

It's

LEGENDARY

Use these 12 key principles
to separate fact from
fiction in your family's
cherished legends.

BY DANIEL RUBY

MY BROTHER WALTER DID what genealogists often call a “happy dance” when he figured out the connection between our great-grandfather and a renowned 19th-century Russian rabbi.

He was at Yeshiva University’s research library in New York <www.yu.edu/libraries>, boning up on the life and teachings of Rabbi Isaac Elchanan Spektor. Spektor was the chief rabbi in Kovno, Russia (now Kaunas, Lithuania), for whom Yeshiva’s theological seminary is named. Walter had recently written a family history narrative, which included the legend that our ancestor Joseph Rabinowitz was related in some way to the great rabbi. Now, for an article in a New York Jewish weekly, Walter was preparing to retrace Spektor’s steps on a roots journey to Kaunas and surrounding districts.

Paging through a primary English-language source on Spektor, Walter sat up when he read a biographical detail he hadn’t seen elsewhere. According to the author, Spektor had a grandson Joseph Rabinowitz, who’d lived with and studied under him in Kovno in 1874. That was the year before our pious ancestor of the same name and age arrived from the Russian Pale to begin a new life in New York.

The text explained that Joseph came under Spektor’s care after the sudden death of his father, Spektor’s first son Chaim Rabinowitz. (Spektor’s children used the surname Rabinowitz, “son of the rabbi.”) Joseph studied with the rabbi “until he became highly proficient in Talmud and Jewish codes.” Walter conjectured that the rabbi made arrangements for his marriage and then sent him off to America as a sort of emissary.

This became the premise of Walter’s rollicking account of his adventures, published in 2008. Our family legend was now in the public record, fleshed out with colorful detail and sweeping reflections.

And it was wrong. Several years later, after an extensive search for our ancestor’s very common name in New York City vital records, I found the 1917 death certificate for our Joseph Rabinowitz. His father’s name was Abraham, not Chaim (or Aryeh, the formal name of Spektor’s son).

This discrepancy, combined with doubts about the plausibility of the emissary theory—given that Joseph Rabinowitz wasn’t among Spektor’s American followers who founded the seminary—pointed to a disappointing conclusion: Our great-grandfather was not, in fact, the grandson of Rabbi Spektor.

That hard lesson demonstrates how difficult it can be to discover the truth behind closely held family legends. That cherished family story your grandma swears by probably has a seed of truth, but is most likely distorted to some degree. Use these 12 investigative techniques to separate fact from fiction in your own family legends.

Hyperbole happens

Sometimes intuition fails us. Natural storytellers like my brother are subject to a particular bias; they want the story to be concise, coherent and exciting. In service of a good yarn, they may make too much of a certain detail or overlook contradictory evidence. This narrative bias is just part of the problem. If a story can go wrong on any single telling of it, how reliable can it be after it’s passed down through generations?

Experts have a name for this phenomenon: retrospective falsification. Skeptics Dictionary website <www.skeptdic.com> creator and author Robert Todd Carroll counts it among 59 biases and logical fallacies that can beset the unwary.

“Stories get distorted and falsified over time by retelling with embellishments, including speculations, conflating events, and incorporation of material without regard for accuracy or plausibility. ... The distorted and false version becomes a memory and record of a remarkable tale,” Carroll writes.

Embellishment of family legends isn’t always accidental. A big motivation for mistaken legends is a desire for family aggrandizement, as I’ve learned since becoming a minor expert on Rabbi Spektor.

No fewer than nine other family researchers have contacted me about their links to the rabbi. Only two of those claims had merit. Deeper investigation revealed a more plausible, though still-unproven, explanation for my family’s fabled connections to the rabbi: that the mother of our Joseph Rabinowitz was related to Spektor’s wife. That would be a less impressive relationship, but still one with some cachet among Jewish American immigrants.

Such “castle-building” is hardly unique to any one group. In a classic case described by Milton Rubincam in *Pitfalls in Genealogical Research* (Ancestry), a family fraudulently asserted a genealogy claim in scholarly publications in 1908 to qualify for eligibility in the General Society of *Mayflower*



TIP: Creating a map, family tree or ancestor timeline that shows your data can help you spot conflicting information, such as an ancestor in two places at the same time.

Descendants <www.themayflowersociety.com>. Years later, when the claim was questioned, the society instituted a project to reinvestigate all *Mayflower* families and adjudicate contested cases.

On top of all the reasons family stories go wrong, now add the ability of the internet and social media to disseminate erroneous information far and wide. Online family trees at sites such as Ancestry.com <ancestry.com> are famous for containing names, dates and relationships copied—errors and all—from other trees. Urban legend chronicler Snopes.com <www.snopes.com> tracks memes that have propagated on the internet without regard to accuracy. One is an oft-recycled legend about some prominent politician (the name varies) whose ancestor was hanged as a horse thief.

With so many opportunities for error, either accidental or deliberate, every family legend gets distorted to a different degree. You have to dig into records to learn where on the scale—from substantially true to flat-out fictitious—your legend lies. Most likely, it’s somewhere in between.

Investigative tactics

What’s an honest and diligent genealogist to do? How are we to evaluate claims, pick out the nuggets of truth, and shed the embellishments and outright fictions? How do we use our abilities not just to puncture sacred cows, but also to honor the legend by discovering its heart and writing its history?

Your mission as a genealogy investigator is to seek the truth, to describe the reality of past circumstances to illuminate the lives of your ancestors and you. It does no good to perpetuate stories and legends that are untrue or misleading.

We investigate genealogy mysteries using the same critical thinking skills used in any field that seeks to discover the truth from a set of facts. The experimental scientist, investigative journalist, diagnostic doctor, homicide detective, and you all face the same challenge: to make sense of partial information and arrive at a logical explanation that fits the evidence.

“The most distinctive features of the critical thinker’s attitude are open-mindedness and skepticism,” Carroll writes in *Becoming a Critical Thinker* (Pearson Learning

Solutions). “These characteristics may seem contradictory rather than complementary. On the one hand, a critical thinker is expected to consider viewpoints different from his or her own. On the other hand, a critical thinker is expected to recognize which claims do not merit investigation.”

In genealogy, the scientific method is encapsulated in the Genealogical Proof Standard <www.bcgcertification.org/resources/standard.html>, which specifies a five-element methodology for establishing proof. The Board for Certification of Genealogists has distilled the field’s best practices for determining accuracy into a comprehensive standards manual called *Genealogy Standards: 50th Anniversary Edition* (Ancestry).

The recently published *Mastering Genealogical Proof* by Thomas W. Jones (National Genealogical Society) offers a program for learning and practicing exemplary research methods. Jones describes the research reasoning process as comprising five phases that correspond to the proof standard elements: framing a question, gathering evidence, testing hypotheses, establishing conclusions, and documenting proof. These guidelines will help you follow that process.

1 Understand three types of errors.

Family stories become inflated and error-ridden due to three factors

- **OBSERVER BIAS:** All investigators have points of view, cultural touchstones and belief systems that color their interpretation of evidence. A fair researcher must be aware of biases and tendencies as a first step to correcting for them. Bias affects all stages of the research cycle—from posing the question to selecting sources, interpreting evidence and writing the results.
- **EXPERIMENTAL EFFECTS:** The mechanics of memory are such that retellings of an experience get mixed up with memories of the actual experience. And you might hear a story so often you begin to believe you were there. It can become difficult to know if something is a true memory, a received recollection or an imaginary confabulation.

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■ **LOGICAL FALLACIES:** Researchers are prone to mistaken reasoning. To stay out of trouble, don't get stuck on your first impression of what happened, or place too much weight on the last thing you learned. Don't automatically discount contradictory evidence or ignore less likely possibilities. Avoid assuming two phenomena that happened at the same time and/or place are related. Most important, don't allow your desired outcome to influence your interpretation of the facts.

2 Recognize common genealogical myths.

One important skill is the ability to quickly identify false clues and blind alleys. There's no use spending time on a story likely to be wrong (unless you've ruled out every more probable explanation). Certain legends are so common and so often regurgitated that a skeptical genealogist should be able to recognize them right away: The three brothers who immigrated and parted ways, one north, one west and one east; a relation to a Cherokee princess (the Cherokee didn't have royalty); an Ellis Island official changing an immigrant's name (this didn't happen); a lost family fortune; and a family crest are common apocryphal tales.

3 Be skeptical of famous ancestor claims.

A lot of people do have famous relatives. Many more imagine that they do. Mistaken celebrity connections are so common that it's wise to assume a kinship claim is wrong until proven otherwise. To prove such a claim, you'll need to trace both the famous family tree and your family tree to find a person common to both.

Beware the seductive surname. Names, even seemingly unusual ones, of folks who lived at the same place and time can be coincidence.

The availability of family trees on the internet makes a tempting target for finding famous ancestors. While these projects can serve as a gold mine of suggested relatives, they're not independently verified. Don't trust any family tree data you encounter online unless sources are provided and you've checked those sources. Steer clear of automated "famous relative finders" you sometimes see promoted on genealogy sites. These tools draw on various family tree sites to return search results—often, incorrect—showing distant family connections to historical figures.

4 Use lore as the basis of research questions.

Though oral traditions and family legends are known to be highly unreliable, don't disregard them. They may be the best starting point for your investigation. Because most stories contain at least a grain of truth, your goal should be to determine which parts of a legend bear further investigation. Begin by restating the legend as succinctly as possible. Break

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down complex legends into separate facts or assertions. Next, frame research questions you can test through research in historical records. As you're able to prove or disprove narrow claims, you can broaden the questions you're researching.

5 Gain historical expertise.

Since you're seeking to connect a historical event to a particular family history, you need to become an expert in that event and in your family's history. Learn all the facts about the people and events that figure in your legend. If there's a famous person involved, you'll find a wealth of material. Learn social history your family experienced: not just the historical events, but the cultural and economic factors that drove their decisions. Read local history books, especially those published close to the time the ancestors in question were alive, and examine maps and photos from the era to learn what their environment was like.

6 Consult old records.

When you find information in an online tree or index, or a relative passes on a family claim to fame, research the claims yourself in genealogical records before you consider them as the truth. Even original records such as death certificates and court records can contain errors introduced by the person who reported a death to a clerk, or by a clerk who copied a will into county record books. To guard against such errors, obtain original records instead of relying on indexed or transcribed information, and look for multiple sources for a birth, marriage or other event. Keep careful track of where you found each piece of information by citing the source, which will help you evaluate the reliability of that source (see No. 7) and revisit it as you draw conclusions and document your results (see Nos. 10 and 11).

7 Consider the reliability of your sources.

Don't accept a source of family information as trustworthy until you corroborate it with other sources and your own analysis. Know the difference between primary

Real Investigations of Family Tree Tales

Some family legends have more basis in reality than others. These three researchers investigated family legends and discovered varying degrees of truth—and falsehoods—behind them.

Civil War Swordplay

As the 150th anniversary of the Civil War Battle of Gettysburg approached last year, Frederick, Md., resident Marcia Hahn shared her family heirloom—a Confederate cavalry officer's sword that had belonged to her ancestor—as part of a local Civil War program. According to family legend, the ancestor was a horseman and Southern officer who suffered an eye injury at Gettysburg.

But Hahn's further research led to military pension records showing her ancestor was actually an enlisted infantryman on the Union side. He'd probably scavenged the sword as a battlefield memento. The eye injury happened, but months after the Battle of Gettysburg. "My quest to discover the story of my Civil War ancestor proved to be a fascinating journey," Hahn told a *Frederick News-Post* reporter. "Along the way, I unwittingly refuted almost every element of the story as it had been told for generations." But her search revealed additional enlightening details about her ancestor and his service.

Prisoner Parable

Australian genealogist Lindsay Swadling set out to document an elderly relative's story, passed down by word of mouth for 160 years, about an ancestor's role in the colonial history of New South Wales. The man was supposedly killed during an expedition with the colonial governor. His widow then received a land grant and his son, an appointment as a shipwright.

Swadling found bits of evidence in birth, death and marriage records; censuses; muster rolls; probate records; newspapers; and other sources. She was able to show the story was largely true, and even to reconstruct a more-accurate version. In 1815, the ancestor had been part of a road-building crew in the bush country and had not returned from an encounter with natives. Later his widow accepted the gift of a cow on his behalf, in recognition of his service. She also received a small monetary award from a police fund. One of her children later applied for a shipwright's apprenticeship with the governor's office.

"We are told that family legends are unreliable, as they can in fact be. The lesson I have learned is that such stories should not be discarded without investigation—there may be more than a grain of truth in them," Swadling concludes in a recounting of her search

at freepages.genealogy.rootsweb.ancestry.com/~swadling/famhist/legends.htm.

Exaggerated Adventures

Most often, a family history investigation will reveal at least some basis in truth, but with many distortions, as in Portland, Ore., genealogist Connie Lenzen's study of an Idaho settler family. Contrary to three separate accounts published in a 1992 heritage book covering a Missouri county, the George W. Jackson who came to Idaho from Missouri in 1862 didn't strike it rich as a gold miner. Lenzen's research revealed that after several failed mining ventures, Jackson left Idaho in 1870 but returned years later to support his family as a butcher and small-time rancher.

Several other points referenced in the heritage book—a divorce, a blizzard rescue—turned out to be inaccurate when fact-checked against other sources. "Traditions are one of the oldest sources of family history and one of the least reliable," Lenzen cautions. She adds that the accounts in this and other heritage books she examined display "typical errors and discrepancies—descent from famous people, conflicting and incomplete lists of children, and erroneous citation of birth order."

and secondary sources. Consider how the reporter of a fact acquired his information: whether by firsthand observation (primary) or secondhand hearsay (secondary). Also take into account how long after an event a record was created or published. For example, someone's birth recorded in a city register a day or two later is more reliable than the same person's death certificate stating his birth date.

In evaluating eyewitness testimony, keep in mind the observer may have made an error, or his recollection of the event may have changed over time. In her study of a pioneer whose exploits are described in local history books (see the box above), genealogist Connie Lenzen shows that such sources, which might on the surface seem credible, can be unreliable. Look for sources of the information presented and thoughtful explanations for any conclusions drawn.

Consider the qualifications, reputation and motivation of those reporting on family stories. Would they have reason to mislead? Prominent families often paid for inclusion in local biographical collections, presenting opportunities for their accomplishments to be exaggerated. Or your great-grandfather, who loved a good story, may have invented his relative's Civil War injury for the entertainment value.

8 Use visualizations to illuminate the facts.

Historical records are known for containing incorrect name spellings and inconsistent ages, such as the grandma who got two years younger from one decennial census to the next. But some discrepancies are bigger: Maybe the city directory, for example, reported that your third-



TIP: Use family stories and other researchers' online trees as clues to help you form theories about when and where your ancestors lived. Then research what types of records will help you test your theories.

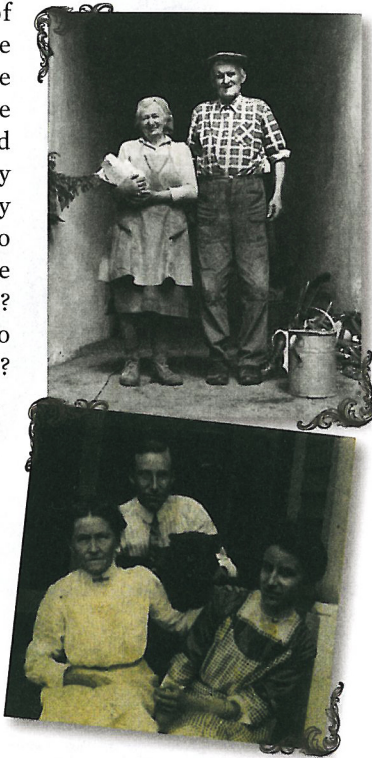
great-grandfather was in Philadelphia, but the family story says he was digging for gold in California.

Making maps, family trees and ancestor timelines can help you visualize the data and spot such conflicts. Chronology is particularly useful in reconstructing migrations, tracing individuals' movements in space and time.

When you find conflicting information, try to reconcile it by consulting more sources. Two or more independent accounts that agree on a point will increase your confidence in the accuracy of the information. It's not enough to determine that one version is wrong; you should also understand why it's wrong. If you can make an accurate explanation of how an incorrect legend came into being, you'll go a long way toward debunking it.

9 Trace artifacts' origins.

Artifacts are sometimes the subject of family legends, such as the silver bowl said to have once been in the White House. Work to understand the provenance of any artifacts your family is lucky enough to possess. Who owned the object before you (or your relative)? How did it come into that person's possession? Does it appear in any old photos? Ascertain that the object is authentic, with the help of an antiques appraiser if necessary. Trace manufacturer's marks to determine its origin. Look for documentation that shows its connection to the family.



10 Connect facts in context to draw conclusions.

Once you've established the reliability of your facts, you're in a position to draw valid conclusions. Now is the time to use intuition, even reasonable speculation, as you interpret the data. Link facts together and place them in the context of the places and times your ancestors lived. Let the conclusions emerge from the facts, not the other way around.

You may or may not find a smoking gun, a critical bit of evidence that points conclusively to one interpretation and reveals your family legend as true or false. Unresolved

questions are to be expected, setting the stage for future research by yourself or others.

11 Summarize your results.

The last phase of the proof standard is to summarize your results in a writeup or some other form. This doesn't mean you have to author a footnoted academic paper. You can share family stories in a more informal way on a website or blog, or in written essays, photo albums and myriad other formats. However you present your findings, be sure to give source information for the key facts and explain your reasoning (find easy-to-use help with this in *Family Tree Magazine's* Source Citation Cheat Sheet <shopfamilytree.com/genealogy-source-citation-cheat-sheet>). If you do want to publish your research in a formal journal, follow the publisher's guidelines for citing the sources you used.

Even if you didn't answer all your questions about your legend, go ahead and write about it—just identify it as “legend” or “lore” and acknowledge that it's unproven. And be prepared to revise your presentation when new evidence comes to light.

12 Honor your family legend.

True or false, the legend and its retelling over the years is part of your family history. Honor this by placing the story in the larger historical context. Tell it with as much color, style and panache as you dare, but always be sure to stay true to the facts. Tell the story of the story: How did the myth come to be? If parts of the story are ongoing mysteries, identify what facts are known and what is conjecture. Your scientific approach may offend some in your family who want to cling to cherished mythologies, so be prepared for pushback.

Whether your research ends up bearing out or debunking the family legend, or somewhere in between, you will have performed a blessing—a mitzvah, Rabbi Spektor would say—for future generations seeking to know their ancestors' true experiences. By enabling a rich new understanding of the facts, you will have succeeded in transforming the stuff of legend into the stuff of history. ■

Journalist and genealogy investigator **DANIEL RUBY**, of Oakland, Calif., blogs about his research at Family History Machine <www.familyhistorymachine.com>.