Annotated events identify key organizational and contextual factors correlated with notable shifts in the membership change trajectory, including the Bicentennial of the United States (1976), the admission of Karen Batchelor (1979), the Lena Ferguson bylaw changes (1983–84), the Recession and Banking Crisis (1981–1996), the DAR Centennial (1992), the Chapter Development initiative (2003), the Chapter Revitalization Committee (2007), the establishment of the Carpenter Chapter under Mrs. Kelly as Regent (2012), and the 125th Anniversary of the NSDAR (2015). The chart illustrates that membership losses were most sustained during the economic contraction of the 1980s and 1990s, while organizational initiatives and milestone anniversaries correlate with recoveries in the annual change figures. Source: NSDAR Annual Proceedings, 1969–2020.

## Chapter 9 A Proactive Past Through Genealogy

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Within the diverse ecosystem of American genealogical practice, the General Society of Mayflower Descendants (GSMD) occupies a distinctive position. As established in Chapter 1, hereditary lineage organizations constitute one bounded subculture within a broader genealogical landscape that includes Mormon family history research, African American genealogical recovery work, Jewish genealogical societies, Indigenous community-based research, and the professional practitioner community. The GSMD sits within the hereditary organization subculture, sharing its bloodline-based membership criteria and documentary verification processes, yet it developed institutional characteristics that set it apart even from comparable organizations. Its scale, governance structure, research infrastructure, and proactive management philosophy distinguish it not only from the broader genealogical world but from the NSDAR itself, examined in the preceding chapter. Understanding those distinctions is central to the argument this chapter develops: that organizational size, structure, and public profile shape the kinds of adaptation that heritage organizations can achieve, and that the GSMD's relative obscurity outside its membership community enabled a form of systematic, research-driven evolution that organizations operating under public scrutiny cannot easily replicate.

The GSMD also occupies a distinctive temporal position within the hereditary organization subculture. Its founding event predates the United States itself, tracing membership eligibility to 1620 rather than to the years surrounding the nation's founding, as do many lineage societies. While NSDAR applications must document lineage to an ancestor whose Revolutionary service occurred between 1775 and 1783, GSMD applications require documentation extending potentially four or more additional generations into the past, to individuals who lived and died in seventeenth-century Plymouth Colony.<sup>693</sup> This extended chronological scope means that GSMD research engages documentary challenges of bridging European and American records across the colonial period.

This chapter posits that the GSMD practices an anticipatory management style, in which organizational leaders identify and address challenges before they become crises.<sup>694</sup> This

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<sup>693</sup> The chronological difference is substantial: GSMD-eligible ancestors died between 1620 and approximately 1700, while DAR-eligible Patriots served between 1775 and 1783, representing a gap of roughly 75-150 years depending on the specific lineages.

<sup>694</sup> Ashley, William C. and Morrison, James L. (1997) Anticipatory Management Tools for Better Decision Making. *The Futurist*. September/October. 31(5). pp. 47–50. <http://horizon.unc.edu/courses/papers/AnticipatoryManagement.html>: accessed 1 August 2025; Evenseth, Lise L., et al. (2022) Building Organizational Resilience Through Organizational Learning: A Systematic Review. *Frontiers in Communication* 7. February. pp. 1–16. <http://dx.doi.org/10.3389/fcomm.2022.837386>: accessed 29 July 2025. The GSMD's approximately 30,000 members versus the NSDAR's 190,000+ creates distinct institutional dynamics; membership figures as of 2020.

positioned the GSMD to become an innovative leader in genealogical research, DNA science, and digital partnerships while maintaining rigorous standards. Conversely, the NSDAR faced high-profile controversies that often required defensive responses. GSMD's lower public profile enabled organizational learning without the reactive pressures documented in Chapter 8.<sup>695</sup>

This chapter traces the transformation of the GSMD from 1970s infrastructure-building through the 2000s, showing how consistent institutional investment built capacity for adaptation and steady growth. Although published scholarship on the GSMD is considerably thinner than that available on the NSDAR, the organization's own quarterly proceedings and formal committee reports provide a detailed institutional record from which organizational evolution can be reconstructed.

### 9.1. The Winslow Table Summit

In January 1897, twenty-seven delegates from four separate state-based Mayflower descendant societies gathered at Pilgrim Hall in Plymouth, Massachusetts. Seated at a table once owned by Edward Winslow, the third governor of Plymouth Colony, they established one of America's most prestigious lineage organizations: The General Society of Mayflower Descendants. This meeting, called to order by Francis Olcott Allen of Pennsylvania and chaired by Rev. Roderick Terry of New York, marked the formal beginning of an organization dedicated to preserving the legacy of those 102 passengers who braved the Atlantic crossing aboard the Mayflower and chose to remain in 1620.<sup>696</sup>

The society's founding occurred within the same cultural moment that produced the NSDAR, the SAR, and numerous other hereditary organizations. As discussed in Chapter 2, this period produced a distinctive model of institutional patriotism. Organizations that claimed democratic values while restricting membership through genealogical documentation requirements. The GSMD was part of this formation, but its distinctive founding event gave it a particular character. According to a 1924 report, the society was actively engaged in "a definite program of patriotism," with efforts to educate immigrants about the country's founding history. Membership was available to anyone, male or female, over the age of 18 who was descended from a signer of the Mayflower Compact or a passenger on the ship.<sup>697</sup>

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<sup>695</sup> See Chapter 8, Section 8.5 for the full account of NSDAR controversies during the study period.

<sup>696</sup> Wilday *op. cit.* p. 103.

<sup>697</sup> ———. (1897) Back to The Mayflower. *The Daily Morning Journal and Courier*. 5 May. <https://www.genealogybank.com/>; accessed 12 December 2024.

The first state society was formed in New York in 1894, followed by Massachusetts, Connecticut, and Pennsylvania, before the national organization was formalized.<sup>698</sup> The GSMD's governance structure distinguished it from most organizations. Rather than a centralized national body with chapters subordinate to national authority, the GSMD established a bottom-up model in which the national umbrella loosely connects to each state. While the organization has overarching governing documents, each state society operates independently of the others and of the national organization. The state sets its own dues and application fees, approves the applications, sends them to headquarters for final review, and manages the state society as it sees fit, with little interference from the national organization. A comparable structure exists within the National Society Colonial Dames of America (NSCDA), whose forty-three societies work independently under a national umbrella.<sup>699</sup> This bottom-up approach to governance contrasts sharply with most other lineage organizations' top-down approach, and has had lasting implications for the GSMD's adaptability and resilience, as will be demonstrated throughout this chapter. A diagram of the GSMD's leadership is in Appendix \_\_\_.

Today, GSMD serves as a cornerstone institution for documenting and celebrating the Pilgrim lineage. GSMD describes itself as “the leading organization perpetuating the memory of the 1620 Mayflower Pilgrims through excellence in research and family history,” providing education about “why the Mayflower Pilgrims were important, how they shaped western civilization, and what their 1620 voyage means today and its impact on the world.”<sup>700</sup> Many media outlets have claimed that an estimated 10 million Americans and 35 million people worldwide are direct descendants of the Mayflower passengers. However, GSMD no longer promotes this claim because it cannot verify its accuracy. The GSMD acknowledges that it connects only a fraction of the qualified individuals through its approximately 30,000 members across fifty-four member societies located in the United States, Canada, Australia, and Europe.<sup>701</sup>

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<sup>698</sup> Berger, Joseph. (1984) Pilgrims' Journey Across Time: First-Class From Plymouth Rock to Plaza. *The New York Times*. 22 November. p.A16. <https://nyti.ms/3cATw5>: accessed 15 March 2021; Massachusetts Mayflower. (2024) Welcome to Massachusetts Society of Mayflower Descendants. <https://massmayflower.org/>: accessed 2 March 2025; Anon. (1897) Mayflower Descendants. *Worcester Morning Daily Spy*. 14 January. <https://www.genealogybank.com/>: accessed 12 December 2024.

<sup>699</sup> National Society Colonial Dames of America. (2025) Membership. NSCDA 1891. <https://nscda.org/about/membership/>: accessed 1 August 2025.

<sup>700</sup> Legere, Christine. (2010) Pilgrims in the Family Tree. *The Boston Globe*. 12 September. <https://www.newspapers.com/image/455315323>: accessed 14 May 2024; General Society of Mayflower Descendants. (2019) General Society Mayflower Descendants Becomes Sole Owner of National Pilgrim Memorial Meetinghouse. *PR Newswire*. 23 February. <https://www.proquest.com>: accessed 29 March 2024; The Mayflower Society. (2024) *The General Society of Mayflower Descendants*. <https://themayflowersociety.org/>: accessed 10 May 2024.

<sup>701</sup> Wilday. *op. cit.*

## 9.2. Strategic Partnerships in Genealogical Infrastructure

Originally headquartered in Boston, GSMD established an early affiliation with the New England Historic and Genealogical Society (NEHGS), another important Boston institution discussed in Chapters 2 and 3 in relation to the broader development of American genealogical infrastructure. The NEHGS had already celebrated its fiftieth anniversary at the time of GSMD's founding, positioning the organization to assist the fledgling society and allowing it to hold offices in its building. The collections, publications, and expertise at NEHGS complemented the aims of the Mayflower Society, and prospective members used its genealogical and historical resources to prove Mayflower lineages. This institutional partnership, forged between a research society and a genealogical library from the organization's earliest years, established a model of collaborative infrastructure-sharing that distinguished the GSMD from organizations that attempted to build wholly proprietary research collections.

Throughout its history, the GSMD has faced various challenges that have required adaptation. A significant documentation challenge was a 1947 fire that destroyed many of the Society's records, including 17,000 early lineages, and had a lasting impact on the organization in several ways. Reports from the *Boston Globe* in November 1947 described the extent of the damage done to the collections. The fire primarily affected the GSMD offices, destroying the majority of GSMD application records, but only a small portion of the historical documents in the NEHGS archives.<sup>702</sup>

Crucially, the organization's decentralized governance structure proved its worth in this crisis. Because the GSMD state societies kept application copies for their separate records, they were able to recover lineage information that would otherwise have been permanently lost. Institutional resilience that a centralized organization could not have replicated. When GSMD relocated its headquarters to Plymouth, Massachusetts, in 1961, connections with NEHGS remained intact, which was particularly important in the years leading up to the construction of the GSMD library in the 1970s, when the organization had no safe storage for its historical papers. By 1981, all lost membership applications from the fire had been replaced through state society microfilm copies.<sup>703</sup> However, the state societies had not retained the supporting documentation, most likely destroyed with the originals, and those supporting records are precisely what researchers need to verify new connections to established lineages, a challenge that has shaped the GSMD's approach to application standards ever since.<sup>704</sup>

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<sup>702</sup> ———.(1947) Beacon Hill Fire Destroys Records of Pilgrim Colony. *The Boston Globe*. 20 November. <https://www.newspapers.com/image/433499599/?match=1&terms=Mayflower%20fire>: accessed 15 March 2023.

<sup>703</sup> The General Society of Mayflower Descendants. (1981) Membership Report. *The Mayflower Quarterly*. 47(4). State society microfilm copies enabled full recovery of the 17,000 early lineages destroyed in the 1947 fire.

<sup>704</sup> The General Society of Mayflower Descendants. (1981) Membership Report. *The Mayflower Quarterly*. 47(4).

### 9.3. Pink, Green, and Silver Books

The GSMD's most significant genealogical research initiative began in 1959, when Lewis E. Neff, then HG and later GG, proposed at the September General Board of Assistants meeting a series of books documenting five generations of descendants of Mayflower passengers.<sup>705</sup> The project's scope and mission were unprecedented: as the 1972 proceedings explained, "there are many eligible persons around the world who are unable to join because they cannot afford the time or money to prove their descent from Mayflower passengers."<sup>706</sup> The resulting Five Generations Project (FGP) aimed to trace "all provable lines of descent, through all sons and daughters, grandsons and granddaughters, etc., for five generations from each Mayflower passenger, or to about the time of the Revolution."<sup>707</sup> Quickly becoming the organization's "Bicentennial project" and a means to simplify membership application research.<sup>708</sup>

This represents one of the GSMD's most distinctive responses to the paradox of democratic exclusion. Rather than accepting that genealogical documentation was expensive and therefore exclusionary, the organization invested in creating the documentation itself. Unlike the NSDAR's Patriot Index, which listed patriot ancestors and their descendants without genealogical source citations that would allow the publication to serve as proof of lineage. The FGP was fully referenced, creating a research tool that genuinely lowered the barrier to documented membership.<sup>709</sup>

Editorial credibility was central to the project. Lucy Mary Kellogg, introduced as editor in 1970, was among the first Certified Genealogists through the BCG and a Fellow of the American Society of Genealogists (FASG).<sup>710</sup> She established the organizational approach still evident today before her death in December 1973.<sup>711</sup> It became institutional tradition that the overall editor hold at least a CG designation, with a strong preference for FASG, the highest individual recognition in American genealogy, bridging the hereditary organization subculture and the professional practitioner community.

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<sup>705</sup> Mucia, Bonnie Wade. (2024) History of the Silver Books. *The Mayflower Society*.

<https://themayflowersociety.org/genealogy/explore-your-roots/silver-books-project>: accessed 10 March 2024.

<sup>706</sup> The General Society of Mayflower Descendants. (1981) Membership Report. *The Mayflower Quarterly*. 47(4). The membership report documents the recovery of application copies from state society microfilm but notes that supporting documentation was not retained with the copies by state societies. The absence of this documentation directly informed the GSMD's subsequent emphasis on primary-source application standards,

<sup>707</sup> The General Society of Mayflower Descendants. (1972) What is the Five Generations Project? *The Mayflower Quarterly*. 38(2). p.122.

<sup>708</sup> Grattan, Marion S. (1973) Mayflower Compact adds historic note to holiday. *Jackson Citizen Patriot*. 22 November. <https://www.newspapers.com/>: accessed 12 March 2024.

<sup>709</sup> The General Society of Mayflower Descendants. (1978) Five Generations Project. *The Mayflower Quarterly*. 38(4). p.123.

<sup>710</sup> The General Society of Mayflower Descendants. (1972) Help Needed in Barbados. *The Mayflower Quarterly*. 36(2). p.116

<sup>711</sup> Obituary. (1973) Kellogg, Lucy Mary. *Detroit Free Press*. 17 December. <https://www.newspapers.com/>: accessed 12 March 2024

The first volume, featuring passengers Francis Easton, Samuel Fuller, and William White, was published in 1975 and sold nearly 3,000 copies in 14 months.<sup>712</sup> By 1978, over 4,500 copies had been sold, requiring two reprints.<sup>713</sup> By 1985, the GSMD acknowledged that the project's scope was "a hundred times larger than originally realized." Only one volume had been envisioned at the outset.<sup>714</sup> The publications, now known as the Silver Books for their distinctive silver covers, became recognized reference tools for colonial American research. To manage the research pipeline, GSMD introduced Mayflower Families in Progress (MFIP) in 1986, the "pink and green books," which published unfinished research to allow member contributions before final Silver Book publication.<sup>715</sup>

A critical test came in 1991, when an intellectual property dispute threatened the project's future. HG Caroline Lewis Kardell wrote an open letter to the membership about researchers who had threatened to take their work to "a private publisher who will hold the copyright to prevent the Society from publishing what is, and was from the beginning, Society-sponsored work."<sup>716</sup> The crisis was resolved through appeals to the researchers' "moral commitment" and "honor and integrity" rather than legal enforcement.<sup>717</sup> Illustrating how institutional authority in volunteer-based genealogical organizations rests on professional norms and shared mission rather than formal contractual structures.

In 2013, the project was formally renamed the Silver Books Project, reflecting the research already completed well beyond the fifth generation; the updated goal became documenting all families through generation seven and naming generation eight.<sup>718</sup> At the writing of this thesis, Silver Books exist for twenty-five families, with publication dates spanning 1975 to 2024. Accessibility has expanded dramatically through modern partnerships: a 2017 agreement with FamilySearch digitized and indexed the Silver Books alongside fifty years of *Mayflower Quarterly* magazines.<sup>719</sup> While an agreement with NEHGS made digital copies available to American Ancestors members, including indices of fifth- and sixth-generation Silver Books descendants.<sup>720</sup> In 2021, Bonnie Wade Mucia was appointed Director of the Silver Books

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<sup>712</sup> The General Society of Mayflower Descendants. (1977) Five Generations Project News. *The Mayflower Quarterly*. 43(1). p.23.

<sup>713</sup> The General Society of Mayflower Descendants. (1978) Report of the Five Generations Project Chairman. *The Mayflower Quarterly*. 44(4). p.143.

<sup>714</sup> The General Society of Mayflower Descendants. (1985) Report of the Five Generations Project. *The Mayflower Quarterly*. 51(4). p.213

<sup>715</sup> The General Society of Mayflower Descendants. (1986) Report of the Governor General. *The Mayflower Quarterly*. 52(4). p.195; Rojo, Heather Wilkinson. (2021) The Mayflower Silver Book Project Update. *Nutfield Genealogy*. 16 September. <https://nutfieldgenealogy.blogspot.com/2021/09/the-mayflower-silver-book-project-update.html>; accessed 15 March 2024.

<sup>716</sup> The General Society of Mayflower Descendants. (1991) An Open Letter Concerning The 5-Generation Project. *The Mayflower Quarterly*. 57(1). p.84.

<sup>717</sup> Ibid

<sup>718</sup> The General Society of Mayflower Descendants. (2024) The Reference Guide to the Mayflower Silver Books Series. *The Mayflower Society*. <https://themayflowersociety.org/wp-content/uploads/2024/02/REFERENCE-GUIDE-TO-THE-GSMD-SILVER-BOOK-SERIES.pdf>; accessed 10 May 2024.

<sup>719</sup> Pratt, Mark. (2017) Prove Pilgrim Ancestry With New Partnership. *The Burlington Free Press*. 23 July. <https://www.newspapers.com/image/322488252>; accessed 14 May 2024.

<sup>720</sup> New England Historical and Genealogical Society. (2020) Research Your Mayflower Ancestry. *American Ancestors*. <https://mayflower.americanancestors.org/mayflower-research-databases>; accessed 10 March 2024.

project, overseeing expansion to over a dozen new editions in research or preparation for publication.<sup>721</sup> The Silver Books are now accepted as proof of lineage by many other lineage societies — one of the few published genealogy series to hold that distinction, positioning the GSMD's research output as authoritative across multiple genealogical subcultures.

#### 9.4. Who Counts as an Ancestor

In 1980, the Historian General assessed the accuracy of the lineages being submitted and stated that “ninety per cent of our lineages were wrong.”<sup>722</sup> Though rejected as exaggerated, the statement reflected an organizational culture that prioritized genealogical research accuracy over appeasing those who sought greater membership numbers. This counterintuitive result suggests that members prefer belonging to an institution with exacting standards, even if those standards make membership more challenging to achieve. In this context, exclusivity becomes a valued attribute rather than an obstacle.

The question of who counts as an ancestor is not merely administrative but embodies the central paradox of democratic exclusion that this thesis traces across both case study organizations. The GSMD's founding mission celebrated the Mayflower Compact as an early exercise in democratic self-governance. Yet the organization simultaneously restricted membership through bloodline documentation requirements, and within those requirements, additional restrictions defined which Mayflower ancestors could serve as an anchor for an application. The history of those restrictions and their gradual relaxation illuminates how hereditary organizations negotiate between their founding values and evolving social expectations.

Building on this foundation, GSMD implemented a series of policy changes regarding which ancestors it recognized as viable for membership. To be a member of the GSMD, a prospective member must be a descendant of a Mayflower passenger who stayed at the colony.<sup>723</sup> However, to improve efficiency and eliminate duplicate lineages submitted by the same member, the GSMD policy from 1900 to 1977 was that an applicant could submit a lineage only through a male passenger (head of household) who left descendants and was the most direct line.<sup>724</sup>

For example, if the applicant were a descendant of Stephen Hopkins, even though his children, Giles and Constance, were passengers, the applicant could only submit the lineage ending with

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<sup>721</sup> Mucia. *op. cit.*; See Chapters 2 and 3 for detailed discussion of record loss in American genealogical research, including the effects of the 1890 census fire and courthouse fires in Southern states.

<sup>722</sup> The General Society of Mayflower Descendants. (1980) Historian General. *The Mayflower Quarterly*. 46(4). p. 214.

<sup>723</sup> This distinction makes descendants of the ship's crew ineligible for membership in the organization.

<sup>724</sup> The General Society of Mayflower Descendants. (1977) Your Mayflower Ancestor. *The Mayflower Quarterly*. 43(1). p. 46; a complete list of passengers, servants, and crew of the Mayflower is in Appendix 11. The table also shows if they survived the first winter, had descendants, and when they became a qualifying ancestor of the GSMD.

Stephen, as the application would list the children. While it may not seem like an important detail, members of lineage societies like to submit supplemental lineages, additional applications verifying every line of descent from eligible ancestors to organizations.<sup>725</sup> Supplemental applications also serve as income generators for most organizations, and turning away revenue has long-term financial consequences.

In 1977, the GSMD revised its acceptable application criteria to include all male passengers, regardless of lineage, who left descendants.<sup>726</sup> From the previous example, this meant that a prospective member could join the GSMD with the Giles Hopkins lineage and then submit a supplemental lineage ending with his father, Stephen Hopkins. The second lineage would require documentation only for the last generation, since the member would be “dovetailing” into their original application, linking a new lineage branch to an already-accepted application rather than re-documenting every generation.

This expansion did not fully satisfy the membership. In 1985, the GSMD approved the additions of William Mullins, John Tilley, and Moses Fletcher to the acceptable ancestors list, the first new additions since Roger Moore in 1920.<sup>727</sup> Mullins and Tilley had been excluded because each died in the first winter, leaving only female offspring whose husbands’ applications already listed them as spouses. Fletcher posed a different case: a Mayflower passenger and compact signer who died in the first winter without bringing his children to the colony. They remained in Leiden with living descendants, and the new policy allowed lineages to branch through children who stayed behind in Europe. It also led to the acceptance of Elizabeth Fisher, Mary Norris, and Mrs. Joan Hunt Rogers as eligible ancestors, as they left descendants in the colony after remarrying following their husbands’ deaths in the first winter.<sup>728</sup>

The most significant, and to date final, policy change occurred in 2009 regarding the expansion of membership eligibility. The Maryland Society Historian requested that the Historian General (HG) re-examine the bylaw sections concerning eligibility.<sup>729</sup> Article III, Section 1, of the bylaws states “descendant from a passenger” without limiting the passenger to males only. Members argued that the HG had assumed the “head of household” rule in the early twentieth

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<sup>725</sup> “Dovetailing” allows a submitted application to tie into an existing application, reducing the amount of documentation the applicant needs to submit. For example, if your ancestor and their father are both qualifying ancestors, you would first submit all lineage documentation for the son. Once the GSMD approves him, you would create a supplemental application that cites your application for the son’s lineage, then provide only the documentation that ties the son to the father. Members often want to document every lineage they are eligible for to help others join by dovetailing into their applications, or to show pride in their genealogical work and lineage. The GSMD encourages members to submit all lineages they can prove for an ancestor who qualifies them as a member.

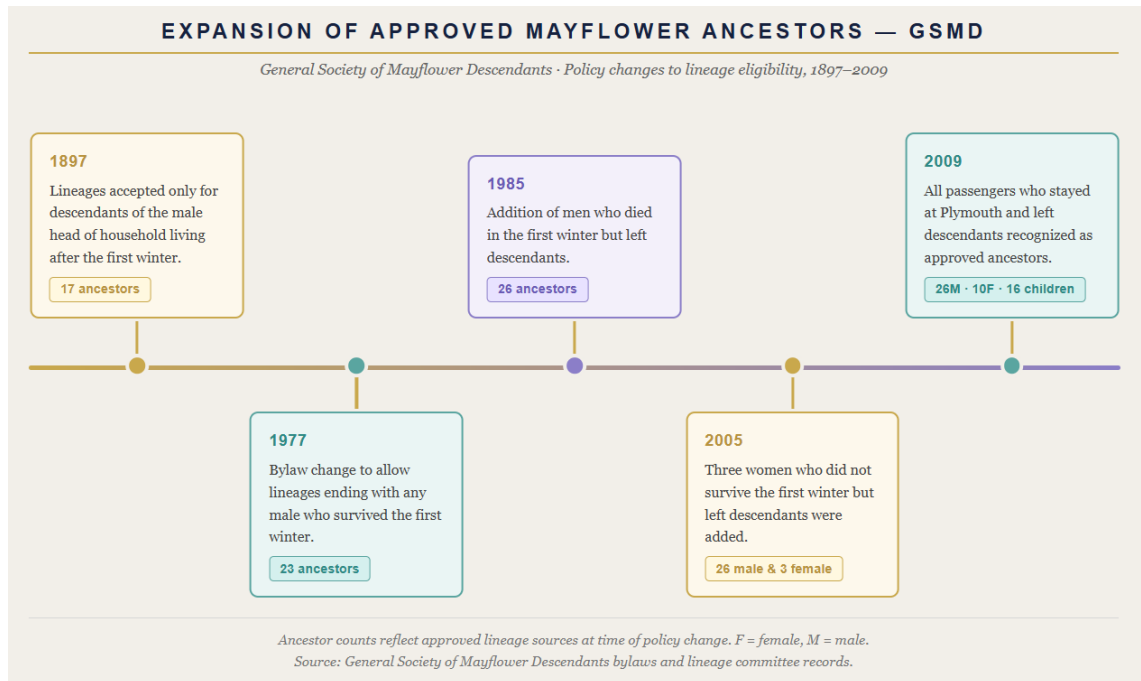
<sup>726</sup> The General Society of Mayflower Descendants. (1977) Your Mayflower Ancestor. *The Mayflower Quarterly*. 43(1). p. 46.

<sup>727</sup> The General Society of Mayflower Descendants. (1985) John Tilley and William Mullins Accorded Full Status as Mayflower Ancestors. *The Mayflower Quarterly*. 51(4). p.181; The General Society of Mayflower Descendants. (1985) Report of the Genealogical Review Panel. *The Mayflower Quarterly*. 51(4). p.214.

<sup>728</sup> The General Society of Mayflower Descendants. (2009) New Mayflower Lineages Opened. *The Mayflower Quarterly*. 75(4). p. 324.

<sup>729</sup> *Ibid.*

century, and the organization needed to either rewrite the bylaw to explicitly state the limitations on eligible ancestors or accept all passengers described in Article III, Section 1. The HG announced at the annual meeting in 2009 that, effective 1 January 2010, all passengers with descendants may serve as the final ancestor on an application.<sup>730</sup> This change expanded the list of eligible lineages to include women and children passengers (Figure 45).



**Figure 45:** Timeline of changes showing which Mayflower ancestors were approved for lineage applications to the GSMD.

The trajectory of these changes illustrates the paradox of democratic exclusion in organizational action. The GSMD consistently framed each expansion as making membership more accessible and more democratic while retaining the bloodline-based criterion that defines the hereditary organization subculture. Broadening who counts as an ancestor did not eliminate the requirement that applicants be biological descendants; it refined which biological descendants could qualify. These expansions represent genuine inclusion efforts within the structure of a genealogically bounded subculture, demonstrating that hereditary organizations can and do adapt their criteria in ways that are substantively responsive to member demand and changing genealogical scholarship, rather than being statically exclusionary.

While the early bylaws made sense in the organization's early days, when genealogy primarily focused on male lineages, these expansions allowed members to recognize all Mayflower passengers from whom they descended. The changes also brought the society in line with other lineage organizations that permitted supplemental applications from existing members

<sup>730</sup> *Ibid.*

documenting every genealogically provable lineage. They provided additional revenue through supplemental applications. A strategic financial consideration that became explicit when the Executive Director's 2019 report noted: "We are losing \$50 per [new] application, the operational loss being funded by existing members."<sup>731</sup> This financial reality provided additional institutional motivation for enabling members to document multiple lineages.

## 9.5. Truth in Genealogy: Building the Gold Standard

The organization currently upholds a tradition of strict standards in genealogy research, verifying lineages through exhaustive research and documentation for all generations.<sup>732</sup> While errors in lines proven in earlier decades occasionally emerged, once a person is accepted into the GSMD, they are considered a member, though the organization encourages them to submit a supplemental application on another line if possible. This reflects a pragmatic institutional position. Existing members are not disenfranchised by newly discovered errors, but the archive of documented lineages is held to the highest attainable standard. Central to that standard is the concept of "proof of one and the same," which requires the applicant to produce a single record for each generation demonstrating the parent-child relationship.<sup>733</sup> In practice, the further back in time a researcher works, the more likely it is that multiple documents will be required, but "proof of one and the same" remains the aspirational benchmark.

### 9.5.1. Application Standards

Currently, becoming a member involves first contacting one of the fifty-four member societies and working with that society's historian to initiate the application process. Lineage "proof" typically consists of vital records (birth, marriage, and death certificates), court records, some published genealogies, and other privately owned family documents.<sup>734</sup> After the state historian reviews, the national team of staff genealogists double-checks applications at the national level, with the HG reviewing only the most challenging cases.<sup>735</sup> This two-tier review structure is

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<sup>731</sup> The General Society of Mayflower Descendants. (2019) Report of the Executive Director. *The Mayflower Quarterly*. 85(4). p.31.

<sup>732</sup> Hubbard, Valerie. (1982) Mayflower Descendants Dig For More Family Roots. *Richmond Times-Dispatch*. 25 April. <https://www.newspapers.com/image/831431902>: accessed 14 May 2024.

<sup>733</sup> Johnson, Melissa A. (2016) The Genealogical Proof Standard in Practice. *NGS Monthly*. January. <https://www.ngsgenealogy.org/wp-content/uploads/NGS-Folder/NGS-Monthly-Johnson-Gen-Proof-Standard-Jan2016.pdf>: accessed 6 February 2025.

<sup>734</sup> Wilday. *op. cit.*

<sup>735</sup> The Associated Press. (1991) Mayflower Descendants Proud. *Asbury Park Press*. 24 November. <https://www.newspapers.com/image/145312351>: accessed 14 May 2024; Bulkeley, William M. (1987) It Isn't Easy to Join Mayflower Society – Even if You Want To. *Wall Street Journal*. 25 November. <https://www.proquest.com/newspapers/isnt-easy-join-mayflower-society-even-if-youwant/docview/398013264/se-2?accountid=14116>: accessed 24 March 2024.

distinctive within the hereditary organization subculture. The GSMD's decentralized approach delegates initial review to volunteer state historians, a source of quality variation that the national staff must address, and a driver of the decision in the 1970s to hire a dedicated staff genealogist to assist the HG, after which application quality measurably improved.<sup>736</sup>

Many early applicants to the GSMD relied heavily on secondary sources to prove lineage. As noted in Chapters 2 and 3, published genealogies vary considerably in quality and accuracy. To raise application standards across all state societies, GSMD began publishing pamphlets in 1981 to train state historians and their reviewers on what was and was not acceptable, based on a publication by California state historian Mrs. Edie Bates Thomas titled "Preparation of Lineage Papers."<sup>737</sup> That same year, the Society established a Genealogical Review Committee to evaluate rejected lineage papers and, where possible, suggest ways to resolve genealogical deficiencies. Enabling applicants who would previously have been refused to establish verifiable lineage for membership.<sup>738</sup> Both initiatives exemplify the anticipatory management philosophy that characterizes the GSMD's institutional approach: proactive standardization distributed before problems are compounded.

Toward the end of the 1980s, GSMD began requiring primary source materials for every generation. This led to tensions between those demanding complete documentation and those advocating more flexibility in the types of proofs submitted to verify a lineage. In 1987, the GSMD replaced HG Barbara Merrick, who strictly enforced documentation requirements, following conflicts over her rigorous approach to verifying lineage claims.<sup>739</sup> Merrick had insisted on primary source materials for every generation, but members objected to this standard. At the 1987 triennial meeting, she was replaced by Caroline Lewis Kardell, who, while still strict, took a more flexible approach, stating that "in a circumstantial case, I give an open-minded reading."<sup>740</sup> This accommodation appeased the membership, as Kardell agreed to review application documentation on a case-by-case basis. The episode illustrates a recurring tension within the hereditary organization subculture between the scholarly drive toward ever-higher evidentiary standards and the membership service imperative to enable qualified applicants to join.

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<sup>736</sup> The General Society of Mayflower Descendants. (1980) Historian General. *The Mayflower Quarterly*. 46(4), p. 214.

<sup>737</sup> The General Society of Mayflower Descendants. (1981) Genealogical Review Committee. *The Mayflower Quarterly*. 51(4), p. 218.

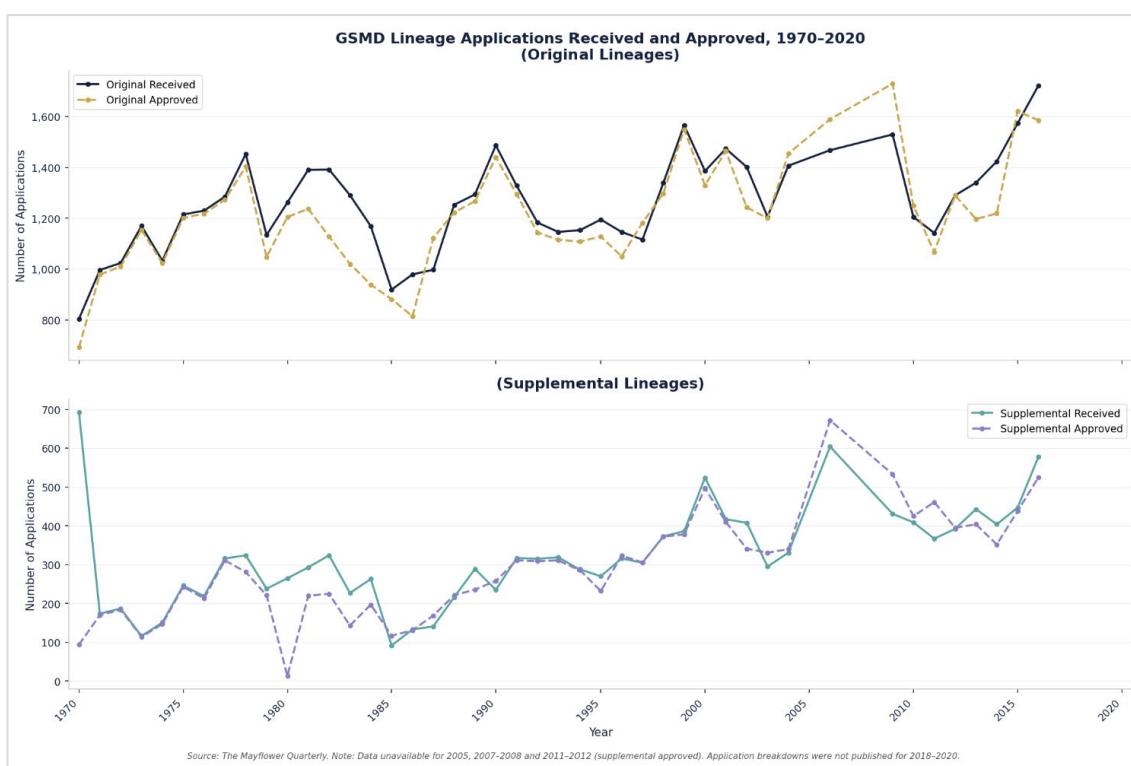
<sup>738</sup> The General Society of Mayflower Descendants. (1981) Genealogical Review Committee. *The Mayflower Quarterly*. 47(1), p. 6.

<sup>739</sup> Bulkeley. *op. cit.*

<sup>740</sup> *Ibid.*

### 9.5.2. Increases and Decreases in Application Numbers

Figure 46 shows that there were typical increases in new member applications during known genealogical surges. As discussed in Chapters 2 and 3, the mid-1970s and early 2000s brought waves of popular genealogical interest that affected all heritage organizations. The GSMD benefited from the 1976 genealogical surge associated with the Bicentennial and the *Roots* phenomenon without having publicly promoted either the organization’s geographical and ancestral specificity, which was its own draw. There were so many applications at that time that the number of pending applications grew for ten years before the GSMD could clear the significant backlog. The numbers rolled over to the following year, as shown in the Figure, with remarkably high approval rates compared to the small numbers received each year.

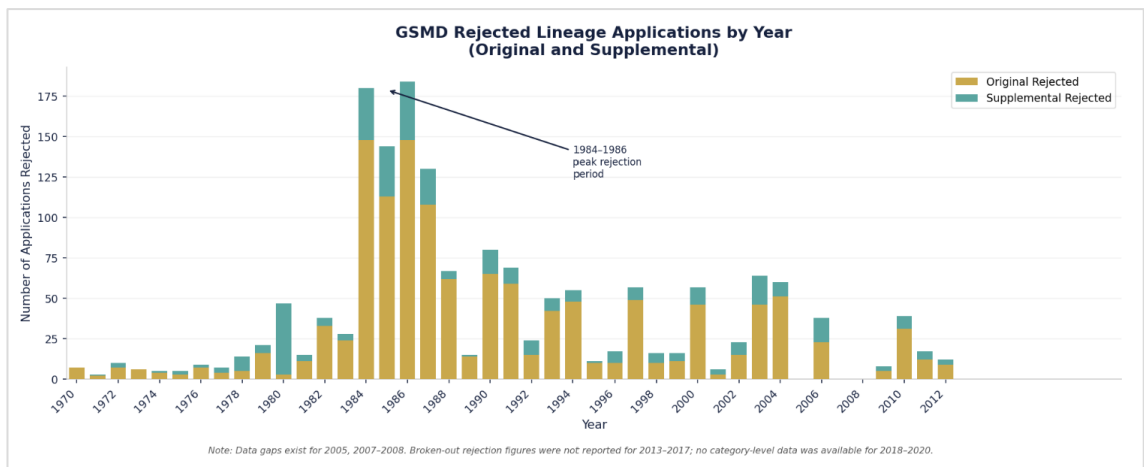


**Figure 46:** Received and Approved: Split into Original (top, Navy/Gold) and Supplemental (bottom, Teal/Purple) to keep the panels readable. The consistent proximity of received and approved lines across both panels demonstrates a very high overall approval rate. Worth noting analytically as evidence of the organization’s generally accommodating application process once applicants clear the evidence threshold.

The supplemental lineage applications show the same increases and decreases. These are optional applications by existing members who choose to submit additional Mayflower lines for documentation. Spikes in supplemental applications often correspond with anticipated increases in application fees. As each state society in the GSMD sets its own fee schedule, there could be a rush to submit supplemental lineages before fee increases take effect. For example,

Massachusetts's application fee is approximately \$300, and annual dues are \$95 as of 2023.<sup>741</sup> Members who could afford it would submit supplementary applications for their yet-to-be-submitted Mayflower ancestors before the deadlines passed.

As seen in Figure 47, the number of rejected applications and supplements also corresponds with changes in genealogical requirements in the society. When the requirements became more stringent, as with the Merrick and Kardell office change during the mid-1980s, rejected lineages continued to appear until applicants and state historians adapted to the new proof requirements. This pattern, rejection spikes following standards increases, is consistent with the dynamics described for the NSDAR in Chapter 8, suggesting a structural characteristic of the hereditary organization subculture rather than a problem unique to either organization.



**Figure 47: Rejected Applications (all available years):** Gold = original rejected, Teal = supplemental. The 1984–1986 spike is the most striking feature; original rejections reached 148 in both 1984 and 1986, compared to single or low double-digit figures in most years. This period corresponds to the GSMD's tightened documentary standards and warrants analytical contextualization in Chapter 9.

## 9.6. Twenty-First-Century Surges in Membership

The surge in genealogical interest during the early twenty-first century, discussed in Chapter 3 in relation to the internet revolution and the rise of consumer genealogy platforms, created new opportunities for the Society to attract members. The GSMD responded by collaborating with genealogical groups to simplify ancestry research and launching a webinar series on the application process for membership.<sup>742</sup> The webinars were created to facilitate the continued adaptation of application processes to modern technologies and research methods and to clarify

<sup>741</sup> McWhirter, Cameron. (2023) An Ugly Feud Is Rocking the Blue-Blooded Mayflower Society. *Wall Street Journal*. <https://www.proquest.com/blogs-podcasts-websites/ugly-feud-is-rocking-blueblooded-mayflower/docview/2891466047/se-2?accountid=14116>: accessed 24 March 2024.

<sup>742</sup> McWhirter. *op. cit.*

GSMD standards for an audience that had grown accustomed to the speed and accessibility of online genealogy platforms.

Beginning in the early 2010s, the Society started offering the Mayflower Lineage Match (MLM) service. This lookup service enabled applicants to compare their suspected Mayflower lineage with previously approved GSMD lineages.<sup>743</sup> The GSMD compared the application to lines from existing applications, Silver Books, and Mayflower Families in Progress (MFIP). Once the GSMD approved a candidate lineage, they directed the prospective member to their local state society to begin the formal membership process.<sup>744</sup> The MLM represented a significant service innovation, offering applicants a preliminary check before committing to the full application fee, and aligned the GSMD more closely with the consumer-friendly genealogy model while maintaining the rigorous standards of its own verification infrastructure.

As the 400th anniversary approached, application volumes increased dramatically, once again creating challenges in maintaining accuracy as processing volumes grew. At the same time, GSMD, American Ancestors (the rebranded NEHGS), and FamilySearch collaborated to create a new database. This database includes all applications and supplemental applications to GSMD from their founding in 1897 through 2020, containing over 165,000 pages with 4.5 million searchable names.<sup>745</sup> The hope was that access to these documents would increase membership and that the adoption of additional lineage-proofing standards would follow.

Throughout its history, the Society maintained its commitment to “truth in genealogy,” continuously upgrading its standards for documentation and proof. Genealogists working within this subculture today are aware of the strict documentation requirements. Interview participant BH described the expectation precisely: “For every generation, you had to have a birth certificate, a death certificate, and a marriage certificate. And if you didn’t...you had to get...three acceptable sources.”<sup>746</sup> The explicitness of this standard (one document per generation, with a clear escalation path for missing records) reflects an institutional systematization of genealogical proof that distinguishes the GSMD from popular genealogy practice, where undocumented family trees on commercial platforms are common, and aligns it with the professional genealogical community’s own evidentiary standards.

The quantitative evidence validates this comprehensive approach: membership grew from 14,338 in 1970 to 31,191 in 2020, a 117% increase over five decades, while maintaining

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<sup>743</sup> Wilday. *op. cit.*

<sup>744</sup> GSMD. (2024) Mayflower Lineage Match: Chart your connection to History. *The Mayflower Society*. <https://themayflowersociety.org/genealogy/mlm-landing-page/>; accessed 14 April 2024.

<sup>745</sup> LeClair, Don. (2020) New Database: General Society of Mayflower Descendants Membership Applications, 1620-1920. *American Ancestors Database News*. <https://dbnews.americanancestors.org/2020/11/10/new-database-general-society-of-mayflower-descendants-membership-applications-1620-1920/>; accessed 15 December 2024.

<sup>746</sup> BH. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

institutional standards and adapting to technological change.<sup>747</sup> This growth pattern, steady rather than volatile, sustained rather than dependent on external cultural moments, distinguishes the GSMD within the hereditary organization subculture.

Understanding GSMD's institutional journey requires recognizing the foundational period that established its distinctive approach to genealogical standards. By embracing rigorous research standards from the beginning, it was hoped that GSMD's reputation would attract serious genealogists.<sup>748</sup> While this approach attracted fewer members than larger organizations, it created an institutional identity that proved resilient over the study period.

The available data from the Mayflower Quarterly's annual reports documents this trajectory. Due to the organization's structure, there is no centralized member database of application information at headquarters, and the annual reports did not include complete application data through the late 2000s, with gaps for 2005, 2007, 2008, and 2011-2020.

Internal reviews at the beginning of the study period revealed that 30% to 40% of previously submitted early applications lacked a thoroughly documented genealogy.<sup>749</sup> This finding did not provoke the kind of public controversy or membership crisis that might have followed had it emerged in a more prominent organization. Instead, it generated a systematic organizational response, the hiring of professional staff, the creation of review committees, and the development of standardized training materials, conducted outside the public eye.

Statistical evidence reveals the scope of these changes. Rejections of lineages on new member applications, which had averaged only 2% to 16% per year throughout the 1970s, spiked dramatically during the 1980s, as seen in Figure 48. There were 148 rejections in 1984, 113 in 1985, 148 in 1986, and 108 in 1987, with a notable spike in 2015 to 636, driven by updates to guidance and changes in DNA data.<sup>750</sup> This represents a more than tenfold increase in rejection rates, demonstrating a commitment to accuracy over convenience.

Perhaps most remarkably, despite the dramatic increase in rejection rates from 1984 to 1989, membership continued to grow from 19,532 in 1980 to 22,524 in 1989, suggesting that those who sought membership valued genealogical accuracy over easier admission processes (Figure 49).<sup>751</sup> Membership subsequently expanded from 23,156 members in 1990 to 31,191 by 2020,

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<sup>747</sup> The General Society of Mayflower Descendants. (1970-2020) Disposition of Lineage. *The Mayflower Quarterly*.

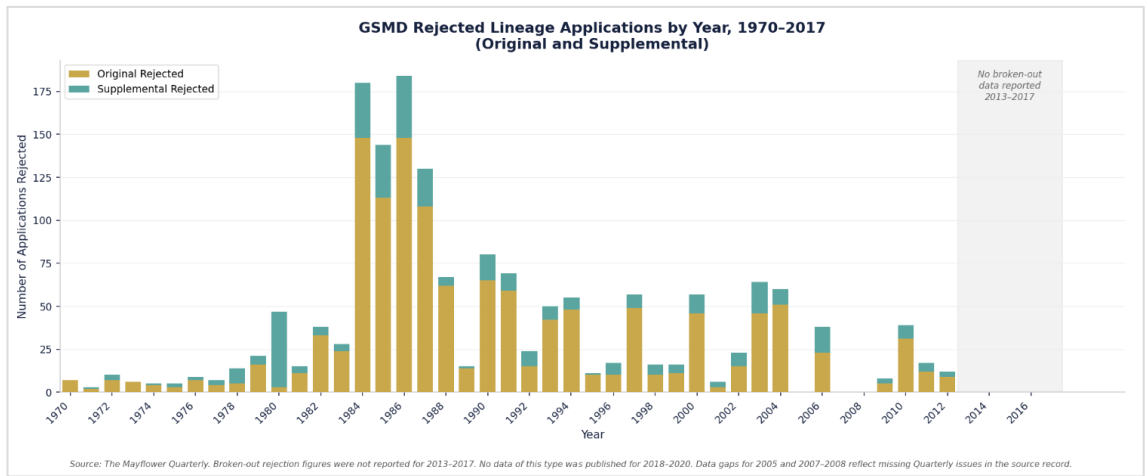
<sup>748</sup> The General Society of Mayflower Descendants. (2014) Report of the Director of Genealogy and Research Services. *The Mayflower Quarterly*. 80(4). p. 231.

<sup>749</sup> The General Society of Mayflower Descendants. (1980) Historian General. *The Mayflower Quarterly*. 46(4). p. 214.

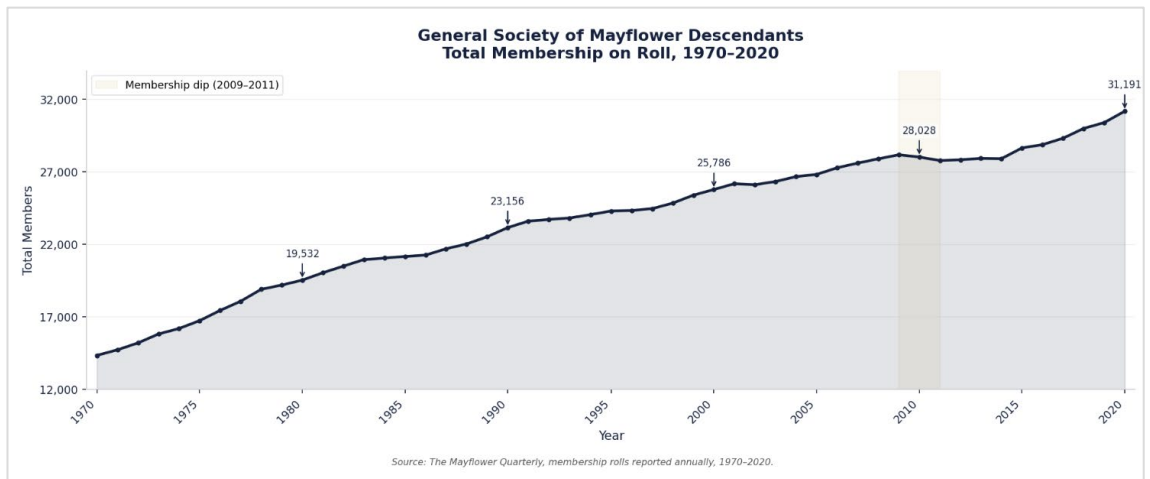
<sup>750</sup> The General Society of Mayflower Descendants. (1970-2020) Disposition of Lineage. *The Mayflower Quarterly*. The 2015 spike to 636 rejections corresponded with updated guidance on acceptable documentation and the integration of DNA evidence into the review process.

<sup>751</sup> *Ibid.*

while consistently maintaining high approval rates for both original and supplemental lineages, demonstrating institutional efficiency alongside growth.<sup>752</sup>



**Figure 48:** Rejected by Year, 1970–2017 (with 2013–2017 gap noted): The grey shaded zone explicitly marks the period where the Mayflower Quarterly did not publish broken-out rejection figures. The data gap for 2018–2020 is noted.



**Figure 49:** Total Membership on Roll, 1970–2020: A near-continuous upward trend from ~14,300 to ~31,200, with a minor dip shaded in gold c.2009–2011 (a period of slight membership contraction visible in the raw numbers). The overall trajectory directly counters narratives of hereditary society decline.

The unprecedented volume that emerged by 2019 illustrates the challenges the organization faced as it navigated the years leading up to the 400th anniversary. The Historian General reported: “In the first seven months of 2019, we had a total of 2,088 submissions. Annualized, that is 3,580 submissions for the year, or 23.4% ABOVE even my optimistic increase.”<sup>753</sup> This

<sup>752</sup> *Ibid.*

<sup>753</sup> The General Society of Mayflower Descendants. (2019) Report of the Historian General. *The Mayflower Quarterly*. 85(4). p. 24.

dramatic increase created operational challenges that required systematic capacity expansion rather than mere efficiency improvements.

### 9.7. Building Tomorrow's Archives Today

The GSMD's approach to technology mirrored its broader institutional philosophy: early adoption, proactive investment, and incremental modernization rather than reactive crisis response. In 1972, the organization began microfilming lineage applications, one set stored at headquarters in Plymouth, a second at Ultra Security Inc. in Hull, Massachusetts, a direct institutional response to the 1947 fire.<sup>754</sup> Computerization followed at the decade's end: by 1979, the organization was applying "advanced word processing techniques" via an IBM magnetic card typewriter to the Five Generations Project and using computing for its Mayflower Ancestral Index, placing the GSMD ahead of many comparable organizations, including the NSDAR.<sup>755</sup> The following year brought a \$15,000 investment in a dedicated computer for the HG's use, funded jointly by Plymouth's 350th Anniversary Committee and the Jocelyn Knight Bequest, the town's financial participation reflecting the mutual benefit between the GSMD and Plymouth's heritage economy.<sup>756</sup> By 1982, Governor General Dwight E. Twist formally recommended the establishment of an Electronic Data Processing Committee, citing "a growing need for computerizing our records" and noting that "an up-to-date membership data bank would benefit many phases of the Society's work."<sup>757</sup>

Results followed quickly. HG Barbara Merrick implemented "genealogical calibration" in 1984, using a coding system to assess the accuracy of generational connections in the application database.<sup>758</sup> The process yielded a striking finding: only 15% of lineages were validated as Mayflower descendants.<sup>759</sup> Treated as internal data rather than an institutional scandal, this finding shaped subsequent quality-control investments without provoking a membership crisis. By 1988, the organization had implemented two further archival programs: the Microfiche Archival Project (MAP) and the Document Index Program (DIP), which together systematically preserved and indexed all lineage papers and primary documentation.<sup>760</sup>

The 1990s and early 2000s brought successive layers of digital infrastructure. In 1995, the library acquired CD-ROMs containing the Social Security Death Index and census mortality

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<sup>754</sup> The General Society of Mayflower Descendants. (1972) Historian General's Report. *The Mayflower Quarterly*. 38(4). p.117.

<sup>755</sup> The General Society of Mayflower Descendants. (1979) Five Generations Project News. *The Mayflower Quarterly*. 45(1). p.20;  
The General Society of Mayflower Descendants. (1980) GSMD Proceedings. *The Mayflower Quarterly*. 47(2). p.74.

<sup>756</sup> The General Society of Mayflower Descendants. (1980) Report of Governor General. *The Mayflower Quarterly*. 46(4). p.209.

<sup>757</sup> The General Society of Mayflower Descendants. (1982) Report of the Governor General. *The Mayflower Quarterly*. 48(4). p.197.

<sup>758</sup> The General Society of Mayflower Descendants. (1984) Report of the Historian General. *The Mayflower Quarterly*. 50(4). p.203.

<sup>759</sup> *Ibid.*

<sup>760</sup> The General Society of Mayflower Descendants. (1988) Report of the Historian General. *The Mayflower Quarterly*. 64(4). p.365;  
The General Society of Mayflower Descendants. (1984) Report of the Historian General. *The Mayflower Quarterly*.  
50(4). p.203; GSMD Proceedings. (2006) *The Mayflower Quarterly*. 72(4). p.358.

schedules.<sup>761</sup> By 2000, the Computer Committee maintained both the DIP, distributed to state historians as an application research tool, and the newly operational Mayflower Integrated Database System (MIDS), developed with volunteer assistance.<sup>762</sup> The following year, the GSMD library held over 200 rolls of microfilm alongside 55 CDs of 1880 federal census data, and the organization introduced WordPerfect and Microsoft Office templates to enable immediate digitization of applications on receipt by the HG's office.<sup>763</sup> State-level computerization followed in 2002–2003 through an Access database template for state historians, with electronic reporting of approvals and membership numbers added thereafter. However, adoption was uneven, with 50% of state historians still preferring postal reporting and ten lacking email or computer access altogether.<sup>764</sup> In 2006, the Massachusetts Society addressed the final limitation of the microfilm era, the inability to print from film, by partnering with the Genealogical Society of Utah to produce a fully digitized set, with a backup copy held at the FamilySearch Library in Salt Lake City, extending the decentralized preservation model that had anchored institutional resilience since 1947.<sup>765</sup>

## 9.8. Understanding Genetic Inheritance of Pilgrim DNA

The GSMD's engagement with genetic technology began as an institutional initiative rather than a passive response to member demand, a distinction that separated its approach from most comparable organizations.<sup>766</sup> In 2001, the HG contracted with Oxford Ancestors to conduct Y-chromosome (yDNA) testing on willing members, the product of five years of preliminary work.<sup>767</sup> By 2002, GSMD had become "the first major American heritage organization to use some of the newest discoveries in the science of genetics" for genealogical research.<sup>768</sup> Initial yDNA testing targeted male members whose surnames matched those of Mayflower passengers (Alden, Allerton, Hopkins, Standish, and Warren) and compared their DNA with living men of the same surnames in England to identify potential surviving male relatives of the passengers.<sup>769</sup> The HG simultaneously donated blood and lineage samples to Scott Woodward's Molecular

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<sup>761</sup> The General Society of Mayflower Descendants. (1995) Report of the Library Acquisitions Committee. *The Mayflower Quarterly*. 61(4). p.331.

<sup>762</sup> The General Society of Mayflower Descendants. (2000) Report of the Computer Committee. *The Mayflower Quarterly*. 66(4). p.374; The General Society of Mayflower Descendants. (2000) Report of the Computer Committee. *The Mayflower Quarterly*. 66(4). p.375.

<sup>763</sup> The General Society of Mayflower Descendants. (2001) GSMD Library at Plymouth Nerve Center of Our Society. *The Mayflower Quarterly*. 67(2). p.209; The General Society of Mayflower Descendants. (2001) Report of the Computer Committee. *The Mayflower Quarterly*. 67(4). p.374.

<sup>764</sup> The General Society of Mayflower Descendants. (2002) Report of the Computer Committee. *The Mayflower Quarterly*. 68(4). p.352; The General Society of Mayflower Descendants. (2003) Report of the Historian General. *The Mayflower Quarterly*. 69(4). p.455.

<sup>765</sup> The General Society of Mayflower Descendants. (2006) Massachusetts Society of Mayflower Descendants Digitization Project. *The Mayflower Quarterly*. 72(4). p.358.

<sup>766</sup> See Chapter 3, Section 3.1 for discussion of the post-2000 consumer DNA testing market.

<sup>767</sup> The General Society of Mayflower Descendants. (2001) Report of the Historian General. *The Mayflower Quarterly*. 67(4). p.368.

<sup>768</sup> The General Society of Mayflower Descendants. (2002) New Technology Addresses Old Questions. *The Mayflower Quarterly*. 68(2). p.121.

<sup>769</sup> *Ibid.*

Biology Program at Brigham Young University, extending the research into academic collaboration.<sup>770</sup>

A 2006 Oxford Ancestors analysis clarified the inheritance principles underpinning this work: while Mayflower descendants may carry only fractional genomic inheritance from passengers, "no one but Mayflower descendants can inherit copies of Mayflower genes," with same-sex lineages producing 100% certainty, mitochondrial DNA through unbroken female lines, and yDNA through unbroken male lines.<sup>771</sup> For descendants with a single Mayflower ancestor, the probability of inheriting any passenger genes was 1/47, rising with each additional ancestor identified.<sup>772</sup> This scientific framework shaped the committee's understanding of what DNA could and could not prove, an important corrective against overstating the strength of genetic evidence.<sup>773</sup> By 2005, the Mayflower Pilgrim DNA Committee had moved into targeted lineage research, with yDNA analysis resolving long-standing questions for descendants of Timothy Winslow regarding his family relationship with John Winslow.<sup>774</sup>

In 2006, the committee collaborated with the International Society of Genetic Genealogy (ISOGG) to develop guidelines for the use of DNA in genealogical research.<sup>775</sup> The following year, GSMD launched its Mayflower Y-DNA website through Family Tree DNA in May and added mtDNA testing in August 2007, beginning the transition away from Oxford Ancestors toward a more sustainable long-term partnership.<sup>776</sup> The Samson Kindred Y-chromosome DNA Project, launched in June 2007, illustrated the methodology in practice: targeting descendants of Pilgrim Henry Samson and Abraham Sampson to establish a yDNA baseline, with female-line descendants required to provide a male relative to represent the line.<sup>777</sup>

The organization also recognized that reproductive technology was generating potential Mayflower descendants outside its existing policy framework. The Reproductive Technology Committee, established under GG Ed Sullivan, addressed IVF conceptions and other novel arrangements — formalizing by 2014 the first official GSMD policies distinguishing DNA evidence for lineage confirmation from DNA evidence for membership applications, a

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<sup>770</sup> The General Society of Mayflower Descendants. (2002) Report of the Historian General. *The Mayflower Quarterly*. 68(4). p.350.

<sup>771</sup> The General Society of Mayflower Descendants. (2006) On Inheriting Mayflower Genes: A Lesson in Human Genetics. *The Mayflower Quarterly*. 72(1). p.124.

<sup>772</sup> *Ibid.*

<sup>773</sup> The General Society of Mayflower Descendants. (2006) DNA and Lineages. *The Mayflower Quarterly*. 72(1). p.125.

<sup>774</sup> The General Society of Mayflower Descendants. (2005) Report of the Mayflower Pilgrim DNA Committee. *The Mayflower Quarterly*. 71(4). p.395; The General Society of Mayflower Descendants. (2005) Will DNA Prove Mayflower Ancestry? *The Mayflower Quarterly*. 71(4). p.417.

<sup>775</sup> The General Society of Mayflower Descendants. (2006) Report of the Mayflower Pilgrim DNA Committee. *The Mayflower Quarterly*. 72(4). p.409.

<sup>776</sup> The General Society of Mayflower Descendants. (2007) Report of the Mayflower Pilgrim DNA Committee. *The Mayflower Quarterly*. 73(4). p.376; The General Society of Mayflower Descendants. (2007) Report of the Historian General. *The Mayflower Quarterly*. 73(3). p.307.

<sup>777</sup> *Ibid.*

distinction of considerable importance given the hereditary organization subculture's foundational requirement of documented biological descent.<sup>778</sup>

By 2012, atDNA testing had been incorporated into GSMD policy, with the DNA Committee reporting that autosomal results could confirm ancestors five or six generations back and establishing the evidentiary standards for biological parentage.<sup>779</sup> In 2013, collaboration between the Mayflower DNA Project and the Women of the Mayflower Committee produced a database of mtDNA lineages, unbroken mother-to-daughter descent from Mayflower passengers, built against the Silver Books and other approved lineage records.<sup>780</sup> On 11 November 2015, the 395th anniversary of the Mayflower Compact signing, an independent ISOGG-member collaborative website launched to address outstanding questions in passenger genealogy and to support individuals seeking to understand genetic connections to passengers, including a proposal that the GSMD accept yDNA as proof of lineage where no paper trail exists.<sup>781</sup>

By 2016, the HG characterized DNA testing as "the next big genealogical tool" with "the potential to change genealogy fundamentally," and by 2017, organizational goals included enrolling every member and all Family Society partner members in the project.<sup>782</sup> The 2018 hiring of geneticist Dr. Jason Kolowski marked the institutional consolidation of this trajectory, transforming DNA research from a committee initiative into a staffed professional function.<sup>783</sup>

## 9.9. The Thanksgiving Mythos

People often conflate the lines between the Pilgrims and Puritans, with the sins of one group becoming attributed to the other. They were distinct groups with different approaches to their religious beliefs and social considerations. This distinction is vital to the GSMD, which

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<sup>778</sup> The General Society of Mayflower Descendants. (2009) Report of the Reproductive Technology Committee. *The Mayflower Quarterly*. 77(4). p.392; The General Society of Mayflower Descendants. (2009) Report of the Reproductive Technology Committee. *The Mayflower Quarterly*. 75(4). p.377; The General Society of Mayflower Descendants. (2014) Report of the Women of the Mayflower Committee. *The Mayflower Quarterly*. 79(2). p.260.

<sup>779</sup> The General Society of Mayflower Descendants. (2012) Report of the Mayflower DNA Committee. *The Mayflower Quarterly*. 78(4). p.361; LaVenture, Tom. (2015) Tracing ties to the Mayflower. *The Jamestown Sun*. 29 December. <https://www.proquest.com/wire-feeds/tracing-tiesmayflower/docview/1752205758/se-2?accountid=14116>: accessed 29 March 2024. [Note: footnote also carries the LaQua contextual observation.]

<sup>780</sup> The General Society of Mayflower Descendants. (2013) Mayflower DNA Project and the Women of the Mayflower Committee. *The Mayflower Quarterly*. 79(2). p.311; The General Society of Mayflower Descendants. (2013) Report of the Reproductive Technology Committee. *The Mayflower Quarterly*. 79(2). p.312.

<sup>781</sup> MayflowerDNA.org. (2024) *Mayflower DNA Project: About*. Mayflower Y-DNA and mtDNA wiki. [https://mayflowerdna.org/wiki/index.php/Mayflower\\_DNA:About](https://mayflowerdna.org/wiki/index.php/Mayflower_DNA:About): accessed 16 December 2024.

<sup>782</sup> The General Society of Mayflower Descendants. (2017) Mayflower DNA Update. *The Mayflower Quarterly*. 83(3). p.7. Philip LaQua, Governor of the Mayflower Society of North Dakota, observed that future Mayflower certifications would likely require DNA evidence as the most accurate form of verification, and that while DNA testing is often complex, it would ultimately help those without documentary proof establish a link to Mayflower passengers.

<sup>783</sup> The General Society of Mayflower Descendants. (2018) Report of the Historian General. *The Mayflower Quarterly*. 84(1). p.14.

continues to navigate shifting attitudes toward American history and the legacy of the Pilgrims, the Mayflower, and the treatment of Native Americans.

As Cameron McWhirter observed in 2023, “In recent years, the Mayflower legacy has grown more fraught amid a general reassessment of America’s origins...the antithesis of American principles.”<sup>784</sup> This is a critical distinction, particularly in light of the complex history of Thanksgiving in the United States, a narrative of evolving traditions, national identity formation, and shifting cultural meanings. This historical challenge parallels, in some respects, the controversies the NSDAR faced regarding its historic exclusion of African American members, examined in Chapter 8, though the specific historical legacies at stake differ substantially.

Many know that the Thanksgiving story involves the Pilgrims and their Wampanoag neighbors celebrating their survival after a challenging first year in Plymouth.<sup>785</sup> However, before Abraham Lincoln’s proclamation in 1863, making it a national holiday, Thanksgiving was a regional holiday celebrated primarily in New England and to some extent in the Mid-Atlantic states. As discussed in Chapter 2, the Progressive Era of roughly 1890-1920 saw the formation of numerous patriotic hereditary societies, including the GSMD. During the same period, the Pilgrims’ story became increasingly central to Thanksgiving celebrations. William DeLoss Love, a Congregationalist minister and member of the SAR, published *The Fast and Thanksgiving Days of New England* in 1895, arguing that Plymouth was the birthplace of Thanksgiving and that the New England family of the past was “one of the noblest forms of family life known in history.”<sup>786</sup>

Schoolteachers across the nation began teaching the Pilgrim story to their pupils, claiming that the Pilgrims believed in the democratic ideal as evidenced by their creation of the Mayflower Compact. Through classroom activities, art projects, and pageants, children learned a particular narrative about Thanksgiving that emphasized “our Pilgrim forefathers and our Puritan roots,” often conflating Pilgrims and Puritans despite their differences.<sup>787</sup> This integration into the American educational system is where the conflation between Puritans and Pilgrims began, a distinction the GSMD has sought to rectify as it navigates and works to heal ties with the Native American communities still in Plymouth.

For New England Native Americans, Thanksgiving represents a more complex and often painful history. Since 1970, the United American Indians of New England (UAINE) has

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<sup>784</sup> McWhirter. *op. cit.*

<sup>785</sup> Pleck, Elizabeth. (1999) The Making of The Domestic Occasion: The History of Thanksgiving in the United States. *Journal of Social History*. 32(4). p. 775. <http://www.jstor.com/stable/3789891>: accessed 2 February 2024.

<sup>786</sup> *Ibid.*

<sup>787</sup> *Ibid.*

organized a “National Day of Mourning” on Thanksgiving to bring attention to the history of the Wampanoag and other Indigenous peoples who faced war, disease, and ethnic cleansing following European colonization.<sup>788</sup> This perspective challenges the romanticized myth of the first Thanksgiving that emerged in the mid-1800s and was adopted by the founders of the GSMD, which portrayed the 1621 harvest event as a friendly feast between Pilgrims and generic “Indians.”<sup>789</sup>

According to historian Michael Carrafiello, there is a crucial distinction between the two European groups and how they treated indigenous populations during their initial encounters.<sup>790</sup> Pilgrims were a division of the Puritan movement who chose to separate themselves from the Church of England; the moniker reflected their willingness to travel from home to practice their religion as they saw fit. Their decision to leave Leiden for the American Colonies was spiritual, driven by the desire to form their own church. Of the 102 passengers aboard the Mayflower, only 40 were “Pilgrims” in this sense, the remaining 65 had no interest in their religious project.<sup>791</sup> Falling short of their intended destination of Jamestowne, none would have survived the first New England winter without Native American intervention, and early accounts from the Pilgrims, including Edward Winslow’s, described their Wampanoag neighbors with a respect that differed substantially from the attitudes of the Puritans who followed.<sup>792</sup>

The Great Migration, beginning in 1628 as Puritans fled clashes with the church and King Charles I, blurred this crucial distinction. Tens of thousands immigrated to the Massachusetts Bay Colony with the intent to convert the Native Americans to their form of Christianity. By 1645, the Massachusetts Bay Colony had surrounded and then absorbed Plymouth Colony, merging its governing and religious ways with the Puritans’ more aggressive posture toward Indigenous peoples.<sup>793</sup> It was this merger, and the subsequent King Philip’s War, that initiated the colonial violence now often incorrectly attributed to the Pilgrim settlers the GSMD commemorates.

Over the past 30 years, the GSMD has sought to evolve its relationship with Native American communities, as demonstrated by significant milestones and initiatives. For Indigenous peoples, particularly those from the Wampanoag Nation (see Figure 50), the dominance of the

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<sup>788</sup> Newton, Creede. (2020) Indigenous say ‘no thanks, no giving’ 400 years after Mayflower. *Al Jazeera*. 26 Nov. <https://www.mayflower400uk.org/education/native-america/2020/july/wampanoag-and-mayflower-400/>: accessed 14 May 2024.

<sup>789</sup> Smithsonian Institution. (1998) Thanksgiving: From Local Harvests to National Holiday. *Thanksgiving in North America*. <https://www.si.edu/spotlight/thanksgiving/history>: accessed 14 May 2024.

<sup>790</sup> Carrafiello, Michael. (2024) Pilgrims and Puritans differed in their views on religion and respect for Native Americans: Thanksgiving began as a solemn occasion. It was not a holiday. *Time*. 28 November. <https://coloradonewslines.com/2024/11/28/pilgrims-puritans-religion-native-americans/>: accessed 2 February 2025.

<sup>791</sup> *Ibid.*

<sup>792</sup> Stratton, Eugene Aubrey. (1986) *Plymouth Colony: Its History and People 1620-1691*. Provo, Utah: Ancestry Publishing, p. 19; Whittock, Martyn. (2019) *Mayflower Lives: Pilgrims in a New World and the Early American Experience*. New York: Pegasus Books, Ltd. pp. 195-196.

<sup>793</sup> Stratton. (1986) *op. cit.*

celebratory Pilgrim-centric Mayflower narrative can be painful. Hazel Currence, a Herring Pond Wampanoag Tribe Elder, has expressed: “We were exposed to disease. We were exposed to slavery. I mean, what happened here was people who came not just for religion, that might have been their purpose of leaving their homeland, but they came here and wanted to wipe out the existence of a whole culture.”<sup>794</sup>



**Figure 50:** Map of the Native American territories about 1600. Grey dotted lines are approximate modern political boundaries. Nikater (2008) Tribal Territories Southern New England.png Wikimedia Commons. <https://en.m.wikipedia.org>: accessed 12 January 2026.

There is potential for the GSMD to shift its focus from pride to more critical reflection on its ancestry. As Wilday suggests, “If there could be a shift away from pride and toward more critical reflection, and then action based on that critical reflection, this community could potentially be mobilized to fight on the frontlines for decolonization.”<sup>795</sup> These developments represent a significant evolution in the relationship between the GSMD and Native American communities, demonstrating a growing recognition of shared history and shared responsibility for reconciliation.

<sup>794</sup> Goldman, David and Richer, Alanna Durkin. (2020) Mayflower at 400: Native American, Pilgrim descendants reflect. *The Christian Science Monitor*. <https://www.csmonitor.com/USA/Society/2020/1023/Mayflower-at-400-Native-American-Pilgrim-descendants-reflect>: accessed 1 April 2024.

<sup>795</sup> Wilday. *op. cit.* p. 122.

In 2019, the GSMD took a pivotal stance on contemporary issues affecting Native American communities by supporting the Mashpee Wampanoag Tribe in a land dispute. The Society backed congressional legislation to end legal challenges to approximately 321 acres of the tribe's reservation land. George P. Garmany Jr., the Society's governor general, referenced the historical significance of this support by citing the "only example of cooperation" in American history, the 1621 agreement between Europeans and Native Americans that led to 54 years of peace.<sup>796</sup> This action was significant to Mashpee Wampanoag Tribal Council Chairman Cedric Cromwell, who described it as a "truly historic moment" where Mayflower descendants stood alongside Wampanoag descendants, whose ancestors had brokered a long-lasting peace.<sup>797</sup>

### 9.10. 400 Years Since Landing

The 400th anniversary commemorations in 2020 marked a departure from previous celebrations by deliberately including the Wampanoag perspective, a viewpoint often overlooked in earlier observances.<sup>798</sup> In 2009, Wampanoag journalist and activist Paula Peters predicted this shift toward inclusivity when she addressed the Society's annual meeting. She explicitly acknowledged the harm to her community caused by the Mayflower passengers while calling upon Mayflower descendants to assume responsibility for reconciliation.<sup>799</sup>

The GSMD's engagement with the 400th anniversary of the Mayflower landing occurred during a period of intensified scholarly attention to Indigenous perspectives on Plymouth Colony history. Silverman's *This Land is Their Land* (2019) documented the Wampanoag experience of colonization, characterizing it as an unfolding "catastrophe" that transformed Indigenous life through disease, land dispossession, and violence.<sup>800</sup> This scholarship complicated celebratory narratives of Pilgrim-Indigenous relations that the GSMD and similar organizations had historically promoted. The traditional Thanksgiving narrative of peaceful coexistence, while containing elements of historical accuracy regarding the 1621 harvest celebration, obscured the subsequent decades of conflict culminating in King Philip's War (1675-1678), which devastated Wampanoag communities and fundamentally altered the region's demographic balance.<sup>801</sup>

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<sup>796</sup> Stening, Tanner. (2019) *Mayflower descendants back Mashpee tribe in land dispute*. Mashpee Wampanoag Tribe. 1 January. <https://mashpeewampanoagtribe-nsn.gov/january-2019-mittark-blog/2019/1/1/mayflower-descendants-back-mashpee-tribe-in-land-dispute>: accessed 14 May 2024.

<sup>797</sup> *Ibid.*

<sup>798</sup> Macall, Peter C. (2020) The complicated legacy of the Pilgrims is finally coming to light 400 years after they landed in Plymouth. *The Conversation*. <https://www.proquest.com/newspapers/complicated-legacy-pilgrims-is-finallycoming/docview/2487144471/se-2?accountid=14116>: accessed 29 March 2024.

<sup>799</sup> Wilday. *op. cit.*

<sup>800</sup> Silverman, David J. (2019) *This Land is Their Land: The Wampanoag Indians, Plymouth Colony, and the Troubled History of Thanksgiving*. New York: Bloomsbury Publishing. pp. 1-15.

<sup>801</sup> King Philip's War resulted in approximately 40% casualties among Wampanoag and allied Indigenous populations, fundamentally transforming New England's colonial landscape. See Silverman (2019), pp. 325-350.

The GSMD's response to this scholarly context during the 400th anniversary planning reflected institutional recognition that commemoration required Indigenous partnership rather than mere acknowledgment. The organization's collaborative approach with Wampanoag tribal representatives represented a departure from earlier commemorative practices that had centered on Pilgrim descendants while marginalizing or romanticizing Indigenous presence.<sup>802</sup> Whether this collaboration constituted genuine reconciliation or strategic adaptation to changing commemorative expectations remains subject to interpretation, but the organizational choice to pursue partnership rather than unilateral celebration marked a meaningful evolution from earlier anniversary observances.

Blee and O'Brien's scholarship on "monumental mobility" and Mayflower memory provides an analytical framework for understanding how the GSMD's commemorative practices have evolved across the organization's history.<sup>803</sup> Their research demonstrates how Mayflower memory has served shifting purposes across American history, from nineteenth-century assertions of Anglo-Saxon superiority to twentieth-century claims of democratic founding principles. The Mayflower narrative proved remarkably adaptable: the same historical events could support arguments for nativist restriction (emphasizing the Pilgrims' English Protestant identity) or pluralist inclusion (emphasizing the Pilgrims' flight from religious persecution).<sup>804</sup> The GSMD's own evolution during the study period, particularly its efforts to incorporate Indigenous perspectives and expand understanding of eligible lineages, reflects what Blee and O'Brien identify as the ongoing negotiation of Mayflower meaning in response to changing social contexts.

This milestone anniversary also prompted introspection among Mayflower descendants regarding their complex heritage. Member Olivia Musoke reflected on this duality: "Considering my ancestors helped incite the racial hierarchies that caused the need for these movements now, I do feel ashamed that that had to be part of history."<sup>805</sup> She noted that the pride she feels in descending from early settlers is diminished in many ways due to the role they took through manipulation and discrimination of people of color, which are embedded in the structures of today. Additionally, the Society's partnership with NEHGS yielded educational events commemorating the Mayflower landing, including exhibitions that explore the history,

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<sup>802</sup> The GSMD's 400th anniversary planning included consultation with Wampanoag Tribe of Gay Head (Aquinnah) and Mashpee Wampanoag Tribe representatives. See GSMD proceedings and anniversary documentation.

<sup>803</sup> Blee, Lisa. and O'Brien, Jean M. (2019) *Monumental Mobility: The Memory Work of Massasoit*. Chapel Hill: University of North Carolina Press; Blee, Lisa. and O'Brien, Jean M. (2021) Rethinking the Mayflower Legacy. *American Historical Review*. 126(2). pp. 490-517.

<sup>804</sup> The flexibility of Mayflower memory allowed the narrative to support contradictory political positions across American history. See Blee and O'Brien (2019) on how different groups mobilized Pilgrim heritage for varying purposes.

<sup>805</sup> Goldman and Richer *op. cit.*

usage, and meaning behind wampum belts, which scholars recognize as an integral part of living Indigenous traditions.<sup>806</sup>

The 2020 anniversary planning involved coordinated efforts from Plymouth, UK; Plymouth, Massachusetts; Leiden, Netherlands; and the Wampanoag Nations to meet and share commemoration plans.<sup>807</sup> The GSMD national 2020 Committee encouraged state societies to form their own 2020 committees and create activities for statewide celebrations.<sup>808</sup> As part of the celebrations, a bill to issue a U.S. coin commemorating the anniversary was introduced in the U.S. House of Representatives and U.S. Senate on July 8, 2015.<sup>809</sup> Titled the “Mayflower Commemorative Coin Act,” neither bill made it out of committee for a vote, unlike the celebration items created in the 1970s for the 350th anniversary.<sup>810</sup> To date, no anniversary coin has been minted, most likely another casualty of the COVID-19 pandemic.

To further promote inclusiveness, events in Plymouth, Massachusetts, incorporated both Pilgrim commemorations and explicitly Indigenous programming, including a Wampanoag Ancestors Walk, an Indigenous History Conference and Powwow, and Thanksgiving Week events, alongside the maritime salute featuring the Mayflower II replica.<sup>811</sup> The non-profit Plymouth 400 Inc., established in 2011, collaborated with a 35-member State Commission to organize the celebrations.<sup>812</sup>

The Wampanoag people were to play a leading role in the Mayflower 400 anniversary, creating a four-nation commemoration among the Wampanoag Nation, the United States, the United Kingdom, and the Netherlands. Dusty Rhodes, chair of the Plymouth, Massachusetts 400th Commission, stated that “the inclusion of the Native American perspective is one of the truly unique aspects of this commemoration as, historically, this perspective has been mishandled and misrepresented.”<sup>813</sup>

One cornerstone of the anniversary was the creation of a new Wampum Belt, which toured England to help tell the Wampanoag story on English land. Projects such as *We Are The Land*, a community-led international theatre production featuring English citizens and members of the Wampanoag tribe, accompanied this initiative. Plymouth 400, the local non-profit that had

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<sup>806</sup> American Ancestors. (2020) *Attend a 2020 Education Event with American Ancestors*. New England Historic and Genealogical Society. <https://mayflower.americanancestors.org/events-nehgs>; accessed 1 April 2024.

<sup>807</sup> Atkins. *op. cit.*

<sup>808</sup> The General Society of Mayflower Descendants. (2014) Report of the 2020 Committee. *The Mayflower Quarterly*. 80(4). p.259.

<sup>809</sup> The U.S. House of Representatives. (2015) *114th Congress Session. H.2980. To require the Secretary of the Treasury to mint coins in commemoration of the 400th anniversary of the arrival of the Pilgrims*. United States Congress. <https://www.congress.gov/114/bills/hr2980/BILLS-114hr2980ih.pdf>; accessed 2 May 2024.

<sup>810</sup> Roach, Steve. (2016) Legislation Calls for 2020-2021 Pilgrim Coins. *Coin World*. 8 July. <https://www.coinworld.com/news/us-coins/pilgrim-coin-introduced-legislation.html>; accessed 31 January 2025.

<sup>811</sup> Telford, William. (2018) Pilgrim Fathers honoured in USA. *The Plymouth Evening Herald*. 30 August. <https://www.proquest.com/newspapers/pilgrim-fathers-honouredusa/docview/2097021766/se-2?accountid=14116>; accessed 29 March 2024.

<sup>812</sup> *Ibid.*

<sup>813</sup> *Ibid.*

prepared for the commemoration for over a decade, stated that it had always planned to tell the story of the Mayflower and share the stories of the people impacted by the Pilgrims' arrival.<sup>814</sup> This represented a significant departure from previous commemorations, which had often marginalized or completely excluded Indigenous perspectives.

### 9.11. Conclusion

The GSMD's trajectory during the study period stands as a counternarrative to the reactive struggles that defined many comparable heritage organizations. Its distinctive combination of decentralized governance, research-focused culture, lower public profile, and institutional scale, approximately 30,000 members against the NSDAR's 190,000+, created conditions for proactive adaptation rather than crisis management.<sup>815</sup>

Within the hereditary organization subculture, the GSMD occupied an instructive position. Where popular platforms like Ancestry.com prioritized accessibility over evidentiary rigor, the GSMD maintained professional-grade research standards while simultaneously investing in tools, such as the Silver Books, the Mayflower Lineage Match, and the DNA project, that made those standards more achievable for qualified descendants. Where the Mormon genealogical community organized research as a religious obligation, as discussed in Chapter 1, the GSMD organized it around civic identity and scholarly achievement. Where African American genealogical societies have worked to recover records deliberately destroyed, the GSMD faced the inverse challenge: an organization founded to celebrate a particular colonial heritage must reckon with the consequences of that heritage for other communities. A reckoning with its engagement with the Wampanoag Nation, as it represents in practice.

Rather than lowering standards to attract members during periods of cultural change, the GSMD doubled down on genealogical rigor, a counterintuitive strategy that proved sustainable because members valued belonging to an institution whose exacting standards made membership meaningful. The gradual expansion of eligible lineages documented in Section 9. \_\_ demonstrated that inclusivity and scholarly integrity are not mutually exclusive, each change creating additional membership pathways while generating supplemental revenue. The Five Generations Project, begun in 1959, exemplifies this logic most clearly: what started as a modest documentation effort became the Silver Books series, now accepted as proof of lineage

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<sup>814</sup> Precious, Mandy. (2023) *Blog: We Are the Land – enabling the Wampanoag to tell their story*. Theatre Royal Plymouth. April. <https://theatreroyal.com/press/blogs/we-are-the-land/>: accessed 1 April 2024.

<sup>815</sup> Membership figures as of 2020. The NSDAR's larger scale creates both greater resources and greater organizational complexity compared to the GSMD.

by many other lineage societies and recognized as the gold standard for colonial American genealogical research.

The organization's decentralized structure, which initially appeared to limit national coordination, proved a durable resilience asset. The 1947 fire recovery, the gradual uneven adoption of technology across state societies, and the incremental reframing of Mayflower commemoration all reflect a bottom-up model that absorbs disruption without system-wide failure. Its support for Wampanoag tribal land rights, incorporation of Indigenous perspectives into the 400th anniversary commemoration, and acknowledgment of colonization's harmful consequences illustrate how a heritage organization can honor its founding mission while engaging critically with the historical record that mission requires.

Together, the NSDAR and GSMD case studies demonstrate that the paradox of democratic exclusion, organizations celebrating democratic and patriotic values while maintaining bloodline-based documentary requirements, is not a static institutional condition. It is an ongoing negotiation, shaped by organizational capacity, public visibility, and the willingness to engage with changing scholarly and social expectations. The GSMD's history suggests that smaller scale, research culture, and institutional obscurity, far from being liabilities, can become the conditions for a more coherent, durable form of organizational evolution.

## Chapter 10 The Paradox of Democratic Exclusion in American Lineage Culture

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The question of what it means to be a genuine American has animated debates about national identity since the Republic's founding. This dissertation has examined how hereditary organizations, particularly the NSDAR and GSMD, have positioned themselves as arbiters of authentic American heritage while deploying democratic and patriotic rhetoric to frame fundamentally exclusionary practices. The fifty-year period from 1970 to 2020 represents a turning point in American genealogical practice, fundamentally transforming the methodologies employed by researchers but also the very conception of who participates in genealogical inquiry, how institutional authority operates, and what constitutes legitimate historical investigation.

Understanding this transformation requires examining the broader context of how the relationship between history and genealogy continues to evolve. As Taylor and Crandall observed, this distinction was largely moot before the Civil War when "the genealogist, biographer, historian, and antiquarian were often the same person."<sup>816</sup> The subsequent fracturing of these roles in the late nineteenth century created disciplinary boundaries that continue to shape contemporary practice, even as technological innovation and demographic change have challenged these traditional divisions. Teachout's analysis reveals how hereditary organizations, from their nineteenth-century origins, sought to shape national political culture by selectively validating heritage, effectively shifting the meaning of Americanism towards American foundation events.<sup>817</sup>

The tension between democratic ideals and exclusionary practices represents what this study terms the paradox of democratic exclusion, the fundamental contradiction embedded in organizations that claim to celebrate American heritage while restricting membership based on bloodline documentation, economic resources, and social acceptability. As Hackstaff observes, genealogical practices have the potential to democratize collective memory and reveal social injustices, yet the organizations examined in this study have historically functioned to validate particular lineages while excluding others.<sup>818</sup> The central tension between history and genealogy emerges from what Mills identified as genealogy's distinctive "skills, knowledge base,

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<sup>816</sup> Taylor and Crandall. *op. cit.* p. 15.

<sup>817</sup> Teachout. *op. cit.* p. 134-135.

<sup>818</sup> Hackstaff. *op. cit.*

analytical principles, and evidentiary standards" that frequently are "not obtainable through any traditional academic program."<sup>819</sup>

This assertion finds empirical support in the survey data collected for this study, which is reported in Chapter 6, Section 4.3: 62.0% of participants view genealogy as a subset of historical inquiry, while 33.5% advocate for autonomous recognition. This division reflects ongoing debates about disciplinary boundaries and methodological legitimacy. As Anderson distinguished, genealogy concentrates on proving kinship relations while family history concerns the entire history of the studied family, suggesting complementary rather than competing approaches to understanding the past.<sup>820</sup>

The methodological approach employed in the review search, by combining demographic survey analysis of 1,164 participants with two institutional case studies, thirty-seven personal interviews, and historical documentation review, revealed complex patterns of transformation that resist simple narratives of either democratization or professionalization. The survey's respondent profile, while providing valuable insights into contemporary genealogical practices, reflects potential biases that limit generalizability to the broader genealogical community. The high proportion of participants with advanced degrees (78.9%) contrasts markedly with the general U.S. population, where only 14% hold advanced degrees, suggesting a significant overrepresentation of highly educated practitioners.<sup>821</sup> This educational skew aligns with Bourdieu's concept of cultural capital concentration, in which participation in certain leisure activities becomes self-selecting based on educational and economic resources.<sup>822</sup>

This dissertation addressed five interconnected research questions examining how genealogical practices and participation in lineage societies evolved between 1970 and 2020. The following sections address these questions thematically, demonstrating how hereditary organizations function as bounded subcultures within the broader genealogical ecosystem; examining contemporary organizational efforts toward inclusion; analyzing persistent structural tensions; and identifying directions for future research. A systematic summary of findings organized by research question appears in Section 11 of this chapter.

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<sup>819</sup> Mills (2002) *op. cit.* p. 83.

<sup>820</sup> Anderson, Robert Charles. (1986) The Place of Genealogy in the Curriculum of the Social Sciences. In: *Generations and Change*, Robert M Taylor Jr. and Ralph J. Crandall, eds. p. 85. Macon, GA: Mercer University Press.

<sup>821</sup> United States Census Bureau. (2023) *Educational Attainment in the United States: 2022*. Current Population Survey Annual Social and Economic Supplement. <https://www.census.gov/data/tables/2022/demo/educational-attainment/cps-detailed-tables.html>; accessed 21 July 2025.

<sup>822</sup> Bourdieu, Pierre. (1986) The Forms of Capital. In: *Handbook of Theory and Research for the Sociology of Education*. ed. J. Richardson. pp. 241-258. Westport, Connecticut: Greenwood.  
[https://home.iitk.ac.in/~amman/soc748/bourdieu\\_forms\\_of\\_capital.pdf](https://home.iitk.ac.in/~amman/soc748/bourdieu_forms_of_capital.pdf)

### 10.1. Hereditary Organizations as Bounded Subcultures

A critical finding of this research is that hereditary organizations represent a specific, bounded subculture within the broader American genealogical landscape rather than being representative of genealogical practice more broadly. This distinction carries significant analytical implications: patterns observed within hereditary societies cannot be generalized to the entire genealogical community, and the dynamics of bloodline-based membership organizations must be understood as one institutional form among many that Americans use to engage with family history.

The genealogical community encompasses diverse approaches to family history research, including African American genealogists navigating the documentary gaps created by slavery, Jewish researchers confronting Holocaust-era record destruction, Mormon practitioners engaged in religiously motivated ancestral work, ethnic diaspora communities maintaining connections to homelands, and professional genealogists serving diverse clientele. Each of these genealogical subcultures operates with distinctive methodologies, evidentiary standards, institutional structures, and relationships to broader social and political contexts. Hereditary organizations constitute one such subculture, characterized by formal verification processes, bloodline-based membership criteria, and organizational investment in particular historical narratives, specifically those validating Revolutionary, Colonial, or other foundational American experiences.

De Groot argues that genealogy, as practiced by millions globally, represents a democratization of access to the past, enabling ordinary people to engage in historical inquiry through personal connection.<sup>823</sup> Yet this democratizing impulse operates in tension with the gatekeeping functions that define hereditary organizations. Hjørthén's critical analysis of the paradigm of democratization in genealogical studies provides essential context for understanding this tension. He argues that scholars have too readily accepted narratives of genealogical democratization without examining how commercial interests and institutional structures capitalize on longing while maintaining exclusionary frameworks.<sup>824</sup>

The survey data demonstrate that contemporary practitioners have sophisticated educational backgrounds (78.9% hold university degrees). Yet approximately 80% report having no academic qualifications in genealogy, illustrating that genealogical expertise develops through kinship construction and practice rather than predetermined academic pathways. The finding, detailed in Chapter 6, Section 5, that over 90% of non-professional researchers identify as

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<sup>823</sup> De Groot. (2015) *Consuming History*. *Op.cit.* p. 103.

<sup>824</sup> Hjørthén, *op. cit.* p. 5.

intermediate or advanced practitioners, despite lacking formal genealogical training, challenges assumptions about the relationship between institutional credentials and historical competence.

Interview participant TK, an African American member who has served as a chapter registrar, observed these organizations distinguish between "the old guard, with a very specific view of how things are supposed to be" and "today's DAR," suggesting that generational transition offers a pathway toward organizational transformation.<sup>825</sup> This observation, first discussed in Chapter 7, Section 2.4, underscores how members themselves recognize the tensions between inherited institutional practices and contemporary organizational aspirations.

## **10.2. The Missing Middle: What Our Data Could Not Capture**

Despite the comprehensive mixed-methods approach employed in this study, significant limitations merit acknowledgment. The economic stratification within the sample, with significant overrepresentation of higher income brackets, may not capture the experiences of economically disadvantaged practitioners. This limitation is significant given the documented "missing middle" phenomenon, in which middle-income households reported the highest financial barriers (31.0%), suggesting that our understanding of how economic constraints shape genealogical participation may be incomplete.

The self-selected nature of participation, as noted in the methodology chapter, introduces additional bias, as those with strong feelings about genealogical institutions may have been more likely to participate. This self-selection potentially amplifies specific perspectives while muting others, particularly those of casual practitioners or individuals with ambivalent relationships with heritage organizations. The fifty-year study period (1970-2020) presented significant challenges in accessing consistent documentation, particularly for the pre-digital era. Gaps in annual proceedings data limited quantitative analysis of membership trends during crucial periods of organizational transformation.

The geographic concentration of responses, with Virginia showing the highest response rate due to the researcher's residence and lecture presentations, introduces regional bias that may limit national generalizability. Rural communities' underrepresentation is particularly significant given their disproportionate financial barriers (9.2% compared to 6.1% urban), suggesting that the findings may inadequately capture the experiences of practitioners in less densely populated areas. The absence of diverse perspectives constrains our understanding of how different communities navigate institutional barriers and develop alternative genealogical practices.

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<sup>825</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

### 10.3. The Transformation of American Genealogical Practice

The comparison with the 2001 Fullerton Genealogy Study reveals shifts in community composition that extend beyond statistical variation to represent a substantive reconceptualization of genealogical participation patterns. The survey data comparing the 2001 study with this research reveals substantial demographic shifts within the genealogical community. Female participation increased from 72.2% to 86.4%, reflecting broader patterns in women's engagement with heritage preservation activities. Economic stratification intensified dramatically: practitioners earning over \$100,000 annually grew from 13.4% to 35.9%, while middle-income participation (\$20,000-\$40,000) declined from 23.1% to 7.1%.

This economic stratification, documented in Chapter 5, Section 4, aligns with patterns Cortada identified across multiple American hobbies. In his analysis in *Everyday Information*, Cortada notes that by 2011, genealogy ranked behind only coin collecting, stamp collecting, and gardening in popularity, and that all these pursuits showed similar economic stratification.<sup>826</sup> By comparing genealogy to other hobbies, we can see how financial resources shape who participates. Just as access to certain leisure activities correlates with economic capacity, the subscription services, historical documents, and research time needed for genealogy create participation barriers that financial resources can either overcome or reinforce.

The identification of distinct generational cohorts in Chapter 5, Section 1.3, provides insight into how technological and cultural timing shaped genealogical methodology. The primary cohort (born 1953-1964), representing 38.2% of surveyed researchers, began their research following Alex Haley's *Roots*, which, as documented in Chapter 3, Section 1, drew an estimated 130 million viewers and fundamentally altered public engagement with genealogical narratives. The identification of three distinct generational cohorts provides crucial insight into how historical timing shapes genealogical methodology and institutional relationships: the *Roots* Generation (those who began research between 1970 and 1989), the Digital Pioneers (1990-2009), and the DNA Era participants (2010-present).

As MC commented about professional development opportunities, in a quote first appearing in Chapter 5, Section 4.2: "Wish I could. They cost too much," illustrating how economic constraints limit access despite significant interest.<sup>827</sup> GB captured the economic dimension of organizational exclusion in testimony documented in Chapter 7, Section 2.1: "It's \$400 to join Jamestown... And you do \$150 just to apply... some people don't have that kind of money, so

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<sup>826</sup> Cortada. *op. cit.* p. 160.

<sup>827</sup> MC. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

already it's exclusive."<sup>828</sup> These observations demonstrate how economic barriers serve as de facto gatekeepers even when organizations maintain formally open membership criteria.

### 10.3. Why Women Dominate Contemporary Genealogical Practice

The increasing feminization of genealogical practice, from 72.2% female participation in 2001 to 86.4% in 2022, demands explanation, yet existing scholarship provides no definitive answer to why post-1970 genealogy attracts so many women. Several factors emerge from the research that merit consideration, though this question warrants dedicated future investigation.

Chambré's research on volunteerism identifies a sharp decrease in working-class volunteering and an increase in the desire to give back to causes and organizations that benefit themselves, friends, and family.<sup>829</sup> This shift toward causes benefiting one's own family aligns with genealogy's personal nature. When large numbers of women entered the workforce, it dramatically changed how Americans volunteered in their communities. This shift created two significant challenges for volunteer organizations: volunteers did not stay long, and those who did had little time to give. Chambré discovered these problems were not new at all; these same challenges have appeared repeatedly throughout American history whenever there has been a notable change in how people work.

Hackstaff notes the irony that "given genealogical amnesia of the female line, it is ironic that it appears to be women who mostly pursue family histories," suggesting that women's overrepresentation among genealogists may be an extension of their role as those most responsible for kinwork.<sup>830</sup> The workforce participation of women, documented in Chapter 5, Section 3, shows that by 1988, 75% of women aged 25-54 were either employed or seeking employment, fundamentally altering traditional patterns of voluntary engagement.

Interview participant BJ shared an experience that reveals how gendered stereotypes shape participation: "my husband tells me that all my hobbies are that of an 80-year-old woman. And I've just learned to accept this about myself. Um, and so being so young, but I started doing genealogy when I was sixteen, that's now more than half of my lifetime."<sup>831</sup> This observation illustrates how cultural perceptions of genealogy as a gendered activity intersect with age-based expectations, constraining and enabling participation.

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<sup>828</sup> GB. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>829</sup> Chambré. *op.cit.* pp. 387-388.

<sup>830</sup> Hackstaff (2010), *op. cit.* p. 665.

<sup>831</sup> BJ. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

#### 10.4. Communities of Practice, Hierarchies of Access

The contemporary genealogical landscape reveals a fundamental paradox: as technological innovations and cultural shifts have democratized access to family history research, the actual communities of practice have become increasingly stratified along economic, educational, and methodological lines. The economic stratification documented in the survey, with practitioners earning over \$100,000 annually growing from 13.4% to 35.9%, while representation from the \$20,000-\$40,000 bracket declined from 23.1% to 7.1%, aligns with patterns identified across multiple American hobbies.

The survey data, in Chapter 5, Section 4, showed the highest financial obstacles in the \$40,000-\$60,000 income bracket (31.0%), rather than among the lowest income groups, which demonstrates what economists identify as the "middle-class squeeze," where middle-income households face proportionally greater obstacles than either higher or lower income participants who find alternative pathways to participation. This phenomenon reflects broader patterns across American institutions, where participation by the middle class has decreased across multiple domains, from education to cultural institutions.

The genealogical field exhibits this pattern through the documented gap between certification interest (49%) and achievement (5%), with 42.9% of participants citing economic barriers. The integration of genetic genealogy represents a paradigm shift in genealogical methodology, fundamentally altering verification approaches while creating new tensions between traditional and scientific evidence. The survey reveals marked differences between professional practitioners (59.6% fully supporting DNA evidence) and hobbyist researchers (40.0%), with professionals demonstrating higher rates of routine DNA integration (69.6% vs. 35.0%) and lower methodological resistance (10.5% vs. 25.0%), as shown in Chapter 6, Section 2.2.

#### 10.5. The Resilience Puzzle: Thriving While Others Declined

The comparative analysis of lineage societies can be situated within Putnam's broader documentation of declining civic engagement. In *Bowling Alone*, Putnam documented a 59% decline in the General Federation of Women's Clubs membership since 1964, yet both NSDAR and GSMD have maintained or grown their membership during similar periods.<sup>832</sup> This resilience suggests that lineage societies possess unique characteristics, which Strange termed

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<sup>832</sup> Putnam. (2000) *op. cit.* p. 67.

the "will to descend," that create stronger institutional bonds than traditional voluntary associations.<sup>833</sup>

GSMD's proactive approach to DNA integration, beginning research partnerships in 2001 with Oxford Ancestors, exemplifies anticipatory management that positions organizations ahead of technological change. This contrasts with what Scodari describes as the tension between popular engagement and critical stance in genealogy media, where institutions must navigate between accessibility and scholarly rigor.<sup>834</sup> The organization's systematic approach to DNA testing, from initial mtDNA and Y-DNA studies to formal policy adoption by 2016, demonstrates how institutions can integrate innovation while maintaining genealogical standards.

The NSDAR's successful integration of digital tools reduced application processing time from 13 weeks to 6, while maintaining verification standards, demonstrating that efficiency and rigor can reinforce each other rather than compete. The documented divide between professionals and hobbyists in DNA acceptance reflects deeper epistemological questions about what constitutes genealogical proof. These developments show how heritage organizations have adapted to technological change while maintaining their fundamental character as gatekeepers of validated American heritage.

## 10.6. Contemporary Organizational Efforts Toward Inclusion

The NSDAR's 2008 publication of an expanded edition of *Forgotten Patriots: African American and American Indians in the Revolutionary War* included more than 6,600 names of minority patriots, representing a significant institutional effort to acknowledge diverse contributions to American independence.<sup>835</sup> This publication, discussed in detail in Chapter 8, Section 3.2, demonstrates organizational commitment to expanding recognition of Revolutionary-era service beyond traditional narratives.

Interview participant ME, a fifth-generation member with Native American heritage, offered a nuanced perspective that adds important context to understanding these organizations' historical significance. Her grandmother joined in 1943 because the NSDAR was "the only women's group she could join... because of her race," since membership was lineage-based rather than requiring social approval.<sup>836</sup> This observation, first discussed in Chapter 7, Section 2.3, reveals

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<sup>833</sup> Strange. (2014) *Sisterhood of Blood*. *op. cit.* p.108.

<sup>834</sup> Scodari. (2018) *op. cit.* p. 45.

<sup>835</sup> National Society Daughters of the American Revolution. (2008) *Forgotten Patriots: African American and American Indians in the Revolutionary War*. Expanded edition. Washington, DC: NSDAR.

<sup>836</sup> ME. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

how the very structure of bloodline-based membership paradoxically enabled women who faced exclusion from other voluntary associations due to social or economic status to gain access.

The GSMD's establishment of a Wampanoag Advisory Committee in 2019 represents institutional recognition of Indigenous perspectives on commemorating events that Indigenous peoples experienced as colonization and displacement.<sup>837</sup> This development, detailed in Chapter 9, Section 4.1, illustrates how contemporary organizations are working to incorporate previously marginalized voices into their commemorative activities. These contemporary efforts demonstrate genuine institutional evolution, even as the gap between national policies and local practices persists.

Interview participant CC captured the sense of transformation many members perceive: "It is a whole lot easier to do solid research and primary sources than it was when I started 40 years ago... When researching, you had to, you know, go places."<sup>838</sup> This observation, first appearing in Chapter 6, Section 1.2, reflects broader changes in research accessibility that have affected both individual practitioners and organizational operations.

### **10.7. The Persistence of Structural Tensions**

Despite contemporary inclusion efforts, structural tensions persist between national organizational policies and local chapter practices. Survey data reveal that member-level discrimination (14.0%) exceeds chapter-level discrimination (8.1%), suggesting that formal policy changes have not fully transformed organizational culture at the interpersonal level. Political discrimination emerges as the most prominent form of exclusion, accounting for 33% of chapter-level and 46% of member-level incidents, as documented in Chapter 7, Section 2.4.

The forms of discrimination reported by participants extend beyond political differences to include social class, age, gender, sexuality, ethnicity, and regional identity. This suggests that exclusionary practices operate across multiple dimensions. Survey participants reported experiencing discrimination across multiple categories, with one noting exclusion "due to my ethnicity, due to my religion, due to my politics," indicating that various forms of bias can compound to create more significant barriers to participation.<sup>839</sup>

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<sup>837</sup> The General Society of Mayflower Descendants. (2019) Wampanoag Advisory Committee Established. *The Mayflower Quarterly*. 85(3). See Chapter 9, Section 4.1 for detailed discussion.

<sup>838</sup> CC. (2022) Interviewed by S. Combs-Bennett. 11 July. Zoom.

<sup>839</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

As TK observed in testimony first presented in Chapter 7, Section 2.4: "And as you can imagine in those areas where our politics are divided, people have had a harder time. You have members who are being asked, how did they get here?"<sup>840</sup> This observation reveals how political polarization manifests within organizations that ostensibly unite members around shared heritage rather than contemporary political alignment.

Interview participant SZ suggested potential approaches that merit organizational consideration: "one thing our groups could do is help us develop a new, like vision of ourselves as a country, because we are about ancestry heritage to a large degree. And right now, the division of the country is ripping us apart... maybe heritage groups could have some purpose in helping create that sense of identity that's unifying."<sup>841</sup> This aspiration, first discussed in Chapter 7, Section 2.5, suggests that members themselves envision heritage organizations as potential bridges across contemporary divisions, a vision that organizational leadership could potentially develop.

Interviewees' discrimination experiences reveal how organizational culture perpetuates exclusion through interpersonal dynamics that official policies cannot easily address. LT's experience of dismissive treatment based on youth illustrates how age-based hierarchies create unwelcoming environments for younger members whose perspectives organizations claim to value. This ageism operates bidirectionally, as TK's observation of "reverse ageism" demonstrates younger members face exclusion from leadership opportunities regardless of their capabilities, with organizations treating them as perpetual "kids" whose readiness for responsibility requires senior validation rather than demonstrated competence.<sup>842</sup>

## **10.8. The Interdisciplinary Imperative**

Genealogy occupies an anomalous position within the contemporary knowledge landscape, simultaneously claiming space across multiple disciplines while belonging to none fully. The field's resistance to disciplinary containment creates both opportunities and obstacles, enabling methodological innovation while complicating claims to academic legitimacy and professional recognition.

The interdisciplinary imperative emerges from genealogy's inherent methodology, which necessarily traverses historical analysis, scientific verification, sociological interpretation, and cultural production. Yet this breadth generates persistent tensions between different epistemological frameworks and communities of practice. The fundamental distinction between

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<sup>840</sup> TK. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

<sup>841</sup> SZ. (2022) Interviewed by S. Combs-Bennett. 26 June. Zoom.

<sup>842</sup> See Chapter 7, Section 2.4 for full discussion of age-based discrimination patterns, including LT and TK observations.

history and genealogy requires examination through multiple theoretical lenses. HersHKovitz's taxonomy, which positions genealogy as spanning multiple research disciplines, provides a framework for understanding its interdisciplinary nature rather than treating it simply as a historical subset.<sup>843</sup>

This complexity is evident in the survey findings in Chapter 6, Section 3.3, which show that advanced degree holders have different orientations: 55.8% view genealogy as a subset of history, compared to 88.2% among those without advanced degrees, suggesting that academic training fosters appreciation for disciplinary boundaries. The microhistorical approach championed by Szijártó and Hatton offers a bridge between genealogical and historical methodologies. Szijártó attributes microhistory's popularity to its appeal to both the public and genealogists, noting how it enables exploration of ancestors' personal experiences within specific historical contexts.<sup>844</sup>

Interview participant NSW articulated this bridging function: "I see it as a two-prong approach... one is being very honest about history and not just including different perspectives in history... And the second part, I think, is just doing the research to understand what types of documentation can be available for diverse groups."<sup>845</sup> This observation, first appearing in Chapter 6, Section 3.4, illustrates how practitioners themselves navigate the intersection of historical rigor and inclusive documentation practices.

## 10.9. The Roots Effect and Beyond

The broadcast of Alex Haley's *Roots* in January 1977, drawing an estimated 130 million viewers, represents a watershed moment that fundamentally reconfigured American genealogical practice. Yet the transformation extends far beyond this singular cultural event, encompassing decades of subsequent social, technological, and institutional changes that have reshaped how Americans conceptualize and pursue family history. While *Roots* provided the initial catalyst for mass genealogical interest, the subsequent evolution of the field reveals complex patterns of inclusion and exclusion, innovation and resistance, democratization and stratification that continue to shape contemporary practice.

The "Roots effect" represents not a discrete historical moment but an ongoing process where traditional genealogical institutions negotiate with emerging constituencies, established

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<sup>843</sup> HersHKovitz. (2012) *op. cit.* p. 5.

<sup>844</sup> Szijártó, István. (2002) Four Arguments for Microhistory. *Rethinking History*. 6(2). p. 210. <https://doi.org/10.1080/13642520210145644>; accessed 21 January 2021.

<sup>845</sup> NSW. (2022) Interviewed by S. Combs-Bennett. 6 July. Zoom.

methodologies confront technological innovations, and aspirational inclusivity collides with persistent structural barriers. The documented impact on library usage, with libraries experiencing 50% increases in visitors following *Roots*, demonstrates the immediate cultural resonance of the series, as discussed in Chapter 3, Section 1. Yet the continued underrepresentation of diverse practitioners in lineage societies suggests that cultural moments alone cannot overcome entrenched institutional patterns.

Five intersecting dynamics characterize the post-*Roots* genealogical landscape. First, urbanization and geographic mobility have disrupted traditional patterns of intergenerational knowledge transmission, necessitating formalized research approaches that privilege those with educational and technological capital. Second, economic stratification has created distinct tiers of participation, with middle-income practitioners facing proportionally greater barriers than either affluent or low-income participants. Third, cultural movements toward inclusive historical narratives encounter institutional resistance, creating tensions between national policies and local practices within heritage organizations.

Fourth, continued media representations from *Who Do You Think You Are?* to *Finding Your Roots* sustain public interest while potentially reinforcing rather than challenging existing participation patterns. The finding that media influence correlates with application surges but not with demographic diversification suggests, as Scodari argues, that popular genealogy media may reinforce rather than challenge existing participation patterns.<sup>846</sup> Finally, the emergence of genetic genealogy has introduced new verification methodologies that fundamentally challenge traditional documentary-based approaches while raising profound questions about the nature of kinship and belonging. Together, these dynamics reveal how the democratizing promise of *Roots* continues to encounter structural realities that complicate its revolutionary potential.

#### **10.10. Truth and Reconciliation, Genealogical Style**

The institutional evolution from exclusionary practices toward more inclusive historical narratives demonstrates how traditional organizations negotiate between historical preservation and social progress. NSDAR's acknowledgment of 6,600 minority patriots in *Forgotten Patriots* and GSMD's inclusion of Wampanoag perspectives in 400th-anniversary commemorations represent meaningful steps toward a comprehensive historical understanding. Yet these developments occur within a broader pattern of institutional reckoning that extends beyond hereditary societies to encompass the entire genealogical establishment.

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<sup>846</sup> Scodari (2018), *op. cit.* p. 45.

The National Genealogical Society's (NGS) formal apology in May 2023, issued three years after the temporal boundaries of this study, provides crucial validation of the persistent patterns documented throughout this research. After 120 years of operation, the nation's premier genealogical organization acknowledged its history of systematically excluding Black genealogists and other marginalized groups from conferences, publications, and leadership positions. NGS President Kathryn M. Doyle's acknowledgment that these practices caused "harm, pain, and alienation" to genealogists of color demonstrates that the discrimination patterns identified in lineage societies reflected field-wide structural barriers rather than organization-specific phenomena.<sup>847</sup>

This institutional reckoning reveals the profound gap between formal policies and enacted practices that characterizes American genealogical organizations. While the NGS had technically been open to all researchers since its 1903 founding, the organization's own historical review documented decades of deliberate exclusion, including segregated conference facilities, rejection of research focused on enslaved ancestors, and systematic barriers to leadership participation. These practices parallel the chapter-level discrimination documented in Chapter 7, Section 2.4, where 33% of survey respondents reported political discrimination at local levels despite national non-discrimination policies, suggesting that exclusionary practices operate through informal mechanisms that persist long after formal barriers fall.

As historian Kendra Field observed regarding the NGS apology, "Genealogy has been central to how Americans have made meaning of race, belonging and national identity," making these organizations' discriminatory practices particularly significant in shaping who could claim American heritage.<sup>848</sup> The movement toward institutional acknowledgment extends beyond individual organizations and represents a genealogical truth-and-reconciliation process that continues to unfold.

### 10.11. Public Trees, Private Lives

Genetic genealogy's implications extend beyond methodological transformation to fundamental questions about privacy, identity, and family definition. The 2018 *Science* study, which revealed that databases containing just 2% of a population could enable the identification of nearly any individual within that demographic group, raises profound privacy concerns.<sup>849</sup> Yet

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<sup>847</sup> National Genealogical Society. (2023) Our Journey From Exclusion to Inclusion. *National Genealogical Society*. 20 May. <https://www.ngsgenealogy.org/towards-a-fully-inclusive-genealogy-community/>; accessed 23 May 2023.

<sup>848</sup> Trent, Sydney. (2023) A major group of family genealogists apologizes for past racism. *The Washington Post*. 31 May. <https://www.washingtonpost.com>; accessed 15 June 2023.

<sup>849</sup> Erlich, Yaniv, et. al. (2018) Identity inference of genomic data using long-range familial searchers. *Science*. 11 October. 362(6415). pp.690-694. DOI: 10.1126/science.aau4832. Johnson, Carolyn Y. (2018) Even If You've Never Taken a

as investigative genetic genealogist CeCe Moore observed, academic studies often overlook "the complexities of doing the actual work" and make "assumptions that aren't in line with reality."<sup>850</sup>

The documented shift from intergenerational knowledge transfer to formalized research approaches reflects broader changes in how families maintain historical connections. Digital transformation has created "networked genealogy," a system where individual research contributes to collective knowledge while raising questions about ownership, privacy, and the commodification of family history through commercial platforms.

Interview participant BH reflected the tension between traditional and genetic approaches: "to me, you know, inherently a lineage society is by blood relatives, not by adopted relatives... I think that potentially if you went by adopt, if you allowed adoptees to follow their adoptive parents lineage, that will open up a can of worms."<sup>851</sup> This perspective, first discussed in Chapter 9, Section 3.2, contrasts with Sheppard's inclusive definition of family that encompasses those connected through marriage and adoption, illustrating ongoing negotiations about family definition in the genetic age.

### **10.12. Mirror to the Nation: What Genealogy Reveals About America**

Genealogy functions as more than a method for tracing familial connections; it serves as a revealing mirror that reflects America's deepest tensions about identity, belonging, and historical truth. The patterns documented throughout this analysis, persistent discrimination alongside inclusive rhetoric, technological democratization meeting structural barriers, and institutional resilience masking internal fractures, are not anomalies within genealogical practice but rather microcosms of broader American struggles with diversity, equity, and the meaning of heritage in a pluralistic society.

Through examining how genealogical institutions and practitioners navigate these tensions, we gain insight into how America itself grapples with the distance between its founding ideals and lived realities. Heritage organizations serve as case studies in the evolution of civic engagement, illustrating tensions between merit-based and inherited membership criteria. The documented skepticism about the premises of lineage societies, with participants often questioning the

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DNA Test, A Distant Relative Could Reveal Your Identity. *The Washington Post*. 22 October. <https://www.washingtonpost.com/science/2018/10/11/even-if-youve-never-taken-dna-test-distant-relatives-could-reveal-your-identity/>

<sup>850</sup> Johnson, Carolyn. *op. cit.*

<sup>851</sup> BH. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

personal benefits of celebrating an ancestor's achievements, reflects broader cultural debates about the relationship between individual achievement and ancestral legacy.

These discrimination patterns reflect what Finkel and colleagues identify as "political sectarianism," a primary form of social sorting in modern American society.<sup>852</sup> This trend challenges heritage organizations' capacity to serve as unifying forces around shared historical heritage while navigating contemporary political polarization. The sophisticated skepticism regarding institutional documentation (only 26.0% considering lineage society applications definitive proof despite 59.2% usage rates as discussed in Chapter 7, Section 3.4) reveals how research communities develop critical frameworks for evaluating sources.

### 10.13. Developments Since 2020

While this dissertation's primary study period encompasses 1970 to 2020, significant developments since then merit acknowledgment as context for understanding ongoing transformations. The COVID-19 pandemic accelerated digital transformation within hereditary organizations, with MC observing that "having these virtual meetings... is really useful even beyond COVID."<sup>853</sup> This shift potentially reduces geographic and economic barriers to participation by enabling engagement without travel costs.

In 2023, debates emerged within the NSDAR regarding transgender membership eligibility, reflecting broader societal tensions about gender identity and organizational belonging. The controversy emerged after some members of the Cheyenne, Wyoming chapter circulated a petition attempting to exclude transgender members. Despite national leadership's clarification that the organization's bylaws, which specify membership for women who can prove lineal descent, encompass transgender women who meet genealogical requirements, some members felt the acceptance of a birth certificate stating an applicant was female was a loophole that needed to be closed.<sup>854</sup>

Support for inclusion demonstrates the majority's acceptance of evolving gender definitions. Yet the necessity of bylaw changes to anti-discrimination clauses, and the subsequent organized resistance to them, reveal how the pattern of national inclusion policies meeting chapter-level resistance documented throughout this study continues to manifest as organizations encounter

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<sup>852</sup> Finkel, et al. *op. cit.*

<sup>853</sup> MC. (2022) Interviewed by S. Combs-Bennett. 3 July. Zoom.

<sup>854</sup> Brockbank, Derek. (2024) When the DAR Said Trans Women Were Allowed, Controversy Ensued. *Washingtonian*. 8 January. <https://www.washingtonian.com/2024/01/08/when-the-dar-said-trans-women-were-allowed-controversy-ensued/>; accessed 2 August 2025. See also: Wolfson, Leo. (2023) Cheyenne DAR Members Fight National Organization For Allowing Transgender Women. *Cowboy State Daily*, 11 October.

new questions about identity and belonging. The organization's statement that there were already a "handful" of transgender members at the time of the controversy suggests that, as with racial integration decades earlier, informal inclusion had preceded formal policy acknowledgment.

The NSDAR's navigation of transgender inclusion illustrates how heritage organizations remain sites of contested cultural values, with membership criteria serving as proxies for broader societal debates about gender, tradition, and American identity. This contemporary challenge confirms that the fundamental tensions identified in this research (between institutional tradition and social change, between national policy and chapter autonomy, between inclusive ideals and exclusive practices) represent structural features of heritage organizations rather than historical artifacts.

#### **10.14. The Range of Organizational Remits and Activities**

While this dissertation focused on two case study organizations, the NSDAR and GSMD, hereditary organizations vary considerably in their range of activities and organizational purposes. The NSDAR maintains extensive educational programs, historic preservation activities, and patriotic service initiatives, in addition to its genealogical verification functions. GSMD focuses specifically on genealogical research, the publication of definitive lineage documentation, and the commemoration of Pilgrim heritage.

The United Daughters of the Confederacy (UDC), founded in 1894, illustrates how hereditary organizations can become entangled in contested historical memory, shaping contemporary perceptions of all lineage societies. As documented in Chapter 7, Section 2.2, the UDC's association with Confederate commemoration poses challenges for researchers seeking access to its archival holdings while grappling with the organization's historical role in Lost Cause mythology.

Interview participant WM, who maintains UDC membership despite reservations, observed: "I think if they don't make themselves more relevant, they're going to be in big trouble too... I don't even go to the meetings because I don't like what they do."<sup>855</sup> This observation, first appearing in Chapter 7, Section 2.2, illustrates how individual members navigate personal relationships with organizations whose institutional positions they may not fully support. The diversity among hereditary organizations, from those focused on Revolutionary service to those commemorating colonial settlement to those preserving Confederate heritage, means that

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<sup>855</sup> WM. (2022) Interviewed by S. Combs-Bennett. 23 June. Zoom.

generalizations about "lineage societies" must be qualified by attention to specific organizational contexts.

### 10.15. Summary of Research Question Findings

This dissertation addressed five interconnected research questions examining how genealogical practices and participation in lineage societies evolved between 1970 and 2020. The following summary presents key findings organized by research question, with references to the chapters where detailed analysis appears.

Research Question 1 examined generational transitions, urbanization, and family structures. Chapter 5 documented fundamental shifts in who participates in genealogical research. Female participation increased from 72.2% (2001) to 86.4% (2022). Three distinct generational cohorts emerged with different methodological orientations: the Roots Generation (1970-1989), Digital Pioneers (1990-2009), and DNA Era (2010-present). The hypothesis that changing family structures would shift knowledge acquisition toward institutional pathways was confirmed.

Research Question 2 addressed economic resources and social mobility. Chapters 5 and 7 confirmed that higher disposable income correlates with increased genealogical engagement, but with significant nuances. High-income participation (\$100,000+) grew from 13.4% to 35.9%, while middle-income participation (\$20,000-\$40,000) declined from 23.1% to 7.1%. The "missing middle" phenomenon emerged as a key finding, with the \$40,000-\$60,000 income bracket reporting the highest financial barriers (31.0%).

Research Question 3 examined how cultural movements promoting diversity affected hereditary organizations. Chapters 7, 8, and 9 examined these dynamics in detail. The hypothesis that external pressure would drive institutional adaptation was confirmed. However, the gap between national policies and local practices persists: member-level discrimination (14.0%) exceeds chapter-level discrimination (8.1%), indicating that formal policy changes have not fully transformed organizational culture at interpersonal levels.

Research Question 4 addressed media representations and participation patterns. Chapters 2 and 3 documented how media representations sustained public interest in genealogical research. Library visits increased 50% following the *Roots* broadcast. However, media influence correlated with interest but not demographic diversification, suggesting that media exposure alone does not address structural barriers to diverse participation.

Research Question 5 examined how technological advancements affected organizational standards. Chapters 6, 8, and 9 documented substantial changes in both individual research practices and organizational standards. Processing times decreased substantially (NSDAR: 13 to 6 weeks). The Board for Certification of Genealogists' 2014 acceptance of DNA evidence marked formal recognition of genetic genealogy's legitimacy as a verification methodology.

### **10.16. Limitations of This Study**

Despite the comprehensive mixed-methods approach employed in this study, significant limitations merit careful consideration. These constraints, while not undermining the validity of the findings, shape how the results should be interpreted and point to opportunities for future research that could address these methodological challenges.

Sample representativeness presents a primary limitation. Survey participants were recruited primarily through hereditary organization networks, creating potential self-selection bias. The high educational attainment (78.9% with advanced degrees) and income levels suggest the sample skews toward privileged demographics. The demographic homogeneity within the sample, shown in Chapter 5, Section 2.3, with Caucasian non-Hispanic participants comprising 94.85% of respondents, significantly limits our ability to understand how genealogical practice functions within diverse communities.

Temporal boundaries present another consideration. The primary study period of 1970-2020 excludes significant developments since, including the COVID-19 pandemic's acceleration of digital transformation, the NGS 2023 apology, and ongoing debates about transgender membership. These post-2020 developments, briefly discussed in Section 12, suggest that institutional transformation continues at a pace that warrants ongoing scholarly attention.

Case study selection, while analytically justified by the historical significance and extensive documentation of NSDAR and GSMD, cannot represent the full diversity of hereditary organizations. These organizations' resources and institutional infrastructure may not reflect the experiences of smaller lineage societies that lack comparable administrative capacity.

Archival access challenges proved a significant stumbling block. Permission to access lineage society archives varied considerably. The UDC provided only scanned copies of the registrar's reports, denying access to membership data. Many smaller organizations lack centralized archives, with records maintained in officers' homes rather than in institutional repositories. These limitations constrain our understanding of how organizations beyond the two case studies have navigated the transformations documented here.

### **10.17. Roadmaps for Reform**

The patterns documented throughout this analysis of economic stratification, methodological tensions, institutional resilience, and democratic aspirations demand more than descriptive acknowledgment. They require strategic interventions that recognize both the structural constraints shaping genealogical practice and the transformative potential within existing communities of knowledge. The question is not whether reform is necessary, but instead how institutions, practitioners, and allied fields can navigate the complex terrain between preserving valuable traditions and embracing essential change.

The reform imperative emerges from multiple converging pressures: demographic shifts that threaten institutional sustainability, technological innovations that challenge traditional methodologies, and persistent barriers that contradict stated commitments to inclusive access. Yet the same data revealing these challenges also suggests pathways forward. The documented sophistication of uncredentialed practitioners, the successful adaptation strategies of proactive institutions, and the evolving relationships between academic and public history all point toward possibilities for meaningful transformation that honor genealogy's unique position at the intersection of personal meaning and scholarly rigor.

Three domains require coordinated reform efforts. First, lineage societies face existential choices about their future viability, with survival depending not on incremental adjustments to existing structures but on fundamental reimagination of participatory models that address the complex intersection of economic, geographic, and cultural barriers documented in this research. Organizations should develop new participatory spaces rather than competing within existing constraints, through innovations such as expanding virtual programming and educational or preservation partnerships that expand accessibility.

Second, genealogical practice and education must bridge the persistent gap between sophisticated amateur expertise and professional recognition, developing alternative credentialing pathways that acknowledge the interdisciplinary competencies practitioners bring while building capacity for methodological integration. The success of coding bootcamps and project management certificate programs suggests potential models for genealogical education that bridge the gap between academic credentials and practical expertise.

Third, the relationship between archives and genealogists requires continued evolution from historical antagonism toward collaborative models that recognize how each community's distinct epistemological framework can enhance rather than diminish scholarly standards. The

transformation documented in institutional relationships provides models for productive engagement between academic and public history.

### 10.17. Future Research Directions

The patterns documented throughout this analysis suggest several directions for future research that could address the methodological constraints identified above while extending scholarly understanding of genealogical practice and institutional transformation. Those directions cluster around three interconnected questions: whose genealogical experiences remain understudied, what historical foundations underpin the patterns this research has documented, and how methodological change within the field is reshaping both individual practice and organizational standards.

The most significant gap in the existing literature concerns genealogical communities that operate entirely outside the hereditary organization subculture. TallBear's work on Native American DNA and tribal belonging illuminates how genetic genealogy intersects with questions of tribal sovereignty that Euro-American lineage frameworks cannot adequately address, and the tensions she identifies between blood quantum requirements and genealogical documentation practices are only intensifying as DNA testing enters tribal enrollment determinations.<sup>856</sup> The African American genealogical community presents a distinct but related lacuna. Nelson's work on African American DNA testing and reparations movements provides a model for research examining how genealogical practice intersects with contemporary social justice movements, and the documented gap in this dissertation between diverse interest in genealogy, as evidenced by *Roots* viewership and post-broadcast library usage, and actual participation in formal hereditary organizations suggests that these alternative genealogical communities merit dedicated scholarly attention in their own right.<sup>857</sup> Jacobson's analysis of the white ethnic revival following *Roots* adds a further dimension, demonstrating that genealogical interest among European ethnic communities served specific identity functions in post-civil rights America; as American demographics continue to diversify, how those identity functions have evolved remains an open research question that neither Jacobson nor subsequent scholarship has fully addressed.<sup>858</sup> Taken together, TallBear, Nelson, and Jacobson collectively establish that the genealogical landscape is far more plural than any study focused on formal hereditary organizations can capture, and that the subcultures this dissertation has necessarily bracketed represent substantive research programs in their own right.

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<sup>856</sup> TallBear. *op. cit.* p##

<sup>857</sup> Nelson. *op. cit.* p##

<sup>858</sup> Jacobson. *op. cit.* pp. 2,4.

The historical foundations for these patterns run deeper than the 1970–2020 study period can reveal. Wulf's 2025 work, *Lineage: Genealogy and the Power of Connection in Early America*, reflects continuing scholarly interest in how genealogical practices shaped early American society, and her finding that exclusionary genealogical practices were embedded in American culture since colonial times, rather than created by hereditary societies, provides a crucial historical foundation for understanding the institutional patterns documented in this research.<sup>859</sup> Wulf's work reframes the organizations examined here not as originators of exclusionary logic but as later institutional expressions of tendencies already present in American genealogical culture, a reframing that should inform future comparative work across periods.

Methodological change within the field represents the third frontier. Genetic genealogy has moved from novelty to a standard research tool within the study period, and that integration is incomplete. Unlike the eugenic movements of the early twentieth century, contemporary genetic genealogy serves as a tool for resolving difficult genealogical problems that documentary evidence alone cannot resolve. The formalization of this shift, marked by the Board for Certification of Genealogists' 2014 acceptance of DNA evidence, has transformed how practitioners approach documentary gaps and confirm biological relationships, yet the professional-hobbyist divide in DNA acceptance documented in Chapter 6, Section 2.2 (59.6% versus 40.0% full support) confirms that methodological integration remains an ongoing process rather than a completed transformation. Future research should examine how hereditary organizations continue to integrate genetic evidence with traditional documentary verification, particularly as testing becomes more accessible and databases grow. This methodological question connects directly to a structural one: the gap between certification interest (49%) and certification achievement (5%), with economic barriers cited by 42.9% of participants, underscores the need for research focused on professional development barriers and alternative credentialing pathways. Longitudinal studies tracking the same participants over time could provide more robust evidence of these transformation patterns than the cross-sectional approach employed here allows and would permit the kind of causal analysis that this dissertation's design cannot support.

### 10.18. The Ongoing Transformation

The transformation of American genealogical practice from 1970 to 2020 extends beyond technological adoption or methodological evolution; it reflects fundamental negotiations over knowledge production, cultural authority, and democratic participation in historical inquiry. The

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<sup>859</sup> Wulf, Karin A. (2025) *Lineage: Genealogy and the Power of Connection in Early America*. Philadelphia: University of Pennsylvania Press.

patterns documented throughout this research, economic stratification alongside methodological sophistication, institutional adaptation alongside persistent discrimination, and technological innovation alongside traditional research, demonstrate that genealogical practice operates within what Hackstaff identifies as inevitable engagement with historical inequalities.

This research advances scholarly understanding of genealogical practice by documenting its transformation as a site of democratic historical engagement. By addressing genealogy's connection to a person's impulse to study history, particularly their history, this study provides empirical evidence of how millions of Americans negotiate historical investigation outside traditional academic frameworks. The comparative institutional analysis of NSDAR and GSMD contributes to organizational theory by demonstrating how lineage societies navigate technological and social change through contrasting adaptive strategies.

The distinction between reactive response and anticipatory management offers a framework applicable beyond genealogical organizations to any institution balancing historical preservation with contemporary relevance. This analysis particularly illuminates how institutional characteristics, resources, governance structures, and organizational culture influence adaptive capacity in ways that transcend simple policy changes.

Methodologically, this research demonstrates the value of applying genealogical principles to historical investigation itself. The triangulation approach, in line with the Genealogical Proof Standard's requirement for exhaustive research, revealed patterns that single-source analysis would have obscured. The successful integration of genetic genealogy within established documentary frameworks, as documented here, provides a model for how traditional fields can incorporate scientific innovation while maintaining disciplinary standards.

#### **10.19. Conclusion: The Paradox Persists**

This dissertation has examined how hereditary organizations navigated fifty years of technological, economic, and social transformation while maintaining their fundamental character as gatekeepers of validated American heritage. The evidence demonstrates that these organizations are neither unchangeable relics of nineteenth-century nativism nor fully transformed institutions that have transcended their exclusionary origins. They occupy a more complex position: organizations in ongoing negotiation with their own founding tensions, capable of significant adaptation while constrained by structural features inherent to bloodline-based membership.

Contemporary organizational efforts toward inclusion represent genuine institutional evolution. The NSDAR's publication of *Forgotten Patriots*, GSMD's Wampanoag Advisory Committee, and both organizations' integration of digital tools and genetic verification demonstrate meaningful adaptation to changing social expectations and technological possibilities. Interview participants consistently distinguished between historical practices and contemporary organizational culture, with TK's observation about "the old guard" versus "today's DAR" reflecting members' own perception of generational transformation. These efforts merit recognition as authentic attempts to address historical limitations.

At the same time, the persistence of structural tensions, particularly the gap between national policies and local practices documented throughout this research, indicates that transformation remains incomplete and warrants continued scholarly attention. The finding that member-level discrimination (14.0%) exceeds chapter-level discrimination (8.1%) suggests that formal policy changes have not fully transformed organizational culture at interpersonal levels. Whether contemporary inclusion efforts represent fundamental institutional transformation or surface-level accommodation to external pressure remains an empirical question that future research should address through longitudinal analysis of organizational practices and member experiences.

The paradox of democratic exclusion persists. Organizations deploy democratic rhetoric that honors all ancestors, welcomes all documented descendants, and celebrates American heritage while maintaining membership requirements that systematically advantage those with documentary privilege, economic resources, and social networks that facilitate successful applications. Contemporary efforts to address historical exclusionary practices represent genuine institutional evolution, yet the gap between national policies and local practices demonstrates that transformation remains incomplete.

What this research demonstrates is that understanding American genealogical culture requires attention to the bounded subcultures within it, the specific institutional forms, verification practices, and social dynamics that shape who can claim validated American heritage and how such claims are evaluated. The transformation of American lineage culture between 1970 and 2020 reflects broader American struggles with questions of belonging, exclusion, and the meaning of heritage in a diversifying society.

Strange's concept of the "will to descend" takes on new dimensions in this context, representing not merely individual desire for connection but participation in broader cultural processes of historical meaning-making.<sup>860</sup> The patterns documented here, the persistence of economic and

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<sup>860</sup> Strange (2014), *The Will to Descend*. *op. cit.* p. 108.

educational stratification alongside genuine methodological democratization, the maintenance of exclusive practices within formally inclusive institutions, and the embrace of technological innovation while preserving traditional methods, suggest that genealogical practice embodies rather than resolves fundamental tensions in American society.

These tensions between accessibility and excellence, tradition and innovation, individual discovery and collective memory, function not as problems requiring solutions but as productive forces that drive the field's continued evolution. This research indicates that genealogical practice will continue serving as a laboratory for exploring how societies produce knowledge, establish cultural authority, and enable democratic participation in an increasingly digital and diverse world.

The capacity of genealogical communities to foster sophisticated historical practice outside traditional academic structures, while simultaneously grappling with issues of inclusion, authenticity, and technological change, provides valuable lessons for other fields navigating similar challenges. The transformation documented from 1970 to 2020 thus represents not a completed journey but an ongoing process of negotiation and adaptation. As genealogical practice continues to evolve in response to technological advances, demographic change, and shifting social values, it will remain a vital site for understanding how societies create, validate, and transmit historical knowledge across generations.

This tension between documenting the past and serving the present, between preserving tradition and embracing change, ensures its continued relevance as both a popular pursuit and a subject worthy of serious scholarly attention. These struggles continue, and so does the transformation.

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Baltimore Sun	Bedford Sunday Herald-Times	The Berkshire Eagle	The Boston Daily Globe
The Boston Globe	Boston Evening Transcript	Boston Herald	Boston Traveler
Brooklyn Daily Eagle	Buffalo Morning Express	The Central New Jersey Home News	Chapel Hill Weekly
Chicago Post	Chicago Tribune	The Christian Science Monitor	Cincinnati Daily Gazette
The Cincinnati Post	The Circleville Herald	Clarion-Ledger	Cleveland Leader
Colorado Newline	The Columbian	The Columbus Ledger	Columbus Sunday Dispatch Magazine
Constitution	Cowboy State Daily	Daily Arkansas Gazette	<i>The Daily Journal</i>

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Daily Press	Dallas Morning News	Deseret News	Detroit Free Press
El Paso Herald	El Paso Times	Enquirer	Evansville Journal
Evansville Press	Evening Post	The Evening Star	Evening World
The Flint Journal	The Fort Wayne Journal-Gazette	Germantown Daily Chronicle	Grand Rapids Herald
Grant Tribune-Sentinel	The Guardian	Harrisburg Telegraph	Hartford Courant
Hartford Daily Courant	The Hawaiian Gazette	Herald	Hingham Patriot
The Honolulu Star-Bulletin	The Indianapolis News	Indianapolis Star	The Inter Ocean
International Herald	Jackson Citizen Patriot	The Jamestown Sun	Janesville Weekly Gazette
Ledger-Telegram	The Lincoln Star	The Los Angeles Times	Manufacturers and Farmers' Journal
Mashpee Wampanoag Tribe (website)	Morning Call	Morning Journal-Courier	The Naples Daily News
Natchez Democrat	Newark Daily Advertiser	New Orleans Bulletin	New York Evening Post
New York Mail	New York Tribune	The New York Times	The New York Times Book Review
<i>The New York Times Magazine</i>	The New Yorker	Newburyport Morning Herald	The News Journal
The Oil City Derrick	Omaha World-Herald	The Ottawa Journal	Pacific Commercial Advertiser
Phoenix Civilian	The Pittsburgh Daily Post	The Plymouth Evening Herald	Portsmouth Journal of Literature and Politics
Press-Register	Providence Evening Press	Providence Journal	Richardson Echo
Richmond Times-Dispatch	Rocky Mount Telegram	Sacramento Daily Union	Salt Lake Herald
San Antonio Light	The San Diego Union-Tribune	San Diego Union	The Shreveport Times
Smithsonian Magazine	Springfield Republican	Star-Gazette	The Star-Herald
The Stuart News	Sun and New York Press	The Sunday Star	TCA Regional News
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## **Appendices**

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## Appendix 1: Currently Active Hereditary and Lineage Organizations in the United States

This table lists 289 currently active organizations as cataloged by the Hereditary Society Community of the United States. Organizations are listed chronologically by founding date and categorized by historical era. This list is not exhaustive; new organizations are founded annually, and defunct organizations may not appear in current sources.

Source: Hereditary Society Community of the United States ([www.hereditary.us](http://www.hereditary.us)), compiled 2024. Before the community website was organized in 2002, directories of lineage organizations were published under the titles: *American Orders & Societies and Their Decorations*; *The Hereditary Register*; and *The Hereditary Society Blue Book*.

### Historical era key:

- Pre-Civil War (pre-1861)
- Gilded Age and Progressive Era (1861–1919)
- Interwar and World War II (1920–1945)
- Mid-Century (1946–1979)
- Contemporary (1980–2020)

Organization	Founded
Ancient and Honorable Artillery Company of Massachusetts	1637
Ancient Heraldic and Chivalric Order of Albion	1643
Scots Charitable Society	1657
National Order of the Knights of the Golden Horseshoe	1716
Saint Andrew's Society of Charleston	1729
Welsh Society of Philadelphia	1729
Saint Andrew's Society of Philadelphia	1747
Saint Andrew's Society of the State of New York	1756
Saint Andrew's Society of Washington, D.C.	1760
Saint George's Society of New York	1770
Society of the Friendly Sons of Saint Patrick of Philadelphia	1771
Society of the Sons of Saint George of Philadelphia	1772
Society of the Cincinnati	1783
Society of the Friendly Sons of Saint Patrick of the City of New York	1783
Veteran Corps of Artillery, State of New York	1790

Organization	Founded
New England Society in the City of New York	1805
Society of the War of 1812 in Maryland	1814
La Société Française de Beneficence	1816
Military Society of the War of 1812	1826
Saint David's Society of the State of New York	1835
Saint Nicholas Society of the City of New York	1835
Aztec Club of 1847	1847
The Society of California Pioneers	1850
General Society of the War of 1812	1854
Society of the Order of the Southern Cross	1863
Military Order of the Loyal Legion of the United States (MOLLUS)	1865
Society of the Army of the Tennessee	1865
Sovereign Colonial Society Americans of Royal Descent	1867
Morgan's Men Association	1868
Sons of the Revolution	1876
Sons of Union Veterans of the Civil War (SUVCW)	1881
Auxiliary to Sons of Union Veterans of the Civil War	1883
The Huguenot Society of America	1883
Sons and Daughters of Montana Pioneers	1884
Daughters of Union Veterans of the Civil War 1861–1865	1885
Ladies of the Grand Army of the Republic	1885
The Holland Society of New York	1885
Huguenot Society of South Carolina	1885
Sons of the American Revolution (SAR)	1889
Daughters of the American Revolution (DAR)	1890
Colonial Order of the Crown	1890
Colonial Dames of America	1890
Legion of Valor of the United States of America	1890
The National Society of the Colonial Dames of America	1891
Daughters of the Republic of Texas	1891
National Society United States Daughters of 1812	1892
Netherlands Society of Philadelphia	1892
Underhill Society	1892

<b>Organization</b>	<b>Founded</b>
Society of Colonial Wars	1893
Sons of the Republic of Texas	1893
Daughters of the Cincinnati	1894
Colonial Order of the Acorn	1894
United Daughters of the Confederacy (UDC)	1894
Military Order of Foreign Wars of the United States	1894
Royal Society of Saint George	1894
Children of the American Revolution (CAR)	1895
Colonial Society of Pennsylvania	1895
Pioneer Association of the State of Washington	1895
Society of Daughters of Holland Dames	1895
Order of Washington	1895
National Society of New England Women	1895
Order of the Founders and Patriots of America	1896
National Society Colonial Daughters of the Seventeenth Century	1896
Hereditary Order of Descendants of Colonial Governors	1896
Sons of Confederate Veterans (SCV)	1896
Children of the Confederacy	1896
Order of Indian Wars of the United States	1896
Society of Mayflower Descendants	1897
Minnesota Territorial Pioneers	1897
Pilgrim John Howland Society	1897
The Baronial Order of Magna Charta	1898
Order of the Crown in America	1898
Dames of the Loyal Legion of the United States	1899
Military Order of the Carabao	1900
International Society Daughters of Utah Pioneers	1901
Sons and Daughters of Oregon Pioneers	1901
Plantagenet Society	1902
Wing Family of America, Inc.	1902
Sons of Veterans Reserve	1903
Order of Americans of Armorial Ancestry	1903
Daughters of Hawaii	1903

<b>Organization</b>	<b>Founded</b>
Oklahoma 1889er Society	1905
Piscataqua Pioneers	1905
Stetson Kindred of America, Inc.	1905
Alden Kindred of America	1906
Welcome Society of Pennsylvania	1906
National Society Sons and Daughters of the Pilgrims	1908
Order of Descendants of Colonial Cavaliers	1908
National Society Americans of Royal Descent (NSARD)	1908
Willard Family Association of America, Inc.	1908
National Society Magna Charta Dames	1909
Society of the Descendants of the Alamo (original)	1909
National Society of Old Plymouth Colony Descendants	1910
Society of the Ark and Dove	1910
Order of Colonial Lords of Manors in America	1911
National Society Daughters of the Union 1861–1865	1912
First Families of Virginia	1912
Monticello Association	1913
Veterans of Foreign Wars Auxiliary	1914
Ladies Auxiliary Veterans of Foreign Wars	1914
United Empire Loyalists' Association of Canada	1914
National Society Colonial Dames XVII Century	1915
Society of Indiana Pioneers	1916
Louisiana Colonials	1917
Military Order of the World Wars	1919
National Society Daughters of the British Empire in the USA	1920
Society of the Descendants of the Schwenkfeldian Exiles	1920
Daughters of the Pioneers of Washington	1920
Society of Colonial Daughters	1920
National Society Daughters of the American Colonists	1921
National Society Daughters of the Barons of Runnemedede	1921
National Society of the Dames of the Court of Honor	1921
Huguenot Society of the Founders of Manakin in the Colony of Virginia	1922
Dutch Settlers Society of Albany	1924

Organization	Founded
Georgia Salzburger Society	1925
Sons of Spanish-American War Veterans	1927
Sons and Daughters of the First Settlers of Newbury Massachusetts	1927
National Society Women Descendants Ancient & Honorable Artillery Co.	1927
Women Descendants of the Ancient and Honorable Artillery Company	1927
North American Manx Association	1928
Society of Descendants of Knights of the Most Noble Order of the Garter	1929
American Patrons of St. George's and the Descendants of the Knights of the Garter	1931
Friends and Descendants of St. George's / Descendants of Knights of the Garter	1931
Society of the Descendants of the Founders of Hartford	1931
National Society Daughters of Colonial Wars	1932
Military Order of the Purple Heart	1932
Sons of the American Legion	1932
Somerset Chapter Magna Charta Barons	1932
Society of Descendants of the Colonial Clergy	1933
National Society Sons of Utah Pioneers	1933
Order of Daedalians	1934
Military Order of the Crusades	1934
Children of the Republic of Texas	1934
Jamestowne Society	1936
Order of Three Crusades 1096–1192	1936
National Society of the Lords of the Maryland Manors	1938
Military Order of the Stars and Bars	1938
Russian Nobility Association in America	1938
National Society Children of the American Colonists	1939
Order of the Crown of Charlemagne in the United States	1939
American Ex-Prisoners of War	1942
Governor William Bradford Compact	1946
Descendants of the Illegitimate Sons & Daughters of the Kings of Britain	1950
National Huguenot Society	1951
National Society of the Washington Family Descendants	1954
National Society of Sons of the American Colonists	1956

Organization	Founded
Order of Lafayette	1958
Flagon and Trencher (Descendants of Colonial Tavern Keepers)	1962
Dutch Colonial Society	1962
National Society Southern Dames of America	1962
Society of the Founders of the City of New Orleans	1963
First Families of Ohio	1964
San Jacinto Descendants	1965
Hood's Texas Brigade Association	1966
Order of the First Families of Mississippi 1699–1817	1967
Society of the Descendants of the Latin Kingdom of Jerusalem	1967
Soule Kindred of America	1967
Clan MacLean Association of the US	1968
Los Californianos	1969
Hereditary Order of Descendants of the Loyalists and Patriots of the American Revolution	1973
Order of Descendants of Colonial Physicians and Chirurgiens	1974
Thomas Rogers Society	1974
Descendants of Whaling Masters	1974
National Guild of Saint Margaret of Scotland	1975
Son of a Witch	1975
Descendants of Washington's Army at Valley Forge	1976
First Families of South Carolina	1976
Elder William Brewster Society	1978
Canary Islands Descendants Association	1979
National Society of the Descendants of Early Quakers	1980
Society of Descendants of the Conquest	1980
Society of Descendants of Ireland	1980
Society of Descendants of Scotland	1980
National Towne Family Association	1980
Veterans of the Battle of the Bulge	1981
Descendants of the Founders of New Jersey	1982
Prairie Pioneers	1982
Pilgrim Edward Doty Society	1982

Organization	Founded
Reverend Robert and Sarah (Winter) Jordan Foundation, Inc.	1982
Descendants of the Founders of Ancient Windsor	1983
Hereditary Order of the First Families of Massachusetts	1985
First Families of Georgia 1733–1797	1986
Associated Daughters of Early American Witches	1987
Descendants of Austin's Old Three Hundred	1987
First Families of the Twin Territories	1988
Continental Society Daughters of Indian Wars	1988
Order of Descendants of the Ancient & Honorable Artillery Company	1988
National Society Ladies of the Thistle	1988
Descendants of Mexican War Veterans	1989
Plymouth Hereditary Society	1990
Menorcan Cultural Society	1990
National Order of the Blue and Gray	1990
Order of Descendants of Ancient Planters	1991
Order of the First Families of Rhode Island and Providence Plantations	1991
Point Lookout Prisoner of War Organization	1991
Descendants of the Knights of the Bath	1991
Order of First Families of North Carolina	1992
Fuller Society	1992
First Families of Tennessee	1993
Order of the First World War	1993
La Société des Filles du roi et soldats du Carignan	1994
Sons and Daughters of the Colonial and Antebellum Bench and Bar 1565–1861	1994
Society of Descendants of the Founders of the New Haven Colony	1995
Delmarva First Families	1995
Order of the Second World War	1995
Presidential Families of America	1995
Noble Society of Celts	1996
Winthrop Society	1996
National Society Sons and Daughters of Antebellum Planters 1607–1861	1997
American Rosie the Riveter Association	1998

Organization	Founded
International Society of Sons and Daughters of Slave Ancestry	1998
Order of the First Families of Maryland	1999
Los Floridanos Society	2000
Descendants of Pirates and Privateers	2001
Order of the First Families of Maine	2003
Pilgrim Francis Cooke Society	2003
Hereditary Order of the Families of Presidents and First Ladies of America	2003
Guild of Colonial Artisans and Tradesmen 1607–1783	2004
Order of First Families of Connecticut 1633–1662	2004
Order of the Merovingian Dynasty	2004
Hereditary Order of the Signers of the Bush Declaration	2004
First Families of Kentucky	2005
Pilgrim Hopkins Heritage Society	2005
Registry of Infamous and Famous Relatives in American Families	2005
Noble Company of Saint Mary of Walsingham	2005
Children of the Doolittle Raiders	2006
First Families of Pennsylvania	2007
National Society of the Descendants of Textile Workers of America, Inc.	2007
One Hundred Living Descendants of Blood Royal	2007
American Descendants of the House of Burgesses 1619–1699	2009
Order of the First Families of New Hampshire 1622–1680	2009
First Settlers of the Shenandoah Valley	2009
Order of First Families of Vermont 1609–1791	2010
Descendants of Sheriffs and Constables of Colonial and Antebellum America	2010
Hereditary Society of Teachers	2010
Virginia Huguenot Society	2010
National Society of Saints and Sinners	2010
Sons and Daughters of World War II Veterans	2011
Order of Descendants of the Justiciars	2011
Society of the First Families of New York	2011
Order of the Founders of North America 1492–1692	2012
Sons and Daughters of Virginia Founding Fathers	2013

Organization	Founded
Order of the Norman Conquest	2013
Society of Descendants of Lady Godiva	2013
Pilgrim William White Society	2013
National Society Children of 1812	2014
Descendants of Fossors	2014
Order of Alba	2014
Pilgrim Peter Brown Society	2014
Descendants of Cape Cod and the Islands	2015
Military Order of Agincourt	2015
Order of American Cousins of the Present and Future Sovereigns of Great Britain	2015
The Shelby Society	2015
Order of the Vietnam War	2016
Descendants of the Green Mountain Boys	2016
Descendants of Early Postmasters 1607–1900	2016
Society of Myles Standish Descendants	2016
Founders Fellowship	2016
Descendants of Colonial Mothers 1607–1776	2017
Daughters of Confederate States of America Officer Corps	2017
Order of the First Families of the Alabama Territory	2017
Families of Antebellum Missouri	2017
Order of Medieval Women: Women of Consequence	2017
Order of the House of Wessex	2017
Order of Monarchs of Rheims / Order of Saint Denis	2017
Sons and Daughters of the United States Middle Passage	2017
The National Order of the Korean War	2018
Military Order of the Southern Cross in the Pacific Theatre	2018
National Society Descendants of Colonial Indentured Servants	2018
Order of the Kings and Queens in the Holy Lands	2018
Order of the Descendants of El Cid	2018
Legion of Vikings and Valkyries	2018
Descendants of Brian Boru	2018
Descendants of the First Families of Germantown	2018

<b>Organization</b>	<b>Founded</b>
Hereditary Order of the Red Dragon	2018
National Society Descendants of American Farmers	2019
Order of the Sovereigns of Ancient Scandinavia	2019
Order of the Steel Magnolias	2019
Order of the Descendants of Native Americans and Friends	2019
Descendants of Miners 1607–1907	2020

## Appendix 2: Genealogical Academic Institutions – Degrees and Certificates Offered

This sampling represents programs available through large academic institutions worldwide. Additional programs exist at smaller institutions, genealogical societies, and certification boards that are not listed here. All programs were offered as of August 2025 unless otherwise noted.

Institution	Location	Program Description	Cert.	Assoc.	Bach.	PG-Cert.	PG-Dip.	Mst.	PhD
<b>FRANCE</b>									
<b>École nationale des chartes – PSL</b>	Paris	60 credits, Diplôme Universitaire (DU) in Family History and Genealogy	✓						
<b>UNITED STATES</b>									
<b>Boston University</b>	Boston, MA	Genealogical Research Program, three graduate credit hours (last course spring 2026)	✓						
<b>Brigham Young University</b>	Provo, UT	60 credit hours, Associate of Applied Science in Family History Research		✓					
	Provo, UT	120 credit hours, Bachelor of Arts in Family History			✓				
	Rexburg, ID	60 credit hours, Associate of Applied Science in Family History Research		✓					
	Rexburg, ID	120 credit hours, Bachelor of Arts in Family History			✓				
<b>Ramapo College of New Jersey</b>	Mahwah, NJ	Investigative Genetic Genealogy Certificate	✓						
<b>University of New Haven</b>	West Haven, CT	Forensic Investigative Genetic Genealogy	✓						


Institution	Location	Program Description	Cert.	Assoc.	Bach.	PG-Cert.	PG-Dip.	Mst.	PhD
		(FIGG) Graduate Certificate, 12 credit hours							
<b>William Paterson University</b>	Wayne, NJ	12 credit hours, Genealogy and Family History, Undergraduate Certificate	✓						
<b>AUSTRALIA</b>									
<b>University of New England</b>	Armidale, NSW	72 credit hours, Advanced Diploma in Local, Family, and Applied History					✓		
<b>University of Tasmania</b>	Dynnyrne, TAS	8 courses, Diploma of Family History	✓						
<b>IRELAND</b>									
<b>University of Limerick</b>	Limerick	30 credits, History of Family and Genealogical Methods – Certificate	✓						
	Limerick	60 credits, Master of Arts in History of Family						✓	
<b>University College Cork</b>	Cork	Four courses, Certificate in Genealogy	✓						
	Cork	Four courses and a dissertation, Diploma in Genealogy					✓		
<b>SCOTLAND</b>									
<i>University of Dundee</i>	Dundee	<i>Discontinued 2021. Previously offered: PG-Certificate, PG-Diploma, and Master of Letters (MLitt) in Local and Family History</i>				✓	✓	✓	
<b>University of Strathclyde</b>	Glasgow	History with Genealogical Studies			✓				

Appendices

Institution	Location	Program Description	Cert.	Assoc.	Bach.	PG-Cert.	PG-Dip.	Mst.	PhD
		(undergraduate pathway)							
	Glasgow	PG-Certificate in Genealogical, Heraldic, and Paleographic Studies, 30 credit hours				✓			
	Glasgow	PG-Diploma in Genealogical, Heraldic, and Paleographic Studies, 60 credit hours plus thesis					✓		
	Glasgow	Master of Science in Genealogical, Heraldic, and Paleographic Studies, 120 credit hours plus dissertation						✓	
<p><b>Abbreviations:</b> Cert. = Undergraduate Certificate; Assoc. = Associate Degree; Bach. = Bachelor's Degree; PG-Cert. = Postgraduate Certificate; PG-Dip. = Postgraduate Diploma; Mst. = Master's Degree; PhD = Doctorate. ✓ = program offered as of August 2025.</p>									

Sources: Individual institutional websites. Compilation current as of August 2025.

## Appendix 3: Participant Information Sheet and Explanation of Project



Director: Professor Arthur McIvor,  
Faculty of Humanities & Social Sciences,  
University of Strathclyde.

**Participant Information Sheet (Prior Consent for Interview)**

**Project Title: The Evolution of Hereditary Organizations and Lineage Societies in the United States: Why They Formed, How They Are Perceived, And Their Contributions to Historical And Genealogical Research.**

**Shannon Combs-Bennett, Ph.D. student in History, Faculty of Humanities & Social Sciences, University of Strathclyde, Glasgow, UK.**

*You are being invited to participate in a small research project titled The Evolution of Hereditary Organizations and Lineage Societies in the United States: Why They Formed, How They Are Perceived, And Their Contributions to Historical and Genealogical Research. Please read and consider the following information about the study and do not hesitate to ask us questions if anything is not clear (our full contact details can be found on p. 3).*

**What is the purpose of this study?**


This study concerns the perceptions of heritage organizations and lineage societies and the reliability of the genealogy research for those groups. The study aims to inform a Ph.D. project on insight into perceptions of these organizations, if they contribute to historical preservation or knowledge, and the reliability of genealogical research used for membership. As part of this research, we are conducting oral history interviews with people involved with these organizations and persons who are not.

**What does taking part in the study involve?**

If you agree to participate in the study, an oral history interview with us would involve spending as little or as much time as you are comfortable talking about your thoughts and opinions. The interview will be conducted by Shannon Combs-Bennett, the Ph.D. student carrying out this research. Due to the current COVID-19 pandemic and geographic distances of potential participants, the interview will be conducted remotely via the telephone or online using Zoom video software (or another video application if preferred). However, once it is safe and allowed by the University of Strathclyde, in-person interviews will also become an option for those who wish it. Before the interview, if you choose, Combs-Bennett will conduct a pre-interview conversation with you, to ensure you are comfortable with the method of communication. You do not have to answer any questions you do not wish to, and you may stop the interview at any time. You can also change your mind and decide not to participate at any time, if you wish, without giving a reason. No payments or other tangible incentives will be offered for participation. However, in return for your time, you will be offered the opportunity to contribute to existing knowledge by voicing your previously unrecorded experiences and having these recordings archived for future use according to your wishes as expressed on the recording agreement form.

**Who is organising and funding the research?**

The research is supervised by Dr. Mark Ellis, Senior Lecturer and Head of the Graduate School of the Faculty of Humanities and Social Sciences (HaSS) at the University of Strathclyde and Tahita McCabe, Knowledge Exchange Fellow, Centre for Lifelong Learning, School of the Faculty of Humanities and Social Sciences (HaSS) at the University of Strathclyde. The research is part of a Ph.D. in History with no outside funding.



**Explanation of Project**

**Title of Project: The Evolution of Hereditary Organizations and Lineage Societies in the United States: Why They Formed, How They Are Perceived, And Their Contributions to Historical And Genealogical Research.**

**Dear Survey Participant,**

Thank you for taking the time to answer the survey questions on my study topic. You indicated at the end of the survey that you would be willing to participate in either individual or group interviews (10-15 people) on topics concerning this study. I truly appreciate the time you took to help my research.

I am required to give you the following information from the University of Strathclyde. To interview you, I need the "Informed Consent Return Slip" filled out and signed. It states that you have read your rights as a participant in this study and are willing to participate in the interview (oral history) part of the study. I cannot interview you without this consent.

All interviews will occur at GMT-5 (East Coast United States). Several participants have indicated they are located outside of the United States. I will work with you to find a time that will accommodate our time differences.

As a reminder, I cannot see how you answered the survey as it was anonymous and not linked to your personal information. This means I need your input on which subjects you are willing to discuss. To do this, please include the "Interview Topics" form indicating your preferences on the subjects you are willing to discuss with me.

Once again, thank you for taking the time to help with my research topic. I look forward to speaking with you in the future.

Shannon Combs-Bennett  
Ph.D. Student  
Faculty of Humanities and Social Sciences  
University of Strathclyde

**Do you have to take part?**

Participation in this project is entirely voluntary. If you agree to participate, you will be asked to sign a consent form. Please note that you will still be free to withdraw at any time, and we will not ask you to give any reasons if you choose to do so. However, we believe that your perspective would add important context and information to our study and would be a valuable resource for the present research and for any future researchers seeking to study the influence and historical significance of heritage organizations and lineage societies within the United States.

**Are there potential risks to taking part?**

We hope that the experience of taking part will be enjoyable. No intentionally intrusive questions will be asked. However, should you experience any discomfort, the interview can be concluded. At any point in the process (even following the interview and the interview transcription), you are welcome to withdraw your data from the study if you are uncomfortable with it being included.

**What will happen to your interview?**

Your interview will be recorded then written down (transcribed) exactly as spoken on paper, or a time-coded summary will be prepared. You have the right to put your name to your interview recording and transcript or, if you prefer, to be anonymous (in which case your name will never be used in any publication). To use your material in any publications, we must ask you to sign a Recording Agreement Form. If you wish, your memories can also be used by subsequent historians and researchers who might wish to consult the archived interviews (subject to your further agreement via the Recording Agreement Form completed after the interview). The University will be processing the personal data within your interview, and transcripts/summaries thereof as part of the performance of a task carried out in the public interest under the General Data Protection Regulation (GDPR May 2018). The University's public task is set out in the University's Charter. Where more sensitive or "special category" data is contained within your interview and transcript thereof, it is processed because it is necessary for archiving purposes in the public interest and historical research purposes. Please also read our Data Protection Privacy Notice (overleaf).

We ask that you consider these issues, and if you agree to be interviewed and for your memories to be so used, we ask you to complete a Recording Agreement Form before the interview takes place. This protects your legal rights, ensures that your interview recording and transcript are correctly and professionally archived and looked after, and enables us as researchers (and subsequent researchers if you wish) to utilise your memories in any future research. A copy of your interview will also be sent to you (securely under arrangements agreed with yourself) for listening to and checking, allowing you to indicate if you wish anything to be taken out or changed. This procedure is in line with your legal rights, and we operate strictly to the moral, ethical, and legal requirements laid down by the UK Oral History Society.

This investigation was granted ethical approval by the University of Strathclyde Ethics Committee (History/Humanities).

**Thank you for reading this information.**

If you have any specific questions about what is written here, the research, what taking part in an oral history interview involves, or what happens after the interview, please contact my supervisor or me.

**My Contact Details:**

Shannon Combs-Bennett  
Ph.D. Student  
Faculty of Humanities and Social Sciences  
University of Strathclyde

**Primary Supervisor Details:**

Dr. Mark Ellis  
Sr. Lecturer, History  
Faculty of Humanities and Social Sciences  
University of Strathclyde

**Secondary Supervisor Details:**

Tahlia McCabe  
Knowledge Exchange Fellow  
Centre for Lifelong Learning  
Faculty of Humanities and Social Sciences  
University of Strathclyde

If you have any questions/concerns, during or after the investigation, or wish to contact an independent person to whom any questions may be directed, or further information may be sought, please contact:

Secretary to the University Ethics Committee  
Research & Knowledge Exchange Services  
University of Strathclyde



**Interview Topic Preferences**

**Title of Project: The Evolution of Hereditary Organizations and Lineage Societies in the United States: Why They Formed, How They Are Perceived, And Their Contributions to Historical And Genealogical Research.**

- I want to be interviewed (choose one or both):
  - By myself
  - As part of a panel (5-10 people)
- I would like to be Anonymous
  - Use the Pseudonym shown below
  - Assign me a Pseudonym for the project
- I am willing to discuss the following topics:
  - Aspects of the study as a non-genealogist
  - Aspects of the study as a professional
  - Aspects of the study as a member of a lineage society
  - Aspects of the study as a person who has worked on society applications

I want to discuss these additional topics about heritage organizations and lineage societies:

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Printed Name (or pseudonym):	
Signature of Participant:	Date:

**University of Strathclyde Archives (Oral Interviews) Data Protection Privacy Notice**

The University of Strathclyde is a data controller under data protection legislation. We are committed to transparency and to complying with our responsibilities under data protection legislation. This privacy notice sets out important information regarding how we will use your information and your rights under the legislation. It is important that you read this notice prior to providing your information. Any enquiries regarding data protection should be made to the Data Protection Officer at [data.protection@strath.ac.uk](mailto:data.protection@strath.ac.uk).

**How we use your personal data**

We will use your information only for the purposes set out above, i.e. to archive your oral history recording and make it publicly accessible to researchers according to your wishes. It may be retained in perpetuity in the University Archives.

**Legal basis for processing**

Under data protection legislation we are required to identify our legal basis for processing. In this situation your data will be processed for the following stated purposes:

The University will be processing the personal data within your interview and transcripts thereof as part of the performance of a task carried out in the public interest in accordance with the General Data Protection Regulation (GDPR May 2018). Where more sensitive or "special category" data is contained within your interview and transcript thereof it is processed because it is necessary for archiving purposes in the public interest, and for historical research purposes.

**Retention Period**

The oral history recording, summary and/or transcription may be retained in perpetuity in the University Archives.

**Your rights in relation to personal data**

Data Protection legislation sets out a number of rights for individuals in relation to how their personal data is processed, but these do not apply in all circumstances, and will depend on the legal basis for processing. In this case, the following rights may not apply where we have adequate safeguards in place to protect your data, or where the application of such rights would prevent or severely impair the achievement of the purpose of archiving in the public interest or historical research.

- In some circumstances you may be able to:
  - access your personal data held by the University.
  - ask for personal data to be rectified if it is inaccurate or incomplete.
  - ask us to restrict the use of your data (for example, if you have raised concerns about the accuracy or use of your personal data) until we have investigated and responded to you.
  - object to the processing of your personal data.
  - ask us to erase your personal data.

To exercise these rights, or if you have any concerns/issues with the way the University has processed your personal data you can contact the Data Protection Officer at [data.protection@strath.ac.uk](mailto:data.protection@strath.ac.uk).

You also have the right to lodge a complaint against the University regarding data protection issues with the Information Commissioner's Office (<https://ico.org.uk/concerns/>).

**Informed Consent Return Slip**



**The Evolution of Hereditary Organizations and Lineage Societies in the United States: Why They Formed, How They Are Perceived, And Their Contributions to Historical And Genealogical Research.**

**PLEASE SIGN AND RETURN THIS SLIP TO:**

Shannon Combs-Bennett  
shannon.combs-bennett@strath.ac.uk

- I confirm that I have read and understood the information sheet for the above project, and the researcher has answered any queries to my satisfaction.
- I understand that if I wish to be anonymous, any information recorded in the investigation will remain confidential, and no information that identifies me will be made publicly available.
- I consent to be interviewed for the purpose of the above project and for my interview to be recorded

I, _____ (PRINT NAME / PSEUDONYM)	Date:
hereby agree to take part in the above project	
Signature of Participant:	

## Appendix 4: Ethics Approval Letter



28 July 2021,

Dear Dr. Ellis and Ms. Combs-Bennett,

The Ethics Committee of the School of Humanities at the University of Strathclyde has reviewed and approved your proposed research project.

Sincerely,

Matthew N. Eisler

A handwritten signature in black ink, appearing to read "Matthew N. Eisler".

Convener, School Ethics Committee  
Faculty of Humanities and Social Sciences  
University of Strathclyde  
Glasgow G1 1XQ

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## Appendix 5: Codes and Subcodes

The table below lists all codes and subcodes used during the qualitative analysis of survey open-response data and interview transcripts. Data were drawn from four sources: genealogical materials, organizational records, academic studies, and interview transcripts. Codes were applied across all four source types unless otherwise indicated in the analysis chapters. The column *n* indicates the number of sub-codes within each category.

Code / Theme	n	Sub-codes
<b>Adoptions</b>	2	DNA · Lineage Research
<b>Adaptation of Lineage Societies</b>	20	Community Involvement · Criticism Response · Diversity Promotion · DNA Incorporation · DNA Testing Integration · Generational Engagement · Involving Children · Membership Concerns · Evolution · Inclusivity Emphasis · Public Engagement · Engagement Strategies · Personalized Services · Relevance · Inclusivity · Relevance Adaptation · Mission Adaptation · Public Engagement Strategies · Relevance Promotion · Transparency
<b>Applications</b>	3	Genealogy Research Standards · Fraudulent Genealogy · Education of Preparers
<b>Certification</b>	3	History of · Reasons for · Types of
<b>Conferences</b>	2	Academic · Hobbyist
<b>Cultural Impact</b>	46	Adaptability · Adaptation to Identity · Ancestral Exploration · Ancestry Exploration · Ancestry Interest · Challenging Lineage Purity · Classism · Cultural Challenges · Cultural Diversity · Cultural Heritage · Cultural Identity · Cultural Influence · Cultural Movements · Cultural Values · Diverse Histories · Ethnic Communities · Ethnicity · Exclusionary Creation · Family Heritage Preservation · Genealogical Research · Heritage Curiosity · Heritage Perspectives · Historical Context · Historical Events · Historical Exclusion · Historical Narratives · Identity Motivations · Identity Preservation · Inclusivity Perception · Institutional Collaboration · Institutional Responses · Lack of Representation · Lineage Societies · Marginalization · Minority Representation · Public Pressures · Racial Discrimination · Regional Identity · Reliable Sources · Resistance to Change · Restoring Records · Shared Cultural Heritage · Slavery Impact · Stereotype Perception · Traditional Practices · Virtual Interactions
<b>Disciplines</b>	16	Archives · Archivist · Community · Cooperation · Define Discipline · Digital Humanities · Framework of · Historian · Historiography · History (various) · List of · Microhistory · Outreach · Perceptions · Psychology · Stereotypes of

Code / Theme	n	Sub-codes
<b>DNA / Genetics</b>	29	Academic Pursuits · Access Restrictions · Adapted Standards · Ancestral Proof · Certification Courses · Community Changes · Companies · Consequences · Disproven Facts · DNA Analysis · DNA Applications · DNA Course · Evolving Field · Genealogical Community · Genealogical Research · Genetic Adoption · Genetic Genealogy · Lack of Accessibility · Lack of Knowledge · Lineage Discovery · Lineage Societies · Methodologies · Perceptions · Popularity · Privacy Laws · Professional Standards · Reasons for Testing · Slow Adoption · Standards
<b>Economic Factors</b>	17	Academic Pursuits · Access to Education · Access to Resources · Age Distribution · Ancestry Exploration · Application Assistance · Economic Accessibility · Economic Barriers · Economic Mobility · Financial Constraints · Genealogical Research · Genetic Testing Costs · Interest in Membership · Lineage Society Membership · Opportunities · Professional Pursuit · Skill Development
<b>Education</b>	9	Academic · American Society of Genealogists · Degrees · Institutes · Perceptions of · Public School · Standards · Teaching of · Types of
<b>Event</b>	4	US Bicentennial · US Centennial · Roots · Year 2000
<b>Genealogist–Lineage Society Relationship</b>	13	Accuracy · Collaboration · Critical Discussions · Diverse Perspectives · DNA · Evolution of Relationship · Increased Participation · Knowledge Exchange · Personal Interest · Relationship Shift · Research Methods · Specialization · Trained Registrars
<b>Media Influence</b>	26	Academic Focus · Access Restrictions · Accurate Historical Storytelling · Ancestral History · Audience Appeal · Compelling Narrative · Democratization · Educational Programs · Entertainment · Exposure to Genealogy Events · Family History Sharing · Global Reach · Historical Lineages · Information Exploration · Interest Boost · Media Trends · Modern Media · Perception Shaping · Popular Entertainment · Popular Interest · Popularity of Genealogy Shows · Public Awareness · Reliability · Social Media · Societal Perspectives · Storytelling
<b>Multicultural Influence</b>	8	Ancestral Preferences · Changing Demographics · Demographics · Diverse Backgrounds · Diversity · Historical Engagement · Inclusivity · Multiculturalism
<b>Organizations</b>	9	Collaborations · Discrimination · Ethnicity · Founding of · Membership · Mormon · National Genealogical Society · Nationalism · Perceptions of
<b>Perceptions</b>	5	By Academics · By Professionals · Of Ethnicity · Of Hobbyists · Stereotypes of

Code / Theme	n	Sub-codes
<b>Popularity</b>	10	As Hobby · Democratization · Diversification · Generational Engagement · Growing Popularity · Inclusivity · Membership Diversity · Organizational Changes · Shifting Demographics · Social Influence
<b>Professional</b>	6	Accredited Genealogists · Board of Certification of Genealogists · Fraudulent Work · Perceptions of · Popularity · Researchers
<b>Publications</b>	6	Books · Genealogies · Internet · Journals · Repository-Based · Scholarship
<b>Records</b>	8	Accessibility · Availability · Democratization · Difficulties · Privacy · Repositories · Sources · Types of
<b>Repositories</b>	3	Types of · Records in · Users of
<b>Research/Researcher</b>	15	Academic · Amateur · Archives · Black Sheep · Colonial · Community · Data · Elitism · Errors · Ethnic · Gender · Methodology · Perceptions of · Skills · Volunteers
<b>Social Class</b>	4	Elitism · Ethnicity-Based · Historical · Monetary-Based
<b>Social Influence</b>	57	Access to Archives · Accuracy Improvement · Adoption Impact · Ageism · Ancestor Connection · Antiquated Views · Archival Access · At-Home Genealogy · Certification Courses · Change in Institutions · Changing Attitudes · Changing Perspectives · Community Changes · Community Service · Connection to Family History · Connection to Heritage · Connection to History · Data Trends · Demand for Professionals · Demographic Shifts · Diversity Acceptance · Education Impact · Enslaved Descendants · Evolving Lineage Societies · Family Engagement · Family History · Future Generations · Genealogical Research · Generational Shift · Global Reach · Historical Accuracy · Hobbies · Identity · Immigrant Background · Indigenous Communities · Interest in Genealogy · Lack of Accessibility · Lineage Research · Local Genealogy Society · Minority Engagement · Modernization · New Perspectives · Oral Tradition · Perceptions of Elitism · Preservation of History · Preservation of Records · Professional Genealogy · Reverse Ageism · Service Organization · Standardization of Proof · Stereotypes · Technology · Verification Processes · Volunteering · Young Genealogists · Younger Women · Youth Engagement
<b>Technological Transformations</b>	16	Accessibility · Accuracy · Ancestry Tracing · Companies · Crowdsourcing · Democratization · Digitization · Education · Efficiency · Ethics · Gateway to Research · Impact on Genealogy Societies · Internet · Precision · Research Tools · Software
<b>25 codes</b>	<b>337</b>	Total sub-codes across all categories

## Appendix 6: Survey Questions, Response Options, and Counts

Each of the groups will have a set of questions pertaining to them to gather information on their impressions of heritage organizations and lineage societies. Participants can choose as many groups as possible that describe them.

Questions which have a double asterisk (\*\*) next to them are similar to the 2001 Fullerton Genealogy Study by Pamela J. Drake. While that study was a psychology project, several of the demographic and education questions were general enough to be used here. The purpose of these questions is to determine how the genealogy community has changed in the last 20 years.

**Who is organizing and funding the research?**  
The research is supervised by Dr. Mark Ellis, Senior Lecturer and Head of the Graduate School of the Faculty of Humanities and Social Sciences (HaSS) at the University of Strathclyde and Tahitia McCabe, Knowledge Exchange Fellow, Centre for Lifelong Learning, School of the Faculty of Humanities and Social Sciences (HaSS) at the University of Strathclyde. The research is part of a Ph.D. in History with no outside funding.

**Researcher Contact Information:**  
If you need more information or have any questions, please contact me or my supervisors using the following contact information.


**My Contact Details:**  
Shannon Combs-Bennett  
Ph.D. Student  
Faculty of Humanities and Social Sciences  
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**Secondary Supervisor Details:**  
Tahitia McCabe  
Knowledge Exchange Fellow  
Centre for Lifelong Learning  
Faculty of Humanities and Social Sciences  
University of Strathclyde

**Primary Supervisor Details:**  
Dr. Mark Ellis  
Sr. Lecturer, History  
Faculty of Humanities and Social Sciences  
University of Strathclyde

If you have any questions/concerns, during or after the investigation, or wish to contact an independent person to whom any questions may be directed, or further information may be sought, please contact

**Secretary to the University Ethics Committee**  
Research & Knowledge Exchange Services  
University of Strathclyde



**Project Title:**  
The Evolution of Hereditary Organizations and Lineage Societies in the United States: Why They Formed, How They Are Perceived, and Their Contributions to Historical and Genealogical Research.

**What is the purpose of this study?**  
This study concerns the perceptions of heritage organizations and lineage societies and the reliability of the genealogy research for those groups. As part of this research, I am conducting oral history interviews with people involved with these organizations and persons who are not. The study aims to inform a Ph.D. project on insight into perceptions of these organizations, if they contribute to historical preservation or knowledge, and the reliability of genealogical research used for membership.

For the purposes of this study, a heritage organization or lineage society is defined as

*An organization whose members are descended from a person, or group of people, whose family histories share common features and whose membership is based on proving their descent from an ancestor through genealogical research and documentation*

**Directions for taking the survey:**  
Participation in this project is entirely voluntary. However, I believe that perspectives from a wide audience would add important context and information to our study and would be a valuable resource for the present research and for any future researchers seeking to study the influence and historical significance of heritage organizations and lineage societies within the United States.

The survey will use the university licensed software Qualtrics. This program is designed to build surveys, distribute them online, and allow analysis of the information through the program. Answers are completely anonymous. The link to participate in the survey is here: [https://haass.eu.qualtrics.com/jfe/form/SV\\_cUS9V6qbpq9s0OK](https://haass.eu.qualtrics.com/jfe/form/SV_cUS9V6qbpq9s0OK)

Participants must be over the age of 18. Participants are assigned a number by the survey program, and they will be referred to by that number in the research. At the end of the survey participants will have the opportunity to give contact information if they would like to participate in the interview section of the study. This is optional, and not required to complete the survey.

For analysis purposes, the survey is broken into several sections. Everyone will take the sections covering general demographics, education, involvement in genealogy, impressions of applications for these organizations, uses of DNA with genealogy, and discrimination. After these sections the participant will select from a group of descriptions that they feel best describes them.

These groups are:

- Historian, archivist, librarian, professional genealogist, or employed with a company which does genealogical work and interacts frequently with persons who perform genealogical research
- Member of a lineage or heritage organization
- Not a member of a lineage or heritage organization
- A paid staff member or volunteer for a heritage organization or lineage society who approves applications for membership or assists prospective members with their applications
- A genealogist/family history researcher (but not a professional) who researches for themselves, family, friends, or others for free

## Appendices

The following table presents all 92 questions from the Qualtrics survey instrument administered as part of the primary research for this thesis (N = 1,164 respondents). Questions are organized into eight thematic sections. Conditional questions — those asked only of respondents routed by a prior answer — are indicated in amber italic with the applicable sub-group size. Response options shown as *See raw data and analysis chapters* indicate numeric or open-text responses analyzed in Chapters 5, 6, and 7. Open-text and qualitative responses are quoted directly in the analysis chapters rather than tabulated here. *Survey administered via Qualtrics. See Chapter 4 for full methodology, sampling strategy, ethical approvals, and recruitment procedures.*

### Key

**Section headers (navy):** Thematic groupings dividing the instrument into eight sections and sub-sections.

**Question rows (light navy tint):** Individual survey questions, shown in bold with the Q-number in navy.

**Response rows (alternating light purple / white):** Individual response options, indented under their parent question.

**Conditional questions (amber italic note):** *Asked only of respondents routed by a prior answer. The amber italic note identifies the applicable sub-group and its size.*

**n column:** Response count. Entries marked *See raw data and analysis chapters* indicate sliding-scale numeric or open-text responses analyzed in Chapters 5, 6, and 7 rather than tabulated here. N = 1,164 total respondents.

SECTION 1: RESPONDENT DEMOGRAPHICS		
<b>Q1</b>	<b>In what year were you born?</b> <i>Used to compare generational responses across all questions.</i>	<i>n</i>
	<i>Four-digit year response: See raw data and analysis chapters</i>	
<b>Q2</b>	<b>Gender identification</b>	<i>n</i>
Q2a	Female	1006
Q2b	Male	147
Q2c	Non-binary / other	8
Q2d	Prefer not to say	3
Q2e	No response	0
<b>Q3</b>	<b>Marital status: Which of the following best describes you?</b>	<i>n</i>
Q3a	Single / Never Married	143
Q3b	Married / Long-Term Partner	715
Q3c	Separated	10
Q3d	Divorced — Not Remarried	107
Q3e	Remarried More Than Once	38
Q3f	Widowed	59
Q3g	Remarried Once	90
Q3h	No response	2
<b>Q4</b>	<b>Select the ethnicity which best defines you.</b> <i>Categories based on United States National Institutes of Health guidelines (NIH Notice OD-15-089).</i>	<i>n</i>

Appendices

Q4a	American Indian or Alaska Native	4
Q4b	Asian	1
Q4c	Black or African American	9
Q4d	Hispanic or Latino	10
Q4e	Mixed Race	22
Q4f	Native Hawaiian	1
Q4g	Other Pacific Islander	1
Q4h	Caucasian (non-Hispanic)	1104
Q4i	Would prefer not to say	12
Q4j	No response	0
<b>Q5</b>	<b>What was your total household income last year? (Estimated in U.S. dollars)</b>	<i>n</i>
Q5a	No income	2
Q5b	Less than \$20,000	27
Q5c	\$20,000–\$40,000	83
Q5d	\$40,000–\$60,000	119
Q5e	\$60,000–\$80,000	142
Q5f	\$80,000–\$100,000	156
Q5g	\$100,000 or more	418
Q5h	Would prefer not to say	217
Q5i	No response	0
<b>Q6</b>	<b>How many people lived in your home last year?</b>	<i>n</i>
Q6a	<i>Adults (18 and over) — numeric answer: See raw data and analysis chapters</i>	
Q6b	<i>Children (under 18) — numeric answer: See raw data and analysis chapters</i>	
<b>Q7</b>	<b>I currently live in:</b>	<i>n</i>
Q7a	An urban area (a city or a greater metropolitan area)	297
Q7b	A suburban area (a town or small city surrounding an urban area)	459
Q7c	A small town (a town separate from an urban or suburban area)	237
Q7d	A rural area (living outside of a town in the countryside)	163
Q7e	Would prefer not to say	8
Q7f	No response	0
<b>Q8</b>	<b>Where is your current geographic location?</b>	<i>n</i>
Q8a	<i>Country: See raw data and analysis chapters</i>	
Q8b	<i>State, province, or county: See raw data and analysis chapters</i>	
Q8c	Would prefer not to say	29
<b>Q9</b>	<b>What is the highest level of education you have completed?</b>	<i>n</i>
Q9a	High School / General Education Diploma (GED)	29
Q9b	Associate Degree	42
Q9c	Trade School / Certificate Program	21

Q9d	Some College	146
Q9e	Bachelor Degree	407
Q9f	Master Degree	426
Q9g	Doctoral Degree	85
Q9h	No response	8
<b>SECTION 2: GENEALOGY ACTIVITY AND PERCEPTIONS</b>		
<b>Q10</b>	<b>Have you conducted family history or genealogical research?</b>	<i>n</i>
Q10a	Yes	1078
Q10b	No	80
Q10c	No response	6
<b>Q11</b>	<b>Do you feel that family history or genealogical researchers are typically what age?</b>	<i>n</i>
Q11a	Under 20 years old	0
Q11b	20–40 years old	23
Q11c	40–60 years old	564
Q11d	Over 60 years old	364
Q11e	No opinion	207
Q11f	No response	6
<b>Q12</b>	<b>Do you feel family history or genealogical researchers are typically what employment status?</b>	<i>n</i>
Q12a	Homemakers	8
Q12b	Employed in another field, genealogy is their hobby	690
Q12c	Employed in genealogy or related field	19
Q12d	Retired	243
Q12e	No opinion	196
Q12f	No response	8
<b>Q13</b>	<b>Do you feel family history or genealogical researchers are typically what gender?</b>	<i>n</i>
Q13a	Men	24
Q13b	Women	520
Q13c	Non-binary	6
Q13d	No opinion	145
Q13e	Equal number of all	461
Q13f	No response	8
<b>Q14</b>	<b>Do you feel family history or genealogical researchers are typically what socioeconomic class?</b>	<i>n</i>
Q14a	Poor	1
Q14b	On a fixed income	12
Q14c	Middle class	789
Q14d	Wealthy	53

Q14e	No opinion	303
Q14f	No response	6
<b>Q15</b>	<b>Do you feel family history or genealogical researchers are typically what political leaning?</b>	<i>n</i>
Q15a	Politically conservative	160
Q15b	Politically moderate	164
Q15c	Politically liberal	31
Q15d	No opinion	801
Q15e	No response	8
<b>Q16</b>	<b>Do you feel genealogy or family history is a sub-set of history or a stand-alone subject?</b>	<i>n</i>
Q16a	Sub-set of history	722
Q16b	Stand alone	390
Q16c	No opinion	45
Q16d	No response	7
<b>Q17</b>	<b>Why do you feel genealogy is a sub-set of history? Check all that apply.</b> <i>Asked of the 722 respondents who answered "sub-set of history" in Q16.</i>	<i>n</i>
Q17a	Genealogy shares methodology with history	411
Q17b	Understanding history is important for genealogy	626
Q17c	They use the same types of records for research	455
Q17d	They both study kinship	228
Q17e	They both study the past	528
Q17f	<i>Other (open text): See raw data and analysis chapters</i>	
Q17g	No response	0
<b>Q18</b>	<b>Why do you feel genealogy is a stand-alone subject? Check all that apply.</b> <i>Asked of the 390 respondents who answered "stand alone" in Q16.</i>	<i>n</i>
Q18a	It used to be a subset of history, but the field has matured into its own field	96
Q18b	Genealogy is related to a large number of fields, not only history	282
Q18c	Genealogy has its own methodology	227
Q18d	Genealogy has its own literature (books, magazines)	162
Q18e	It has an academic presence	78
Q18f	<i>Other (open text): See raw data and analysis chapters</i>	
Q18g	No response	2
<b>Q19</b>	<b>Do you use the terms family history and genealogy interchangeably?</b>	<i>n</i>
Q19a	Yes	721
Q19b	No	424
Q19c	No response	19
<b>Q20</b>	<b>Why do you not use the terms interchangeably? Check all that apply.</b> <i>Asked of the 424 respondents who answered "No" in Q19.</i>	<i>n</i>
Q20a	I only use one of those terms, no matter the situation	72

Q20b	They are not interchangeable as they refer to different activities	320
Q20c	Family history is what amateur researchers do	38
Q20d	Genealogy is what amateur researchers do	10
Q20e	Family history is what professional researchers do	8
Q20f	Genealogy is what professional researchers do	45
Q20g	No response	7
<b>Q21</b>	<b>If someone introduces themselves to you as a family historian, do you feel they are which of the following? Check all that apply.</b>	<i>n</i>
Q21a	A hobbyist	532
Q21b	Not serious about research	55
Q21c	Serious about research	579
Q21d	A professional	100
Q21e	No opinion	217
Q21f	No response	16
<b>Q22</b>	<b>If someone introduces themselves to you as a genealogist, do you feel they are which of the following? Check all that apply.</b>	<i>n</i>
Q22a	A hobbyist	54
Q22b	Not serious about research	15
Q22c	Serious about research	723
Q22d	A professional	517
Q22e	No opinion	132
Q22f	No response	16
<b>SECTION 3: CONNECTIONS TO HERITAGE ORGANIZATIONS AND LINEAGE SOCIETIES</b>		
<b>Q23</b>	<b>Has anyone in your family conducted family history or genealogical research?</b>	<i>n</i>
Q23a	Yes	1072
Q23b	I do not know	20
Q23c	No	36
Q23d	No response	36
<b>Q24</b>	<b>Do you have a family member who is a current or former member of a heritage organization or lineage society?</b>	<i>n</i>
Q24a	Yes	705
Q24b	I do not know	180
Q24c	No	245
Q24d	No response	34
<b>Q25</b>	<b>Is there a story in your family that you could qualify for membership in a heritage organization or lineage society?</b>	<i>n</i>
Q25a	Yes	854
Q25b	I do not know	203

Q25c	No	69
Q25d	No response	38
<b>Q26</b>	<b>Have you used a previously submitted heritage organization or lineage society application for general genealogical research?</b>	<i>n</i>
Q26a	Yes	690
Q26b	No	443
Q26c	No response	31
<b>Q27</b>	<b>Do you feel that heritage organization or lineage society applications: Check all that apply.</b>	<i>n</i>
Q27a	Are confirmations of proof for a lineage	440
Q27b	Are clues for research of a lineage	746
Q27c	Should be made available by the organization to the public for use	450
Q27d	Are underused sources	485
Q27e	No opinion	109
Q27f	<i>Other (open text): See raw data and analysis chapters</i>	
<b>SECTION 4: APPLICATION STANDARDS AND DOCUMENTATION</b>		
<b>Q28</b>	<b>Do you think documentation requirements for most organization or society applications are:</b>	<i>n</i>
Q28a	Not strict enough	40
Q28b	Needs improvement	173
Q28c	Fine the way they are	339
Q28d	Some requirements are too strict	231
Q28e	The entire process is too strict	21
Q28f	No opinion	327
Q28g	No response	33
<b>Q29</b>	<b>Do you feel older heritage organization or lineage society applications are proof of a lineage?</b>	<i>n</i>
Q29a	Yes	303
Q29b	No	437
Q29c	Depends	387
Q29d	<i>Depends — please explain (open text): See raw data and analysis chapters</i>	
Q29e	No response	37
<b>Q30</b>	<b>Have you assisted someone with research for a heritage organization or lineage society application?</b>	<i>n</i>
Q30a	Yes	512
Q30b	No	620
Q30c	No response	32
<b>Q31</b>	<b>Did they give you information on the requirements of the heritage organization or lineage society to better assist your work?</b> <i>Asked of the 512 respondents who answered "Yes" in Q30.</i>	<i>n</i>
Q31a	Yes	192

Q31b	No	99
Q31c	No response	221
<b>Q32</b>	<b>Did they tell you which heritage organization or lineage society they were joining to help you focus the research?</b> <i>Asked of the 512 respondents who answered "Yes" in Q30.</i>	<i>n</i>
Q32a	Yes	336
Q32b	No	25
Q32c	No response	151
<b>Q33</b>	<b>Did they give you any past research for the heritage organization or lineage society to build off?</b> <i>Asked of the 512 respondents who answered "Yes" in Q30.</i>	<i>n</i>
Q33a	Yes	247
Q33b	No	119
Q33c	No response	146
<b>Q34</b>	<b>Did they expect you to do very specific research, or locate a specific record, with no background information available so they could join a heritage organization or lineage society?</b> <i>Asked of the 512 respondents who answered "Yes" in Q30.</i>	<i>n</i>
Q34a	Yes	168
Q34b	No	186
Q34c	No response	158
<b>SECTION 5: DNA EVIDENCE IN APPLICATIONS</b>		
<b>Q35</b>	<b>In your opinion, do you feel the use of DNA evidence for a heritage organization or lineage society application: Check all that apply.</b>	<i>n</i>
Q35a	Should not be used to prove a lineage	39
Q35b	Should be used only when documents do not exist	204
Q35c	I do not know enough about DNA research to answer	217
Q35d	Should be used carefully with strict guidelines	648
Q35e	Should be allowed at any time	159
Q35f	No opinion	65
Q35g	<i>Other (open text): See raw data and analysis chapters</i>	
Q35h	No response	47
<b>SECTION 6: EXPERIENCES OF DISCRIMINATION</b>		
<b>Q36</b>	<b>Have you ever experienced discrimination from a heritage organization or lineage society chapter?</b>	<i>n</i>
Q36a	Yes	94
Q36b	No	1022
Q36c	No response	48
<b>Q37</b>	<b>Why do you feel the chapter discriminated against you? Check all that apply.</b> <i>Asked of the 94 respondents who answered "Yes" in Q36.</i>	<i>n</i>
Q37a	Due to my ethnicity	9

Q37b	Due to my religion	12
Q37c	Due to my politics	31
Q37d	Other (open text)	52
<b>Q38</b>	<b>Have you ever experienced discrimination from a heritage organization or lineage society member?</b>	<i>n</i>
Q38a	Yes	163
Q38b	No	932
Q38c	No response	69
<b>Q39</b>	<b>Why do you feel the member discriminated against you? Check all that apply.</b> <i>Asked of the 163 respondents who answered "Yes" in Q38.</i>	<i>n</i>
Q39a	Due to my ethnicity	17
Q39b	Due to my religion	23
Q39c	Due to my politics	75
Q39d	Other (open text)	70
<b>SECTION 7: RESPONDENT INVOLVEMENT AND BACKGROUND</b>		
<b>Q40</b>	<b>Which of the following descriptions reflect your involvement with heritage organizations, lineage societies, or research associated with those fields? Check all that apply.</b> <i>Respondents routed to tailored sub-sections (Q57–Q67, Q68, Q69–Q90, Q91–Q92) based on their selection(s).</i>	<i>n</i>
Q40a	Historian, archivist, librarian, professional genealogist, or employed with a company which does genealogical work	171
Q40b	Member of a lineage or heritage organization	971
Q40c	Not a member of a lineage or heritage organization	353
Q40d	Paid staff member or volunteer who approves applications or assists prospective members	87
Q40e	Genealogist or family history researcher (non-professional) who researches for self, family, or friends at no charge	677
Q40f	No response	60
<b>Q41</b>	<b>In what year did you begin genealogical research?</b>	<i>n</i>
	<i>Four-digit year response: See raw data and analysis chapters</i>	
<b>Q42</b>	<b>Which level do you feel reflects your overall family history or genealogical research ability?</b>	<i>n</i>
Q42a	Novice — I am not confident with anything more than basic research	52
Q42b	Intermediate — I am confident on some subjects, but I still need help	328
Q42c	Advanced — I am confident on most subjects, and I can figure out where to locate the answers	294
Q42d	No response	3
<b>Q43</b>	<b>In genealogy subjects, do you feel that you are mostly self-taught (over 60% of your learning is on your own)?</b>	<i>n</i>
Q43a	Yes	543
Q43b	No	130

Q43c	No response	4
<b>Q44</b>	<b>In genealogy subjects, do you feel that you are mostly taught by others (over 60% of your learning is at meetings, conferences, lectures, webinars, etc.)?</b>	<i>n</i>
Q44a	Yes	181
Q44b	No	490
Q44c	No response	6
<b>Q45</b>	<b>Have you attended any of the following types of family history learning opportunities? Check all that apply.</b>	<i>n</i>
Q45a	Genealogy society meeting	318
Q45b	National-level genealogy conference or seminar	234
Q45c	Regional-level genealogy conference or seminar	288
Q45d	Local-level genealogy conference or seminar	372
Q45e	Special interest groups (SIGs) at a local genealogical society	147
Q45f	Lineage society meeting	326
Q45g	Lineage society workshop	256
Q45h	Webinars sponsored by a company	319
Q45i	None of these	113
Q45j	<i>Other (open text): See raw data and analysis chapters</i>	
Q45k	No response	7
<b>Q46</b>	<b>Have you attended any of the following types of formal learning opportunities? Check all that apply.</b>	<i>n</i>
Q46a	None of these programs	496
Q46b	Boston University Genealogical Certificate	30
Q46c	Excelsior University Genealogical Certificate (any offered)	0
Q46d	National Institute for Genealogical Studies	38
Q46e	Any week-long genealogical institute (GenFed, SLIG, IGHR, GRIPP, etc.)	53
Q46f	ProGen	22
Q46g	<i>Other (open text): See raw data and analysis chapters</i>	
Q46h	No response	35
<b>Q47</b>	<b>Do you attend, or have you attended, any of the following academic institutions for genealogy education? Check all that apply.</b>	<i>n</i>
Q47a	None of these institutions	581
Q47b	Brigham Young University (any campus)	4
Q47c	University of Dundee	0
Q47d	University of Strathclyde	35
Q47e	University of Tasmania	5
Q47f	<i>Other (open text): See raw data and analysis chapters</i>	
Q47g	No response	47
<b>Q48</b>	<b>Do you have an academic qualification in genealogy, family history, or an associated field (history, library, archivist, etc.)? Check all that apply.</b>	<i>n</i>

Q48a	None	536
Q48b	Associate degree	7
Q48c	Bachelor degree	57
Q48d	Postgraduate certificate	12
Q48e	Postgraduate diploma	4
Q48f	Master degree	52
Q48g	Doctoral degree	6
Q48h	No response	19
<b>Q49</b>	<b>Do you have a genealogy certification or non-academic post-nominal?</b>	<i>n</i>
Q49a	Yes	36
Q49b	No	630
Q49c	No response	11
<b>Q50</b>	<b>Which certification(s) do you hold? Check all that apply.</b> <i>Asked of the 36 respondents who answered "Yes" in Q49.</i>	<i>n</i>
Q50a	Professional Learning Certificate in Genealogical Studies (PLCGS)	9
Q50b	Accredited Genealogist (AG)	0
Q50c	Certified Genealogist (CG)	5
Q50d	Certified Genealogist Lecturer (CGL)	0
Q50e	Qualified Genealogist (QG)	0
Q50f	No response	8
Q50g	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q51</b>	<b>Have you considered earning a genealogy certification or non-academic post-nominal?</b> <i>Asked of the 630 respondents who answered "No" in Q49.</i>	<i>n</i>
Q51a	Yes	334
Q51b	No	296
Q51c	No response	47
<b>Q52</b>	<b>Which of the following genealogy certifications or post-nominals have you considered? Check all that apply.</b> <i>Asked of the 334 respondents who answered "Yes" in Q51.</i>	<i>n</i>
Q52a	Professional Learning Certificates in Genealogical Studies (PLCGS)	87
Q52b	Accredited Genealogist (AG)	103
Q52c	Certified Genealogist (CG)	195
Q52d	Certified Genealogist Lecturer (CGL)	19
Q52e	Qualified Genealogist (QG)	66
Q52f	No response	16
Q52g	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q53</b>	<b>Why have you not considered a certification? Check all that apply.</b> <i>Asked of the 296 respondents who answered "No" in Q51.</i>	<i>n</i>
Q53a	Not interested at this time in certification	175
Q53b	Too expensive	46

Q53c	I do not have the time	86
Q53d	I am worried I would fail	9
Q53e	I do not know enough	40
Q53f	No response	5
Q53g	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q54</b>	<b>How many times per year do you attend a local genealogical group function such as workshops, seminars, conferences, etc.?</b> <i>Sliding scale response.</i>	<i>n</i>
	<i>Sliding scale — numeric response: See raw data and analysis chapters</i>	
<b>Q55</b>	<b>How often, on average, do you travel more than 20 miles to conduct genealogical research, even if it is a part of another trip?</b>	<i>n</i>
Q55a	Never	111
Q55b	Once every five years	88
Q55c	Once every couple of years	162
Q55d	Once a year	107
Q55e	Once every six months	73
Q55f	Once every three or four months	63
Q55g	Five or six times a year	46
Q55h	More than once a month	20
Q55i	No response	7
<b>Q56</b>	<b>How much time on average do you spend working on genealogical related activities such as research, record filing, updating your database, or correspondence?</b> <i>Estimated hours per month. Sliding scale response.</i>	<i>n</i>
	<i>Sliding scale — numeric response: See raw data and analysis chapters</i>	
<b>SUB-SECTION A: APPLICATION REVIEWERS AND APPROVERS (N = 87, FROM Q40D)</b>		
<b>Q57</b>	<b>In which of the following ways have you assisted with applications for a heritage organization or lineage society? Check all that apply.</b>	<i>n</i>
Q57a	Staff genealogist	14
Q57b	National officer who approved applications	5
Q57c	State officer who approved applications	5
Q57d	Regional officer who approved applications	5
Q57e	National officer who assisted with the application process	8
Q57f	State officer who assisted with the application process	19
Q57g	Chapter officer who assisted with the application process	60
Q57h	Volunteer who assisted with the application process	61
Q57i	No response	2
Q57j	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q58</b>	<b>How many years have you assisted in reviewing applications for membership in heritage organizations or lineage societies?</b>	<i>n</i>
Q58a	1–5 years	33

Q58b	6–10 years	22
Q58c	11–15 years	9
Q58d	15–20 years	10
Q58e	20 or more years	6
Q58f	No response	7
<b>Q59</b>	<b>For how many organizations have you worked on applications?</b>	<i>n</i>
Q59a	1–2 organizations	55
Q59b	3–4 organizations	14
Q59c	5–6 organizations	8
Q59d	7–8 organizations	2
Q59e	9–10 organizations	0
Q59f	10 or more organizations	5
Q59g	No response	3
<b>Q60</b>	<b>Optional: Which organizations?</b>	<i>n</i>
	<i>Open text response: See raw data and analysis chapters</i>	
<b>Q61</b>	<b>Are you also a member of the same organization(s) where you worked on applications?</b>	<i>n</i>
Q61a	Yes	72
Q61b	No	13
Q61c	No response	2
<b>Q62</b>	<b>Optional: Which organizations?</b>	<i>n</i>
	<i>Open text response: See raw data and analysis chapters</i>	
<b>Q63</b>	<b>When you started assisting with applications, what level of genealogical research training did you have?</b>	<i>n</i>
Q63a	Beginner — mostly self-taught or what I was taught by the organization	16
Q63b	Intermediate — some private research experience and education through outside learning opportunities	48
Q63c	Advanced — many years of research experience including institutes, comfortable with most research issues	19
Q63d	No response	4
<b>Q64</b>	<b>As an application reviewer, what types of errors do you commonly see? Check all that apply.</b>	<i>n</i>
Q64a	The application did not follow directions for formatting	44
Q64b	The application did not provide the required information	60
Q64c	The application used an out-of-date or no longer accepted source	45
Q64d	The application did not provide the required records for documentation of the lineage	67
Q64e	The application did not bring a previously approved lineage up to current standards	35
Q64f	The application used a lineage that is no longer accepted	24
Q64g	No response	5

Q64h	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q65</b>	<b>As an application approver, how much freedom do you have in correcting errors on submitted applications? Check all that apply.</b>	<i>n</i>
Q65a	I am allowed to correct minor errors on an application so it will pass	31
Q65b	I am allowed to perform any type of research to fix an application so it will pass	45
Q65c	I must leave the application as is, no corrections	6
Q65d	I can provide research ideas to the applicant so they can fix the application	45
Q65e	No response	10
Q65f	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q66</b>	<b>Does the organization or society flag previous applications if they are incorrect, showing applicants and members that the line contains a problem?</b>	<i>n</i>
Q66a	Yes	75
Q66b	No	9
Q66c	No response	3
<b>Q67</b>	<b>How does the organization flag errors on applications? Check all that apply.</b> <i>Asked of the 75 respondents who answered "Yes" in Q66.</i>	<i>n</i>
Q67a	Internally — only staff can see the flag	24
Q67b	Posted on the members-only website	35
Q67c	Posted on the public website	39
Q67d	Errors are published in the members newsletter	4
Q67e	No response	13
Q67f	<i>Other (open text): See raw data and analysis chapters</i>	
<b>SUB-SECTION B: NON-MEMBERS OF HERITAGE ORGANIZATIONS (N = 353, FROM Q40C)</b>		
<b>Q68</b>	<b>Why have you decided not to join a heritage organization or lineage society? Choose all that apply.</b>	<i>n</i>
Q68a	<i>I do not qualify for one: See raw data and analysis chapters</i>	
Q68b	<i>I do not know enough about these groups: See raw data and analysis chapters</i>	
Q68c	<i>I have a negative opinion of these groups: See raw data and analysis chapters</i>	
Q68d	<i>They are too expensive: See raw data and analysis chapters</i>	
Q68e	<i>I am too busy right now: See raw data and analysis chapters</i>	
Q68f	<i>Maybe when I retire: See raw data and analysis chapters</i>	
Q68g	<i>No response: See raw data and analysis chapters</i>	
Q68h	<i>Other (open text): See raw data and analysis chapters</i>	
<b>SUB-SECTION C: MEMBERS OF HERITAGE ORGANIZATIONS (N = 971, FROM Q40B)</b>		
<b>Q69</b>	<b>How old were you when you joined your first heritage organization or lineage society?</b>	<i>n</i>
Q69a	Under 18	33
Q69b	18–30	94
Q69c	31–40	115

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Q69d	41–50	122
Q69e	51–60	146
Q69f	61–70	94
Q69g	71–80	8
Q69h	81 or older	2
Q69i	<i>No response: See raw data and analysis chapters</i>	
<b>Q70</b>	<b>Which of the following reasons describes why you joined a heritage organization or lineage society? Check all that apply.</b>	<i>n</i>
Q70a	A relative submitted my application	78
Q70b	A friend convinced me to join	73
Q70c	I wanted to verify my genealogy research	288
Q70d	It was a sense of pride in my family	368
Q70e	I wanted to prove a family story	170
Q70f	The organization supports causes I agree with	227
Q70g	The organization has a "perk" I enjoy (travel, regalia, publications, events, etc.)	66
Q70h	No response	357
Q70i	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q71</b>	<b>How many heritage organizations or lineage societies have you applied to?</b>	<i>n</i>
Q71a	1–2	383
Q71b	3–4	108
Q71c	5–6	45
Q71d	7–8	24
Q71e	9–10	12
Q71f	11 or more	35
Q71g	No response	364
<b>Q72</b>	<b>How many heritage organizations or lineage societies do you belong to?</b>	<i>n</i>
Q72a	1–2	407
Q72b	3–4	97
Q72c	5–6	38
Q72d	7–8	22
Q72e	9–10	11
Q72f	11 or more	32
Q72g	No response	364
<b>Q73</b>	<b>Optional: Which heritage organizations or lineage societies do you belong to?</b>	<i>n</i>
	<i>Open text response: See raw data and analysis chapters</i>	
<b>Q74</b>	<b>Have you ever resigned as a member, or been dropped from the rolls, of a heritage organization or lineage society?</b>	<i>n</i>
Q74a	Yes	84

Q74b	No	529
Q74c	No response	358
<b>Q75</b>	<b>Why did you leave? Check all that apply.</b> <i>Asked of the 84 respondents who answered "Yes" in Q74.</i>	<i>n</i>
Q75a	Financial reasons	15
Q75b	I did not fit in with the culture of the group	33
Q75c	Needed to cut back on activities	21
Q75d	The organization was not what I thought it was	15
Q75e	No response	1
Q75f	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q76</b>	<b>Do you belong to a heritage organization or lineage society that did not require lineage documentation (certificates, records, etc.) to be submitted?</b>	<i>n</i>
Q76a	Yes	86
Q76b	No	523
Q76c	No response	362
<b>Q77</b>	<b>Which organization(s) did not require lineage documentation?</b> <i>Asked of the 86 respondents who answered "Yes" in Q76.</i>	<i>n</i>
	<i>Open text response: See raw data and analysis chapters</i>	
<b>Q78</b>	<b>Were you able to join a heritage organization or lineage society under a previously submitted lineage (often called dovetailing)?</b>	<i>n</i>
Q78a	Yes	309
Q78b	No	292
Q78c	No response	370
<b>Q79</b>	<b>Were you required to bring the previous application to current standards of the organization for your application, or could you use it "as is"?</b> <i>Asked of the 309 respondents who answered "Yes" in Q78.</i>	<i>n</i>
Q79a	Brought up to date	187
Q79b	Submitted as it was	95
Q79c	I do not know	27
Q79d	No response	0
<b>Q80</b>	<b>Are there any heritage organizations or lineage societies which did not accept an application from you due to the lineage you submitted?</b>	<i>n</i>
Q80a	Yes	49
Q80b	No	559
Q80c	No response	363
<b>Q81</b>	<b>What reason was given for denying the application? Check all that apply.</b> <i>Asked of the 49 respondents who answered "Yes" in Q80.</i>	<i>n</i>
Q81a	I linked to an older paper which needed updating	5
Q81b	I did not provide all the documentation required	16
Q81c	The lineage was flagged or no longer accepted by the organization	15
Q81d	It was not formatted correctly	1

Q81e	I do not know	0
Q81f	No response	0
Q81g	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q82</b>	<b>Do you have a gateway ancestor? (defined as an ancestor whose lineage allows quick connections to many organizations)</b>	<i>n</i>
Q82a	Yes	315
Q82b	No	290
Q82c	No response	366
<b>Q83</b>	<b>How did you learn who your gateway ancestor was?</b> <i>Asked of the 315 respondents who answered "Yes" in Q82.</i>	<i>n</i>
Q83a	It was passed down as a family story	31
Q83b	I discovered it through my personal genealogy research	200
Q83c	A member of my family performed the genealogy research and told me	60
Q83d	A researcher (hired or pro bono) found the information for me	11
Q83e	No response	1
Q83f	Other (open text)	12
<b>Q84</b>	<b>How many heritage organizations or lineage societies did you join through the same direct family line?</b>	<i>n</i>
Q84a	0	71
Q84b	1–2	426
Q84c	3–4	80
Q84d	5–6	12
Q84e	7–8	6
Q84f	9–10	2
Q84g	10 or more	11
Q84h	No response	363
<b>Q85</b>	<b>Have you ever hired a professional genealogist to help you research or complete an application for a heritage organization or lineage society?</b>	<i>n</i>
Q85a	Yes	63
Q85b	No	546
Q85c	No response	362
<b>Q86</b>	<b>Did the professional researcher advertise they were a lineage society specialist?</b> <i>Asked of the 63 respondents who answered "Yes" in Q85.</i>	<i>n</i>
Q86a	Yes	63
Q86b	No	546
Q86c	No response	362
<b>Q87</b>	<b>How did you learn about the professional researcher?</b> <i>Asked of the 63 respondents who answered "Yes" in Q86.</i>	<i>n</i>
Q87a	Recommendation from friend or family	16
Q87b	The Association of Professional Genealogists (APG) website	10

Q87c	Board for Certification of Genealogists (BCG) website	4
Q87d	Register for Qualified Genealogists (QG) website	1
Q87e	Advertisement in journal, newsletter, or magazine	7
Q87f	Pamphlet or directory from a repository	1
Q87g	Other (open text)	24
<b>Q88</b>	<b>Describe your experiences with hiring a professional genealogist. Check all that apply.</b> <i>Asked of the 63 respondents who answered "Yes" in Q86.</i>	<i>n</i>
Q88a	They were excellent; I have used them for many projects	19
Q88b	Their work was not to the standard I expected	9
Q88c	The fee was too high for what I received	13
Q88d	The fee was reasonable for what I received	26
Q88e	They were quick to reply and communicative	30
Q88f	It was hard to get a hold of them and they did not communicate well	2
Q88g	They were well educated	24
Q88h	I was unsure of their qualifications	3
Q88i	I received timely and well-written reports	36
Q88j	The reports I received were confusing	2
Q88k	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q89</b>	<b>Did you rely on someone in the organization or chapter to conduct the genealogical research for your application?</b>	<i>n</i>
Q89a	Yes	133
Q89b	No	477
Q89c	No response	361
<b>Q90</b>	<b>Did you conduct the majority of the genealogical research for your application?</b>	<i>n</i>
Q90a	Yes	509
Q90b	No	100
Q90c	No response	362
<b>SUB-SECTION D: PROFESSIONAL AND INSTITUTIONAL REPRESENTATIVES (N = 171, FROM Q40A)</b>		
<b>Q91</b>	<b>Which of the following describes your type of employment? Check all that apply.</b>	<i>n</i>
Q91a	I work at an archive	22
Q91b	I work at a museum	8
Q91c	I work at a library	31
Q91d	I work for a genealogical company	11
Q91e	I work for an educational institution	16
Q91f	I am a historian	40
Q91g	I am an archivist	25

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Q91h	I am a librarian	29
Q91i	I am a curator	6
Q91j	I am a professional genealogist	70
Q91k	I am an educator (any level)	39
Q91l	No response	2
Q91m	<i>Other (open text): See raw data and analysis chapters</i>	
<b>Q92</b>	<b>Where do you interact with family history or genealogical researchers? Check all that apply.</b>	<i>n</i>
Q92a	At a research repository, library, or archive	134
Q92b	In a classroom situation	55
Q92c	At conferences as a lecturer	52
Q92d	At conferences in an exhibitor booth	29
Q92e	Through social media	126
Q92f	Through a website interface or chat feature	50
Q92g	As part of a research team (no direct contact)	20
Q92h	Through my paid work	84
Q92i	No response	2
<b>Total: 92 survey questions across 8 sections and sub-sections; 478 discrete response options. N = 1,164 survey respondents.</b>		

## Appendix 7: Statistical Formulas

This appendix presents the statistical methods, formulas, and procedures used for the data analysis in this thesis. It is divided into sections based on the subheadings in the data analysis chapter.

### Formula and explanations

**Standard Error and Confidence Interval Formula:** Confidence intervals are used when estimating a population parameter from a sample. They provide a range of values within which the actual population parameter is likely to fall, with a specified level of confidence (typically 95%).

**The standard error (SE) for a proportion is calculated as:**

$$SE = \sqrt{p(1-p)/n}$$

Where:

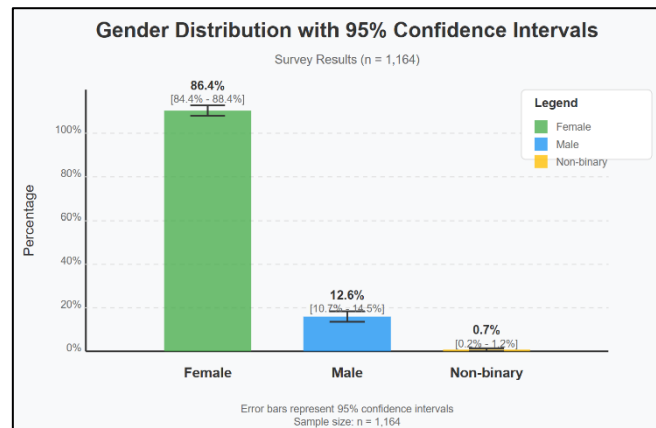
p = proportion or percentage (in decimal form)

n = sample size

The confidence interval (CI) is then calculated as:

$$CI = p \pm z \times SE$$

Where z is the z-score (1.96 for 95% confidence level)



**Chi-Square Tests:**

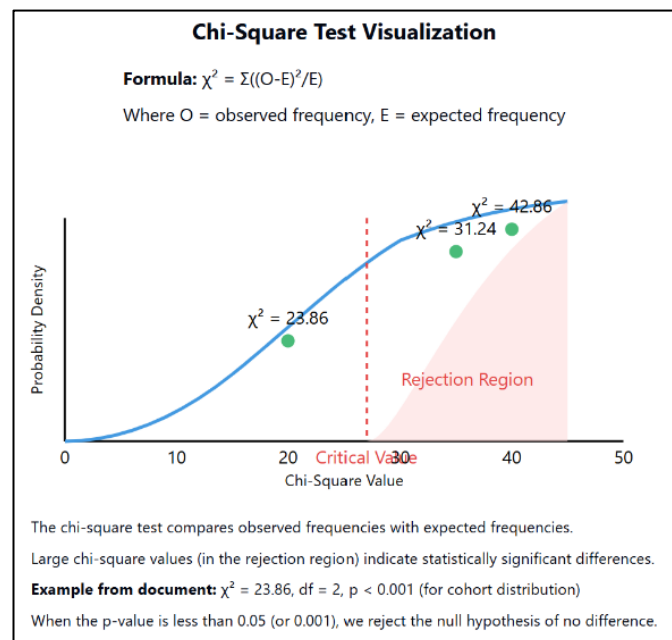
$$\chi^2 = \sum((O-E)^2/E)$$

Where:

O = observed frequency

E = expected frequency

df = degrees of freedom



## **Introduction and Demographics Sections**

- **Gender Distribution Analysis**
  - Standard Error (SE) calculation: Used for calculating confidence intervals for gender proportions
  - Formula:  $SE = \sqrt{p(1-p)/n}$  where p is the proportion and n is the sample size
  - Example: SE for female proportion =  $\sqrt{(0.864(0.136)/1164)} = 0.010$
  - 95% Confidence Intervals: Applied to gender distribution percentages
  - Female: 86.4%  $\pm$  2.0% (95% CI: [84.4%, 88.4%])
  - Male: 12.6%  $\pm$  1.9% (95% CI: [10.7%, 14.5%])
  - Non-binary: 0.7%  $\pm$  0.5% (95% CI: [0.2%, 1.2%])
- **Income Distribution Analysis**
  - Confidence Intervals for income brackets:
  - Above \$60,000: 61%  $\pm$  2.8% (95% CI: [58.2%, 63.8%])
  - Standard Error calculation:  $SE = \sqrt{(0.61(0.39)/1164)} = 0.014$
- **Educational Attainment**
  - Confidence Intervals for education levels:
  - College Degrees: 83%  $\pm$  2.2% (95% CI: [80.8%, 85.2%])
  - Standard Error calculation:  $SE = \sqrt{(0.83(0.17)/1164)} = 0.011$
- **Cohort Analysis**
  - Chi-square test for cohort distribution:  $\chi^2 = 23.86$ ,  $df = 2$ ,  $p < 0.001$
  - Confidence Intervals for cohort proportions:
  - Primary Cohort (1953-1964): 35.4%  $\pm$  2.7% (95% CI: [32.7%, 38.1%])
  - Secondary Cohort (1978-1982): 24.6%  $\pm$  2.5% (95% CI: [22.1%, 27.1%])
- **Geographic Analysis Section: Geographic Distribution**
  - Confidence Intervals for geographic proportions:
  - Suburban: 40%  $\pm$  2.8% (95% CI: [37.2%, 42.8%])
  - Urban: 26%  $\pm$  2.5% (95% CI: [23.5%, 28.5%])
  - Small Town: 20%  $\pm$  2.3% (95% CI: [17.7%, 22.3%])
  - Rural: 14%  $\pm$  2.0% (95% CI: [12.0%, 16.0%])
  - Chi-square test:  $\chi^2 = 31.24$ ,  $df = 3$ ,  $p < 0.001$
- **Distribution Analysis Section: Political Orientation Distribution**
  - Confidence Intervals for orientation proportions:
  - No stated orientation: 69%  $\pm$  2.7% (95% CI: [66.3%, 71.7%])
  - Conservative: 14%  $\pm$  2.0% (95% CI: [12.0%, 16.0%])
  - Moderate: 14%  $\pm$  2.0% (95% CI: [12.0%, 16.0%])
  - Liberal: 3%  $\pm$  1.0% (95% CI: [2.0%, 4.0%])
  - Chi-square test:  $\chi^2 = 38.24$ ,  $df = 3$ ,  $p < 0.001$
- **Barrier Analysis Section: Development Obstacle Assessment**
  - Confidence Intervals for barriers:
  - Financial constraints: 42%  $\pm$  2.8% (95% CI: [39.2%, 44.8%])
  - Geographic limitations: 31%  $\pm$  2.7% (95% CI: [28.3%, 33.7%])
  - Documentation access: 28%  $\pm$  2.6% (95% CI: [25.4%, 30.6%])
  - Technology adaptation: 24%  $\pm$  2.5% (95% CI: [21.5%, 26.5%])

## Appendix 8: Survey Respondent Membership in Heritage Organizations and Lineage Societies

The following table presents all organizations named in response to Survey Question 72: "How many heritage organizations or lineage societies do you belong to? Optional — please list them." Responses were provided by the 971 survey respondents who identified as current members of a heritage organization or lineage society (Q40b). Organizations are grouped into four tiers by frequency of mention. Percentages reflect the proportion of the member sub-group (n = 971) that listed each organization. Duplicate and variant name entries have been standardized; family associations and clan societies appear in Tier 4.

Organization or Society	Respondents (n)
<b>TIER 1 — TEN OR MORE RESPONDENTS</b>	
<i>Organizations with the highest reported membership rates among survey respondents</i>	
National Society Daughters of the American Revolution (NSDAR)	416 (42.8%)
National Society Daughters of American Colonists	233 (24.0%)
General Society of Mayflower Descendants (GSMD)	95 (9.8%)
National Society Daughters of the War of 1812	59 (6.1%)
National Society Colonial Dames of the Seventeenth Century	52 (5.4%)
United Daughters of the Confederacy (UDC)	34 (3.5%)
Sons of the American Revolution (SAR)	29 (3.0%)
National Society Colonial Dames of America	28 (2.9%)
Jamestowne Society	25 (2.6%)
Society of Descendants of Washington's Army at Valley Forge	15 (1.5%)
Daughters of Union Veterans of the Civil War	14 (1.4%)
Children of the American Revolution (CAR)	11 (1.1%)
National Society Daughters of the Union 1861–1865	11 (1.1%)
National Society Descendants of American Farmers	11 (1.1%)
Sons of Union Veterans of the Civil War (SUVCW)	11 (1.1%)
National Huguenot Society	10 (1.0%)
National Society Dames of the Court of Honor	10 (1.0%)
National Society Daughters of Founders and Patriots	10 (1.0%)
<b>TIER 2 — FIVE TO NINE RESPONDENTS</b>	
<i>Organizations with moderate membership representation among survey respondents</i>	
Associated Daughters of Early American Witches	9 (0.9%)
Daughters of the Republic of Texas	9 (0.9%)
National Society Daughters of Colonial Wars	9 (0.9%)

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Southern Dames of America	8 (0.8%)
Continental Society Daughters of Indian Wars	7 (0.7%)
General Society of the War of 1812	7 (0.7%)
National Society Sons and Daughters of the Pilgrims	7 (0.7%)
Women Descendants of the Ancient and Honorable Artillery Company	7 (0.7%)
National Society Magna Charta Dames and Barons	6 (0.6%)
First Families of Kentucky	5 (0.5%)
National Society of New England Women	5 (0.5%)
Order of the Crown of Charlemagne in the United States	5 (0.5%)
<b>TIER 3 — TWO TO FOUR RESPONDENTS</b>	
<i>Organizations with limited but notable membership among survey respondents</i>	
Flagon and Trencher (Descendants of Colonial Tavern Keepers)	4 (0.4%)
Winthrop Society	4 (0.4%)
Alden Kindred of America	3 (0.3%)
American Rosie the Riveter Association	3 (0.3%)
Descendants of Early Postmasters 1607–1900	3 (0.3%)
First Families of Ohio	3 (0.3%)
La Société des Filles du Roi et Soldats du Carignan	3 (0.3%)
Military Order of Foreign Wars of the United States	3 (0.3%)
Pilgrim Edward Doty Society	3 (0.3%)
Society of Indiana Pioneers	3 (0.3%)
Sons of American Colonists	3 (0.3%)
Sons of Confederate Veterans (SCV)	3 (0.3%)
Colonial Order of the Crown	2 (0.2%)
Daughters of Spanish-American War Veterans (Daughters of '98)	2 (0.2%)
Daughters of Utah Pioneers	2 (0.2%)
Descendants of Sheriffs and Constables of Colonial and Antebellum America	2 (0.2%)
Descendants of the Battle of Kings Mountain	2 (0.2%)
Dutch Colonial Society	2 (0.2%)
Elder William Brewster Society	2 (0.2%)
Guild of Colonial Artisans and Tradesmen 1607–1783	2 (0.2%)
National Society Descendants of Colonial Indentured Servants	2 (0.2%)
National Society Descendants of Textile Workers of America	2 (0.2%)
Order of the First World War	2 (0.2%)
Pilgrim Henry Samson Kindred	2 (0.2%)
Pilgrim Hopkins Heritage Society	2 (0.2%)
Pilgrim John Howland Society	2 (0.2%)

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Society of Daughters of Holland Dames	2 (0.2%)
Sons and Daughters of the Colonial and Antebellum Bench and Bar 1565–1861	2 (0.2%)
Sons and Daughters of the United States Middle Passage	2 (0.2%)
Sons and Daughters of Virginia Founding Fathers	2 (0.2%)
Sons of the Revolution	2 (0.2%)
Swedish Colonial Society	2 (0.2%)
The First Families of the Twin Territories	2 (0.2%)
The Fuller Society	2 (0.2%)
The Military Order of the Loyal Legion of the United States (MOLLUS)	2 (0.2%)
Thomas Minor Society	2 (0.2%)
Winslow Heritage Society	2 (0.2%)
<b>TIER 4 — SINGLE RESPONDENT</b>	
<i>Organizations reported by exactly one survey respondent; includes family associations and clan societies</i>	
American Descendants of the House of Burgesses 1619–1699	1 (0.1%)
Armstrang Clan Association	1 (0.1%)
Bolling Family Association	1 (0.1%)
Burden Clan	1 (0.1%)
Clan Donald	1 (0.1%)
Clan Guthrie	1 (0.1%)
Clan Johnston(e)	1 (0.1%)
Clan Lamont	1 (0.1%)
Clan MacBean	1 (0.1%)
Clan MacLellan	1 (0.1%)
Clan McDuff	1 (0.1%)
Clan Montgomery	1 (0.1%)
Clan Murray	1 (0.1%)
Clan Turnbull	1 (0.1%)
Daughters of the British Empire	1 (0.1%)
Delano Kindred	1 (0.1%)
Descendant of the Knights of the Garter	1 (0.1%)
Descendants of American POWs	1 (0.1%)
Descendants of Brian Boru	1 (0.1%)
Descendants of Cape Cod and the Islands	1 (0.1%)
Descendants of Colonial Mothers 1607–4 July 1776	1 (0.1%)
Descendants of Continental Colonial Officers	1 (0.1%)
Descendants of Founders of New Jersey	1 (0.1%)

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Descendants of the Declaration of Independence	1 (0.1%)
Descendants of the Founders of Ancient Windsor	1 (0.1%)
Descendants of the Lacemakers of Calais	1 (0.1%)
Descendants of the Signers of the Declaration of Independence	1 (0.1%)
Direct Descendants and Kin of David Crockett	1 (0.1%)
DuBois Family Association	1 (0.1%)
Eaton Families Association	1 (0.1%)
Families of Antebellum Missouri	1 (0.1%)
Felton Family Association	1 (0.1%)
First Families of Pennsylvania	1 (0.1%)
First Families of Tennessee	1 (0.1%)
First Families of the Cherokee	1 (0.1%)
First Settlers of the Shenandoah Valley	1 (0.1%)
Francis Wyman Association	1 (0.1%)
Frisbie-Frisbee Family Association of America	1 (0.1%)
Hereditary Order of Descendants of Loyalists and Patriots of the American Revolution	1 (0.1%)
Hereditary Order of the Families of the Presidents and First Ladies of America	1 (0.1%)
Hereditary Order of the Red Dragon	1 (0.1%)
Huguenot Society of South Carolina	1 (0.1%)
Huguenot Society of the Founders of Manakin in the Colony of Virginia	1 (0.1%)
Isaac Cummings Family Association	1 (0.1%)
Jacob Hochstetler Family Association	1 (0.1%)
Ladies of the Grand Army of the Republic	1 (0.1%)
Lathrop Family Foundation	1 (0.1%)
Legion of Vikings and Valkyries	1 (0.1%)
Ligon Family and Kinsmen Association	1 (0.1%)
Military Order of the Carabao	1 (0.1%)
Military Order of the Southern Cross in the Pacific Theater	1 (0.1%)
Military Order of the Stars and Bars	1 (0.1%)
Military Order of the World Wars	1 (0.1%)
Minnesota Territorial Pioneers	1 (0.1%)
National Order of the Korean War	1 (0.1%)
National Society Descendants of Early Quakers	1 (0.1%)
National Society of Americans of Royal Descent	1 (0.1%)
National Society Washington Family Descendants	1 (0.1%)
Naval Order of the United States	1 (0.1%)

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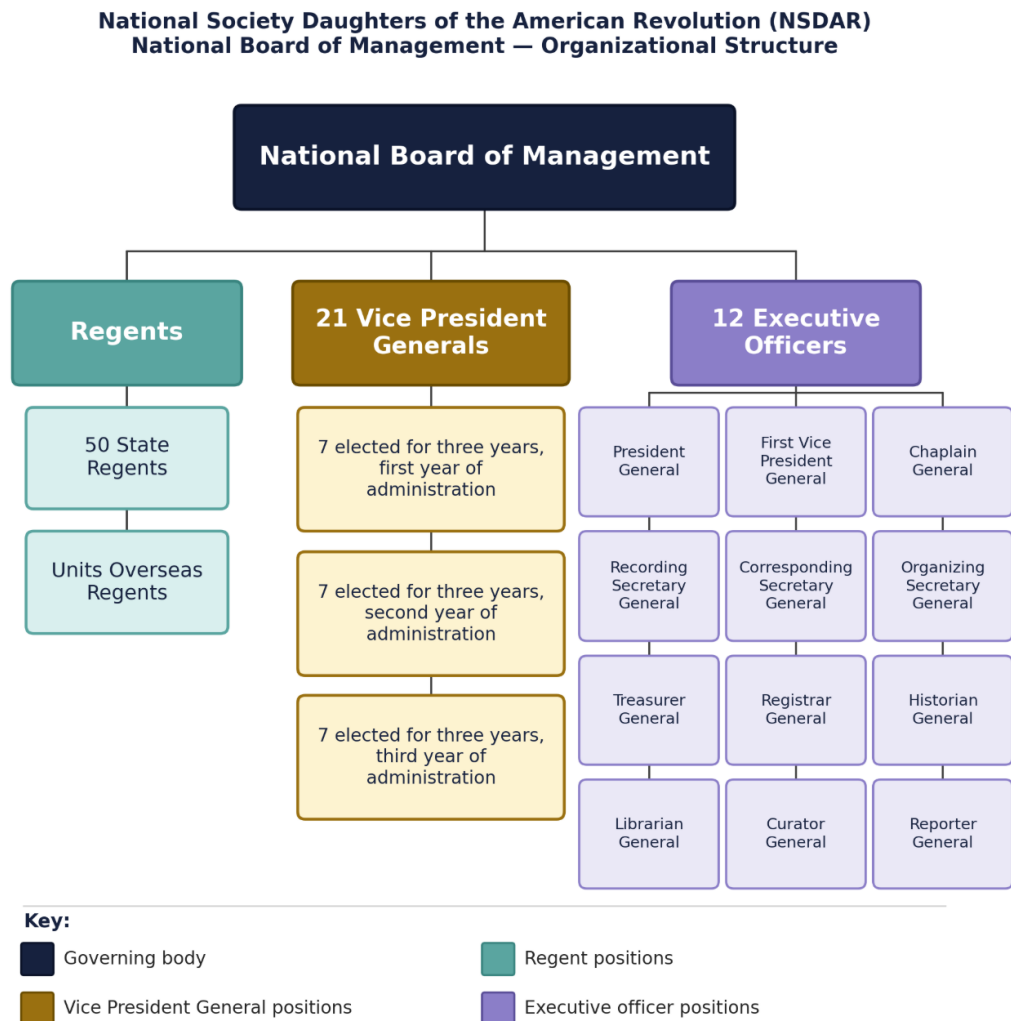
Nebraska Territorial Pioneers Association	1 (0.1%)
Noble Society of Celts	1 (0.1%)
Northern Nevada Society of Scottish Clans	1 (0.1%)
Nye Family of America Association	1 (0.1%)
Order of Alba	1 (0.1%)
Order of American Cousins of the Present and Future Sovereigns of Great Britain	1 (0.1%)
Order of Bacon's Rebellion	1 (0.1%)
Order of Colonial Lords of Manors in America	1 (0.1%)
Order of Descendants of Ancient Planters	1 (0.1%)
Order of Descendants of Colonial Cavaliers	1 (0.1%)
Order of Descendants of Justiciars	1 (0.1%)
Order of First Families of Virginia	1 (0.1%)
Order of Indian Wars of the United States	1 (0.1%)
Order of the First Families of Mississippi 1699–1817	1 (0.1%)
Order of the Native Daughters of the Golden West	1 (0.1%)
Order of the Steel Magnolias	1 (0.1%)
Order of Washington	1 (0.1%)
Order Sons and Daughters of Italy in America	1 (0.1%)
Pierre Chastain Family Association	1 (0.1%)
Pilgrim Francis Cooke Society	1 (0.1%)
Pioneer Families of Hancock County, Ohio	1 (0.1%)
Pioneer Families of Seneca County, Ohio	1 (0.1%)
Rich Family Association	1 (0.1%)
Snipes Family of America	1 (0.1%)
Society of Cincinnati	1 (0.1%)
Society of Descendants of Lady Godiva	1 (0.1%)
Society of Mareen Duvall Descendants	1 (0.1%)
Society of Middletown First Settlers	1 (0.1%)
Society of Sons and Daughters of World War II Veterans	1 (0.1%)
Society of the Ark and Dove	1 (0.1%)
Son of a Witch	1 (0.1%)
Sons and Daughters of Erin	1 (0.1%)
Sons and Daughters of Virginia Founding Families	1 (0.1%)
South Australian Pioneers Association	1 (0.1%)
Sons and Daughters of the Middle Passage	1 (0.1%)
Territorial Daughters of Colorado	1 (0.1%)
Territorial Guard Society of Indiana	1 (0.1%)

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Texas First Families	1 (0.1%)
Thomas Rogers Society	1 (0.1%)
Thomas Rogers Society	1 (0.1%)
United Empire Loyalists' Association of Canada	1 (0.1%)
Vaught Association of the United States of America	1 (0.1%)
Wingfield Family Society	1 (0.1%)
<b>169 distinct organizations listed across all four tiers</b>	<b>1348 total</b>

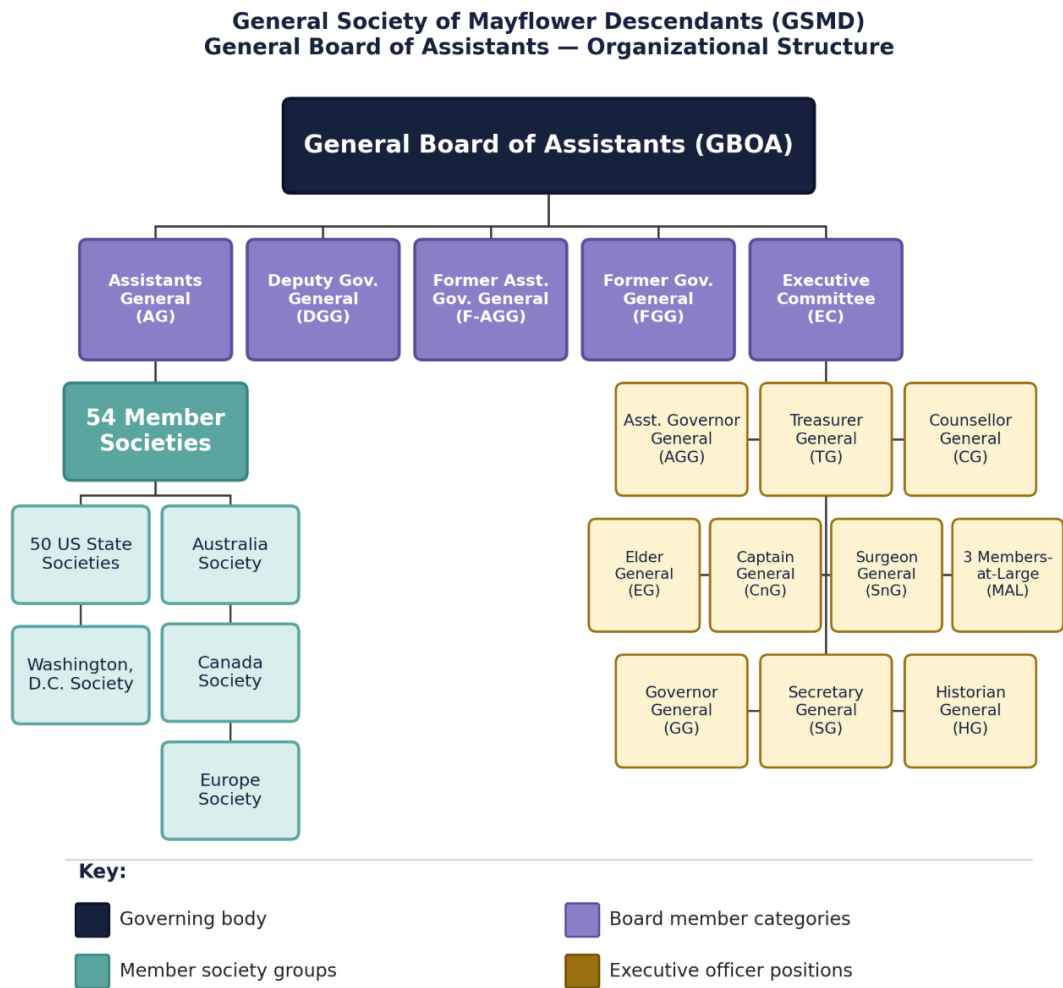
**Note:** Survey question Q72 was optional; not all 971 member-respondents listed organizations. Respondents could list multiple organizations. The total mention count therefore exceeds the number of respondents who answered this question. Several respondents listed organizations not found in the Hereditary Society Community of the United States directory, including family and clan associations, which are included here as reported. See Chapter 5 for full analysis of membership patterns.

## Appendix 9: NSDAR Leadership Diagram



Source: National Society Daughters of the American Revolution. Structure reflects governance during the study period 1970–2020.

## Appendix 10: GSMD Leadership Diagram



Source: General Society of Mayflower Descendants. Structure reflects governance during the study period 1970–2020.

## Appendix 11: Mayflower Passengers

The following table lists all known passengers aboard the Mayflower during its 1620 voyage from Leiden to Plymouth Colony. Crew members are excluded unless hired to remain in the colony as permanent settlers. Passengers are listed alphabetically by surname. The Qualifying Ancestor (QA) columns indicate the year each individual was formally recognized as a qualifying ancestor by the General Society of Mayflower Descendants (GSMD); blank cells indicate the individual is not a qualifying ancestor. Not all passengers were members of the Leiden congregation or Separatist Puritans.

Key										
<b>Row shading:</b> Teal rows = child passengers. Alternating light purple / white rows = adult passengers.										
<b>Name cell shading:</b> Gold-tinted name cell = passenger died during the first winter (1620–21). Applies to both adult and child rows.										
<b>Symbols:</b> ✓ = confirmed    – = none recorded    ? = unknown										
<b>Qualifying Ancestor (QA) columns:</b> ✓ = formally recognized as a qualifying ancestor by the GSMD in that year. Blank = not a qualifying ancestor, or not yet recognized by that year.										
<b>Gender column:</b> <i>W</i> = wife or woman whose given name is not recorded in surviving sources.										
Passenger Name	Gender	Role	Died 1620–21	Known Desc.	Qualifying Ancestor Year Added					
					1897	1920	1977	1985	2005	2010
Alden , <i>John</i>	Male	Crew		✓	✓					
Allerton , <i>Bartholomew</i>	Child	Passenger		✓			✓			
Allerton , <i>Isaac</i>	Male	Passenger		✓	✓		✓			
Allerton , <i>John</i>	Male	Crew	✓	–						
Allerton , <i>Mary</i>	Child	Passenger		✓						✓
Allerton , <i>Mary (Norris)</i>	Female	Passenger	✓	✓						✓
Allerton , <i>Remember</i>	Child	Passenger		✓						✓
Billington , <i>Eleanor</i>	Female	Passenger		✓						✓
Billington , <i>Francis</i>	Female	Passenger		✓			✓			✓
Billington , <i>John</i>	Male	Passenger		✓	✓		✓			
Bradford , <i>Dorothy (May)</i>	Female	Passenger	✓	–						
Bradford , <i>William</i>	Male	Passenger		✓	✓					
Brewster , <i>Love/Truelove</i>	Child	Passenger		✓						✓
Brewster , <i>Mary</i>	Female	Passenger		✓						✓
Brewster , <i>William</i>	Male	Passenger		✓	✓					
Brewster , <i>Wrestling</i>	Child	Passenger		–						
Britteridge , <i>Richard</i>	Male	Passenger	✓	–						

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<b>Browne , Peter</b>	Male	Passenger		✓	✓					
<b>Butten , William (died on voyage)</b>	Child	Servant	✓	–						
<b>Carter , Robert</b>	Male	Servant	✓	–						
<b>Carver , John</b>	Male	Passenger		–						
<b>Carver , Katherine (Leggett) (White)</b>	Female	Passenger		–						
<b>Chilton , James</b>	Male	Passenger	✓	✓	✓					
<b>Chilton , Mary</b>	Female	Passenger		✓						✓
<b>Chilton , Mrs. James</b>	Female	Passenger		✓						✓
<b>Clarke , Richard</b>	Male	Passenger	✓	–						
<b>Cooke , Francis</b>	Male	Passenger		✓	✓					
<b>Cooke , John</b>	Male	Passenger		✓						✓
<b>Cooper , Humility</b>	Child	Passenger		–						
<b>Crackstone , John (senior)</b>	Male	Passenger		–						
<b>Crackston , John (junior)</b>	Male	Passenger	✓	–						
<b>Doty , Edward</b>	Male	Servant		✓	✓					
<b>Eaton , Francis</b>	Female	Passenger		✓	✓					
<b>Eaton , Samuel</b>	Child	Passenger		✓			✓			
<b>Eaton , Sarah</b>	Female	Passenger	✓	✓						✓
<b>English , Thomas</b>	Male	Crew	✓	–						
<b>Fletcher , Moses</b>	Male	Passenger	✓	✓				✓		
<b>Fuller , Edward</b>	Male	Passenger	✓	✓	✓					
<b>Fuller , Mrs. Edward</b>	Female	Passenger	✓	✓						✓
<b>Fuller , Samuel (child)</b>	Child	Passenger		✓			✓			
<b>Fuller , Samuel (adult)</b>	Male	Passenger		✓	✓					
<b>Gardiner , Richard</b>	Male	Passenger		–						
<b>Goodman , John</b>	Male	Passenger		–						
<b>Holbeck , William</b>	Male	Servant	✓	–						
<b>Hooke , John</b>	Male	Servant	✓	–						
<b>Hopkins , Constance</b>	Female	Passenger		✓						✓
<b>Hopkins , Damaris</b>	Child	Passenger	✓	–						
<b>Hopkins , Elizabeth (Fisher)</b>	Female	Passenger		✓						✓
<b>Hopkins , Giles</b>	Male	Passenger		✓			✓			
<b>Hopkins , Oceanus (born on Mayflower)</b>	Child	Passenger		–						
<b>Hopkins , Stephen</b>	Male	Passenger		✓	✓					
<b>Howland , John</b>	Male	Servant		✓	✓					
<b>Langemore , John</b>	Male	Servant	✓	–						
<b>Latham , William</b>	Child	Servant		–						

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<b>Leister</b> , <i>Edward</i>	Male	Servant		?						
<b>Margesson</b> , <i>Edmund</i>	Male	Passenger	✓	–						
<b>Martin</b> , <i>Christopher</i>	Male	Passenger	✓	–						
<b>Martin</b> , <i>Mary (Prower)</i>	Female	Passenger	✓	–						
<b>Minter</b> , <i>Desire</i>	Female	Servant		?						
<b>More</b> , <i>Ellen/Elinor</i>	Child	Servant	✓	–						
<b>More</b> , <i>Jasper</i>	Child	Servant	✓	–						
<b>More</b> , <i>Mary</i>	Child	Servant	✓	–						
<b>More</b> , <i>Richard</i>	Child	Servant		✓		✓	✓			
<b>Mullins</b> , <i>Alice</i>	Female	Passenger	✓	✓						✓
<b>Mullins</b> , <i>Joseph</i>	Male	Passenger		–						
<b>Mullins</b> , <i>Priscilla</i>	Female	Passenger		✓						✓
<b>Mullins</b> , <i>William</i>	Male	Passenger	✓	✓				✓		
<b>Priest</b> , <i>Degory</i>	Male	Passenger	✓	✓	✓					
<b>Prower</b> , <i>Solomon</i>	Male	Passenger	✓	–						
<b>Rigsdale</b> , <i>Alice</i>	Female	Passenger	✓	?						
<b>Rigsdale</b> , <i>John</i>	Male	Passenger	✓	?						
<b>Rogers</b> , <i>Joseph</i>	Male	Passenger		✓	✓					
<b>Rogers</b> , <i>Thomas</i>	Male	Passenger	✓	✓			✓			
<b>Samson</b> , <i>Henry</i>	Male	Passenger		✓	✓					
<b>Soule</b> , <i>George</i>	Male	Servant		✓	✓					
<b>Standish</b> , <i>Myles</i>	Male	Passenger		✓	✓					
<b>Standish</b> , <i>Rose</i>	Female	Passenger	✓	–						
<b>Story</b> , <i>Elias</i>	Male	Servant	✓	–						
<b>Thompson/Thomson</b> , <i>Edward</i>	Male	Servant	✓	?						
<b>Tilley</b> , <i>Ann (Cooper)</i>	Female	Passenger	✓	–						
<b>Tilley</b> , <i>Edward</i>	Male	Passenger	✓	–						
<b>Tilley</b> , <i>Elizabeth</i>	Female	Passenger		✓						✓
<b>Tilley</b> , <i>Joan (Hurst)</i> <i>(Rogers)</i>	Female	Passenger	✓	✓						✓
<b>Tilley</b> , <i>John</i>	Male	Passenger	✓	✓				✓		
<b>Tinker</b> , <i>Mrs. Thomas</i>	Female	Passenger	✓	–						
<b>Tinker</b> , <i>son (given name unknown)</i>	Child	Passenger	✓	–						
<b>Tinker</b> , <i>Thomas</i>	Male	Passenger	✓	–						
<b>Trevore</b> , <i>William</i>	Male	Crew	✓	–						
<b>Turner</b> , <i>John</i>	Male	Passenger	✓	–						
<b>Turner</b> , <i>son (given name unknown)</i>	Child	Passenger	✓	–						

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Turner , son (given name unknown)	Child	Passenger	✓	–						
Unknown , Dorothy	Female	Servant		–						
Warren , Richard	Male	Passenger		✓	✓					
White , Peregrine (born on Mayflower)	Child	Passenger		✓			✓			
White , Resolved	Child	Passenger		✓			✓			
White , Susanna (Jackson)	Female	Passenger		✓						✓
White , William	Male	Passenger	✓	✓	✓					
Wilder , Roger	Male	Servant	✓	–						
Williams , Thomas	Male	Passenger	✓	–						
Winslow , Edward	Male	Passenger		✓	✓					
Winslow , Elizabeth (Barker)	Female	Passenger	✓	–						
Winslow , Gilbert	Male	Passenger		–						
<b>102 passengers recorded</b>			<b>49</b>	<b>52</b>	<b>22</b>	<b>1</b>	<b>11</b>	<b>3</b>	<b>1</b>	<b>18</b>

Sources: General Society of Mayflower Descendants; Caleb H. Johnson, *The Mayflower and Her Passengers* (2006); *Mayflower Quarterly*. See Chapter 9 for analysis of the qualifying ancestor recognition process.

## Appendix 12: Full List of Consulted Newspaper Articles

### Authored newspaper articles

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- Astor, Maggie. (2018) Why Many Native Americans Are Angry With Elizabeth Warren. *The New York Times*. 17 October. <https://www.nytimes.com>: accessed 6 July 2021.
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