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MULTIDISCIPLINARY RESEARCH ON FAMILY HISTORIANS

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That part of digital humanities which comprise digital heritage work in archives and libraries is increasingly focused on representation, inclusivity and diversity, viewing public participation as an important resource.[1] Digital heritage initiatives to encourage participation through crowdsourcing, citizen science and educational programmes are designed in part to challenge historical injustices, whether biased narratives or exclusionary collection practices. However, the legacy of authority and exclusion remains to this day. De Groot has argued that family history as it is practised by family historians "troubles the interface between 'amateur', 'user', 'fan', and professional and institutional bodies".[2] Perhaps this is exactly what is needed: something that disrupts the conventional wisdom and established hierarchies in this field. Therefore, in this chapter, we argue that collaboration with family historians holds the potential to advance these efforts.

Family history has long been seen as an "important education tool for teaching a wide public the value of studying and preserving history" precisely because "this interest cuts across ethnic, gender, and age divisions".[3] Erben writes of people's universal need to locate themselves in a wider historical narrative.[4] In recent years, family historians have been included in academic research to explore women's history or to understand the ongoing

impact of colonisation.[5] Family historians have in turn been studied to interrogate the nature of digital heritage use and, in the context of DNA ancestry, the ethics and politics of data privacy.[6] We are thus in a position to illustrate the breadth of family history's impact across disciplines such as history, library and information science, archival science, digital humanities, sociology, media studies and genetics. Our purpose here is to gauge the who, why and how of professional and academic research into family historians who combine personal genealogy and historical interest (not to be confused with the professional historians' study of the family as a social institution, a subject which often appears in a literature search on "family history").[7]

We have applied the methods of a traditional literature review—a scoping review, a state-of-the-art review and a critical review—to answer three questions. Which disciplines show a research interest in family historians? What are the theoretical perspectives and methodological approaches used to study family historians? What is the state of art on family historians regardless of discipline, and how can we build on this in future digital heritage research and practice? The scoping review of the literature answers the first and second questions and, using the initial reading and coding of the literature, provides an analytical framework when identifying the various research perspectives. The third question is answered using the state-of-art and critical reviews of research on family historians. Arguing that the future of digital heritage will rely on such research, we call for a critical discussion of the communicative, ethical, legal and technical issues and how existing and future research expertise about family historians might fill the gaps.

At the outset we believed there was little published research on family historians and their work; however, we soon discovered there was an interest which went back further than we had imagined and there was far more contemporary research—so much that only a small proportion of the literature is specified here, while the full data is available as a Zotero group library.[8] This confirmed our understanding of the research as heterogeneous and disparate; it has no core, no firm definitions and no academic superstructure, despite the longevity of the research interest.

Perspectives across disciplines

In the literature on family historians, several authors have noted the scant academic interest in the subject and the fact that such studies as exist cut across disciplines.[9] Our initial analysis categorised the professional and academic literature into four approaches: the historical approach, the practice approach, the affective approach, and the critical approach. The historical approach spans the literature published in the 1970s and 1980s by librarians and archivists, mainly in the US, who recognised family historians as an important user group. The practice approach gained traction in the early 2000s with a handful of influential papers on family historians' information behaviour by archival and library science researchers. The affective approach is adopted by the literature on the emotions and meanings associated with family history, including studies conducted from a sociological or media studies perspective, which became more frequent in the 2010s. Finally, the critical approach to family history and the organisations that provide access to historical sources can be found in the literature in any period, although its content and aim have changed to mirror larger cultural shifts. It is in this approach that we see a widening research interest in family historians beyond the US–Europe nexus that has dominated for a long time.

The historical approach

The earlier literature discusses family historians as key users of historical sources in archives and libraries. Much of it is written in essay style, framed as an argument. It includes discussions of the issues faced by family historians regarding access to information. In 1971 Gordon examined North American family historians of European descent, who could trace their families back to the nineteenth century with relative ease in local census records but had little chance of tracing them further back in their countries of origin.[10] The solution was later realised collectively by family historians through indexing, transcribing and microfilming historical sources and finally around 2000 digitising them and arranging online access. Much of this work has been facilitated by the Church of Jesus Christ of Latter-day Saints (the Mormons) in the US, first for North America and later for other parts of the world, in particular the UK and Scandinavia.[11]

The reasons for the growing numbers of family historians in the 1970s, particularly in the US, included increased leisure time, a wish for rootedness in response to a more mobile society, the bicentenary of the US Declaration of Independence in 1976 and Alex Haley's novel *Roots* and subsequent television miniseries from 1976 and 1977.[12] The popularity of *Roots* has been taken as inspiring family historians who have African American ancestors and more broadly.[13] Before 1970, critics claimed that family historians often overemphasised North American elites and those who could trace their roots back to American colonial times. This critique has been attributed to the idea that being "self-made" rather than being born into wealth and privilege is an important part of the American narrative.[14] Jacobsen describes a condescending, even antagonistic, attitude on the part of archival institutions, attributing it to a hierarchy between different user groups: "archivists derive more intellectual stimulation and, it must be admitted, ego satisfaction, from helping the historian than the genealogist".[15] Evans notes that while the disdain may linger it is harder to document, which our experience supports.[16] Rhoads instead argues that family historians contribute to the advancement of academic research in fields such as history and sociology and is positive about the increasing use of the archives: "The records were always there, but now, thanks in part to the influence of family history, they are being used far more, and as an archivist, I am pleased to see that development".[17]

Ashton illustrates this with the success of the Allen County Public Library in Fort Wayne, Indiana, which even in the early 1960s—when there was no great public interest or support—tirelessly built a family history collection of national scope, leading both locals and out-of-towners to flock to the library, in a vital boost for a small town with little else to attract tourists.[18] Sinko and Peters, based at the Newberry Library in Chicago, conducted the first known study of family historians as users of library services, asking "Who are the people doing genealogical research in libraries today?"[19] Their findings challenged stereotypes of the family historian as a "little old lady in tennis shoes". They found that family historians were highly independent but infrequent users of the library who generally wished to make better use of the library's collections. Most importantly, they argued that family historians as users of the library should be treated as individuals rather than a homogenous mass.

While the literature we found is focused on family historians using archives and libraries in North America, it has also been a subject of interest around the world. This, though, is where the lack of a core research field becomes clear. A good example of this is Boyns, who, in the late 1990s, argued for the importance of family historians as a user group from the

perspective of UK archives.[20] Like many others, Boyns regrets the lack of research and discussion in archival literature, seemingly unaware of the existing body of earlier literature.

The practice approach

The increasing popularity of family history, leading to growing numbers of archive and library users, was never understood as a solely positive development from an institutional perspective. Instead, the institutions seemed to find themselves caught between servicing two distinct groups: the professional historians on the one hand and the amateur family historians on the other. While this discourse may be less pronounced today, even with the focus on users and participation there is a supposed reluctance to engage with an ever-expanding group of people who are neither "real historians" nor an exciting new user group. This is despite the fact they are some of the best defined users of archives and libraries. They are early adopters of technology, from databases and web forums to DNA analysis, and "can serve as a valuable and innovative partner for advocacy and technological advancement of the field" of digital humanities.[21] In understanding their practices and information behaviour there are still many important lessons to be learned.

Using surveys, interviews and observations, researchers in archival and library science have studied family historians' information behaviour, usually in user studies or information-seeking behaviour studies.[22] The cyclical pattern of their information behaviour has been established in several seminal studies. Duff and Johnson find that their research is iterative, with different strategies applied to find information and a preference for informal networks and sources of information.[23] Yakel notes a continuous pattern of varied information behaviour, including information management which leads to a wider connection with the past and understanding of one's own life.[24] Friday develops these ideas into a circular model of family historian's online research behaviour, including various actions, strategies and outcomes that have no fixed beginning or end.[25] Roued et al. have used this cyclical pattern to model family historians' engagement with a range of digital platforms.[26]

Family history practices are among the greatest drivers to digitise and transcribe historical records held by research institutions, libraries and archives, both collaboratively and independently. Family historians were organising their own crowdsourcing projects, big and small, long before the concept of crowdsourcing became popular in digital cultural heritage.[27] While family history communities used to be centred on societies, newsletters and mail, most of these activities have moved online and continue to grow.[28] From message boards to social media, family historians ask and answer questions with great enthusiasm, helping one another in a spirit of reciprocity.[29] What they share has changed with the growing availability of data online, though. Where answers once focused on guiding the questioner to historical sources, questions are increasingly answered with a link or a copy of the data in question.[30]

The affective approach

Family history centres on kinship, which has long been studied from anthropological and sociological perspectives, using interviews and observations to draw up genealogical charts and understand how kinship systems operate in different cultures. Kinship and close relations invoke fundamental ideas about personal and collective identities and experiences, and thus, family history can prompt a range of emotions.[31] While some family historians pursue it "just for fun", for others it arouses intense feelings. De Groot points to the affective power

of discovering new relatives and the enjoyment of historical detective work.[32] Yakel similarly emphasises the emotional resonances as crucial in family history.[33] Emotional responses vary according to the time and context. Contemporary family historians are often happy to find convicts in their family tree since mug shots provide portraits lacking for other, law-abiding ancestors—just one example of how a sociocultural turn can impact how family historians approach the past. According to Evans, family history before the 1970s was "social aspiration around heredity and wealth", but now is more about "bringing the lives of the marginalised to the fore, challenging stories about the stability of nuclear family life, and women's lives more broadly".[34] Barnwell's study on the negotiation of family histories in postcolonial societies through keeping or revealing family secrets shows how changes in what constitutes stigma and shame can affect families' stories over time.[35]

The enthusiasm with which many family historians search for their ancestors has been variously called a passion, an obsession and a bug.[36] Several researchers mention the search for identity, authenticity and sense of belonging as driving family historians.[37] Shaw, however, labels these reasons "outward looking" while the respondents in her study of Australian family historians instead looked inward and "appeared to be interested mainly in the micro-historical narratives of the past as they pertained to their own individual familial stories".[38] Basu finds spiritual and imaginative parts of family history in a study of "roots tourism" in the Scottish diaspora, arguing that it becomes a way to recover a sense of home and to close perceived gaps regarding place, ancestry and territorial attachment.[39] Edwards draws on examples from England to argue that family history is a way of caring for the dead and for the living, and that it has spiritual connotations like religion.[40] Serendipity—finding information by chance—is remarked on by many family historians, framed as divine guidance, intuition or plain luck.

Emphasising revelation and self-reflection as essential to family historians, Saar says that an important purpose is that they will be "provoked and shocked, struck by the lightning of instantaneous insight into what they are, how they have become and what they might not want to be".[41] This resonates with Kramer's study of the popular British documentary series *Who Do You Think You Are*, which highlights a transformative dimension where celebrities are moved and changed by what they learn about their family background.[42] The revelatory element is seen in other television programmes around the world, where people learn more about their ancestry, and in DNA testing companies' commercials where subjects are (happily) surprised by their results.[43] However, not all surprises are as welcome. Discovering you are not biologically related to someone in your family or that you have half-siblings you did not know about can severely complicate the boundary work—what Wahlström Henriksson and Goedecke describe as "practices and discursive processes that establish boundaries between relationships that are close and those that are not"—which is necessary for all family historians.[44] The family historian's boundary work entails choosing who to include and exclude from the family tree, who to regard as "true", "real" or "blood" relatives and is the basis of an identity exploration which can invoke difficult emotions when ancestors are found to have unexpected cultural backgrounds or where ancestors had unequal levels of power.

The critical approach

The critical approach in the early literature held family historians to be problematic users of archives and libraries, being too numerous and generally inferior to professional historians. While that exclusionary attitude lingers on today, the more recent literature shows that family

history can be problematised through the lens of power, ethnicity or gender, rendering insights valuable to digital heritage.

The advent of genetic testing and DNA analysis as tools for family historians has thus spurred scholarly interest in the ideas, practices and dilemmas of ethics, privacy and commercialism. Direct-to-consumer genetic testing (DTCGT), meaning products that consumers can buy over the counter or online, has arguably transformed family history by enabling genetic genealogy.[45] Yet while DNA is often described as objective evidence and an authoritative source of knowledge that extends far beyond the resources found in "traditional" archives, Hackstaff warns against its uncritical adoption, though adding that experienced family historians are aware of these limitations and are careful to triangulate data, often requiring three reliable sources to verify their relationships.[46] Further, DTCGT companies have been criticised for treating minority groups' genetic material as a commodity, disregarding indigenous people's ancestral claims and their right to regulate genomics research.[47] This aligns with a growing societal awareness related to postcolonialism, which can also be seen in demands to return heritage artefacts to their rightful owners and to curate exhibitions respectful of human dignity.

Both contemporary and more traditional forms of family history are imbued with socio-cultural norms, such as the nuclear family ideal.[48] This is shown by the conventions for how to draw up a family tree, which extends into developing digital tools that continue to shape and reshape our perceptions of reality.[49] De Groot warns that family history can become a vehicle for imposing a profoundly Western mode of historical knowledge onto other cultures.[50] Yet equally there is a potential wealth of counter-histories to illuminate the lives and experiences of marginalised people.[51] Sleeter speaks of "critical family history", drawing attention to the impact of racism and other social structures on families' experiences, while arguing that regrettably most family historians do not focus on the social context in which their family lived and miss the opportunity to ask critical questions.[52]

This way of narrating family histories extends to popular family history as well. Scodari examines several family history productions for television and finds them biased towards decontextualised family narratives that are notably post-class, post-racist and post-feminist, accentuating individual transcendence rather than collective struggle.[53] Hackstaff writes that the organisation of many genealogical societies—along racial, ethnic or national lines—effectively precludes them from counteracting exclusionary categories, but that when family historians pursue leads and discover previously unknown ethnicities in their family tree, categories can be destabilised.[54] Thus, family history holds the potential to challenge social relationships affected by colonisation, racism and other power relations and silenced or suppressed national narratives can emerge in family history, showing how injustices live on and impact descendants' social situation today.

Discussion

We would argue that disrupting conventional wisdom and established hierarchies can help circumvent the legacy of historical injustices that continue to trouble digital heritage. One way is to revisit the professional roles and strategies of the institutions concerned.[55] Another is to communicate in a different way with the many stakeholders, acknowledging and drawing on the expertise of people with the relevant education (professionals) and those with a passion for history (amateurs). As Redmann says, "if both archivists and genealogists recognize that they can learn from one another, the future may see their relationship moving from uneasy

peace to active partnership".[56] We hold that state-of-art research on family historians can inform solutions to current issues in digital heritage—issues that include collection practices which are considerate to future generations, the development of sustainable digital tools and platforms, crowdsourced digitisation and transcription, the negotiation of conflicting heritage and the legal and ethical management of copyright and data protection.

Collection practices

Beginning with collection practices, we find family historians to be a useful approximation of future user needs. Before the advent of the digital humanities and data analyses capable of wrangling large-scale census data into macro-historical understandings, family historians had to access full datasets of whole populations to find the material for their micro-histories.[57] It has always been the search for their own ancestors that is the driver for the collection and sharing of heritage data, and later its digitisation, too. Family historians can also be credited with the collection, preservation and use of historical sources for marginalised narratives.[58] They have seen the relevance of otherwise forgotten histories which they have preserved because of their family connections. The result of a family history association casting a spotlight on some topic can be primary sources retained safely in the hands of those who needed no other reason than a family connection. One such example is all the material from the No Gun Ri massacre in South Korea in 1950. The Chung family collected stories and sources and kept them for nearly 50 years until the world and South Korea were finally ready to take notice. Their collection is today the basis of the No Gun Ri Museum.[59]

Development of digital platforms

Studies of information behaviour among family historians, based on interviews, observations and surveys, are valuable insights into the vibrant networks of people who manage and use heritage platforms.[60] If resources are an issue at a particular institution, which they invariably seem to be, it could increase collaboration, in the digitising and storing of heritage sources and artefacts, with those who value and cherish them because of their family connection. Sparse institutional resources could equip family historians for this work and provide the platforms where the digitised knowledge and sources could be shared freely. By extension, it would be possible to use the same methods from research on information-seeking practices to examine in greater depth how family historians might use specific digital tools and platforms, whether at the development stage or to make existing systems more useful and sustainable.

Digitisation and crowdsourcing

We would argue that no group has contributed more to the digitisation, transcription and sharing of historical sources than family historians. Across the world they have microfilmed and scanned, indexed, published and shared resources going back many centuries.[61] Their motivation has always been twofold. First, it has been to their own direct benefit. In a pre-digital age, lack of access was a major obstacle in the path of any family historian whose ancestors had not stayed in one place.[62] Access to searchable records in any form, starting with microfilm copies and today online, opens immense possibilities for the individual family historian.

Yet every family historian knows that their own efforts can only take them so far. They depend on the work and aid of other family historians. Thus, their second reason is to help others gain access to records local to them. The family history community is one which expects favours and reciprocity from its members—the studies of message boards and social media make that plain.[63] This is important to understand when planning crowdsourcing projects, where it can sometimes be difficult to gather participants. Gamification and appeals to volunteers' better nature go only so far. Yet the largest, longest running crowdsourced projects have been run by family historians themselves, with little or no support from repositories or universities. Family historians have themselves built both for-profit and nonprofit platforms to share these efforts. The largest for-profit platforms include Ancestry, MyHeritage and FamilyTreeDNA; the long-running nonprofit platform based on the Mormons' family history efforts, FamilySearch, is also very visible. And alongside them are thousands of small, local platforms and tools, each of them valued and used by loyal family historians every day. When asked which platforms they used, 72 per cent of Danish family historians who responded said they use one or more from a category of smaller platforms.[64] An integral part of family history is identifying a variety of platforms for a detective-like search for information to add to their family narrative. The risk posed by online tools that family historians will overlook rich local resources is reason enough for the established heritage institutions to revisit their role and their unique collections to work more with outreach.[65] They need to know who uses which given platform and why, and in conjunction with which other platforms, so they do not do something that others have done better—or that no one needs.

Conflicting heritage

Another challenge for GLAMs in general is how best to negotiate conflicting heritage in the form of majority and minority narratives. Postcolonial themes challenge institutions to communicate not only their collections but also the origins of those collections. Mainstream historical narratives can be one-sided, but there are many micro-historical narratives which come to light through family history. Family historians continually use boundary work to determine which part of their family tree they will focus on and which not.[66] By interviewing family historians whose ancestors were connected to the narrative an institution wants to communicate, it would be possible to stress-test its public reception. Family historians can help orient the institution about the emotions and dilemmas presented by a potentially difficult subject, preparing it to deal with any backlash.[67] Family historians are well versed in negotiating conflicting and conflicted narratives in relation to their own family and the rest of society.[68]

Legal and ethical challenges

Finally, family historians' practices illustrate the importance of balancing the right to be forgotten—data protection in a legal sense—with the right to be remembered.[69] In family history, everyone's micro-history is important and should be remembered; everyone has a place in history, both the living and the dead; every story is potentially important to someone, even if it is "only" one's immediate family. The complex community of family historians, which privileges information management and sharing, illustrates an important point. Where GLAMs may take a cautious approach to privacy, copyright and data protection, family historians typically take a more practical approach, even though they also value privacy.[70]

Family history necessarily involves sharing personal identifying information about the dead or working with documents and imagery that are potentially under copyright. Without it there would be no family history. Family historians know all too well that the greatest risk to their ancestors is being forgotten.[71] Instead, they keep them alive through remembrance, communicating their stories in different ways. The institutions involved in the OpenGLAM movement, which works for ethical open access to cultural heritage, know the difficulties of navigating a legal system that rarely considers the needs of the heritage sector.[72] Here perhaps there is much to be gained by reaching out to local family historians and seeking their advocacy to help encourage legislators to consider heritage perspectives.[73]

Conclusion

In reviewing the professional and academic literature from a cross-section of disciplines such as history, sociology and information science, on the essence of family historians, we identify four approaches with which to frame a literature review: the historical approach; the practice approach; the affective approach; and the critical approach. While family historians are longstanding users of archives and libraries as well as established fans of history, there is still a sharp distinction between amateur and professional historians. We find that the literature offers a continuum of arguments for family historians as a vital part of the digital heritage practices found in the combined ecosystem of libraries, archives and the digital humanities. Going back to the 1970s, there were professionals and academics who saw a great potential for collaboration, but this has yet to be realised on a significant scale, while acknowledging family historians' skills, knowledge and motivations. We may have identified more literature than we expected, but research on family historians is still in its infancy. Digital heritage can only benefit from more research on family historians, especially when it comes to collection practices, the development of digital tools and platforms, digitisation and transcription, negotiating conflicting heritage and the question of copyright and data protection. The potential exists for worthwhile research and the establishment of an interdisciplinary field focusing on family historians.

Notes

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