PREPARING THE STUDENT FOR A PROFESSIONAL CAREER IN
GENEALOGICAL RESEARCH: AN AMERICAN EDUCATIONAL VENTURE

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This paper focuses on management perspectives of the creation of a distance learning higher education institution, from the preparation and planning to the implementation of curriculum and writing the syllabi, to faculty and creating a governance body of the Academic Council.

Introduction

The creation of a unique school of genealogy and documentary sciences in the United States was envisaged in 2008 in response to the burgeoning interest in studies in genealogy (Blount, 2009) with the overall mission to fill four voids which were currently neither addressed nor implemented in the existent educational programmes available for American genealogy students. These areas of need were the priority issues addressed in the creation of this certificate and postgraduate secondary school, i.e.

• to place the field of genealogical studies within its historical context with heraldry;
• to merge the genealogical courses within the related disciplinary fields of the human sciences;
• to begin an ongoing research and development programme in the field of genealogy; and
• to obtain accreditation for the individual programmes (courses).

The Documentary Sciences department of the new School was created to reflect the programmes as presented at L’Università degli Studi di Torino and Scuola di Genealogia, Araldica e Scienze Documentarie in Italy in that it provides theoretical, methodological and applied tools needed to evaluate and achieve a scientific presence for genealogy study. It is necessary to create a research and theory development programme in order to fulfill a requirement in the lifting of genealogy to a scientific field of study (Liles et al., 2010) into higher education.

The American brand of genealogical training to date had not embraced the broader perception of the European model of educational programmes in the genealogical studies that emanated from genealogy’s related disciplines. Nor had it preserved the historical context of the Middle Ages grounded in European chivalry. In addition, the beginnings of genealogy that developed through the heraldry of the Middle Ages were not addressed with the exception of the excellent and scholarly book by Jean Stephenson, Heraldry for the American Genealogist (1959). Simply put, conferences, round table meetings, advertisements and programmes of genealogical study in the States ignored heraldry as a potential progenitor for the educational study of ancestors and family history.

A short-term goal was implemented relating to the immediate accreditation of the school’s basic certificate programme in order to establish credibility amongst the general public and potential pupils. The Certificate Programme (course), entitled The Basics of Applied Genealogy was accredited by the College of Teachers in June 2011 for a three-year duration. The Postgraduate Diploma in Genealogy, Heraldry and Documentary Sciences is now up for accreditation review by The College.

Historical dimensions of the educational programmes

Placing the field of genealogy into its historical context of heraldry required a truly didactic base from which to display the educational rationale for an addition to the highly technical field of genealogy, which currently exists in the States. To that end it was necessary to write about the relationship between heraldry and genealogy for the general audience. However we must remember that heraldry is also American as the early settlers from Britain brought their arms to the new world. These early armorial bearings in churches and historical buildings and seals, porcelain and silver remind us of the use of arms in early America (College of Arms Foundation, Inc. Website).

Heralds

It was during the latter part of the 12th century that members of the nobility began to place devices upon their shields, which were of their families. In a matter of time other images began to appear on seals. During the Middle Ages the shields became the family identification. The shields and devices were then the image of heraldry (Slater, 2002).

The Herald historically was the person who brought news and announcements to the people from the King. However, during the Middle Ages as chivalry grew so did the duties and prestige of office of the Herald. The heralds instituted many social laws and the honours and privileges granted to warriors and statesmen were preserved for their descendants. These exceptional men were responsible for scheduling and coordinating tournaments and they also made visitations to various provinces to be assured that those bearing arms had the privilege to do so (Zieber, 1977). In honour of these heralds, the School is in the process of creating the Vicente de Cadenas y Vicent Chair of Heraldry which is taught by Assistant Professor John James Tunesi of Liongam. The late Vicente de Cadenas y Vicent was
Cronista Rey de Armas (‘Chronicle King of Arms’) of the Kingdom of Spain.

One of the School’s objectives was to provide enlightening material about heraldry and genealogy with the goal of informing those who did not have any knowledge about heraldic art or design. Data about heraldry and its relationship to genealogy was placed on the School website for all students and the public. The administration also created a forum page, a Skype online discussion group and a bi-annual journal. Each of these vinnés aided the driven and passionate of the students. The School is also involved in working with several heraldic and genealogical societies in Central Europe to provide assistance in recording oral genealogical and cultural heritages.

**Genealogical Theory**

It is important to emphasise that theory and practice are necessary to be a professional genealogist. Jaussi & Chaston (1972, p. 3) state that 

“[g]enealogical research is the method used to identify individuals from the recorded events and to establish their relationships in families.” However, it should be much more, as it should include the significant space-time relation that is shown in historical and anthropological theories.

All disciplinary fields of studies demand an undergirding theoretical basis. Curriculum-based instruction on allied fields of genealogy was an integrative link to the programme. The related fields of the human and social sciences as well as judicial and administrative rules and precedents are some of the areas known as associated fields of genealogy.

Creating a strong theory-building programme in genealogy was constructed into the School’s platform in its Qualitative and Quantitative Research sections (i.e. the Research Module). A special focus was placed on grounded theory as appropriate for a generic qualitative approach to genealogical theory building (Glaser and Strauss, 1967). Glaser & Strauss (2008, n.p.) believe that: all research is ‘grounded’ in data, but few studies produce a ‘grounded theory’. Grounded Theory is an inductive methodology. Although many call Grounded Theory a qualitative method, it is not. It is a general method. It is the systematic generation of theory from systematic research.

Borgatti (n.d., n.p.) further states that “grounded theory” refers to theory that is developed inductively from a corpus of data”. Keeping these factors in mind, the School allows students to propose and advance theories relating to specific areas of their genealogical endeavours. However, each theory must be tested and proven using basic scientific methodology. One course in particular, i.e. **Theory of Genealogy** is focused on the importance of theory in all courses in higher education. Students study the Billingsley Kinship Theory and its significance in genealogy and how the power of kinship drove migration, settlement patterns, marriage, politics, economics, and religion. Students are also encouraged to discuss other non-theoretical family studies, which focus on kinship and discuss why they are not considered theoretical works.

Plakans (2006) remarks that Billingsley has integrated anthropological theory and genealogical methodology into her Kinship Theory. According to Billingsley (2004, 153), “historians routinely clash over race, class, and gender, but kinship can often transcend and subsume all three categories of analysis.”

**Preparing and planning the programmes and courses**

At the time of this writing, according to the Sloan Report (Allen and Seaman 2011), distance education (DE) is mainstream. In the planning and development of the DE programme, management worked with specific educational and genealogical tools to make instructional advancements and through good management practices the personnel have done what Kouzes and Posner (2010) describe as getting extraordinary things done in organisations.

**The Academic Council and policy-making**

Consistent with the best practices of management to encourage communication and dialogue (Senge, 1990) throughout the organisation, the administration designed an Academic Council. This Council is composed of the Chairs of Heraldry and Genealogy/ Palaeography and in the future the Chair of Documentary Sciences. Additionally the Council includes an elected faculty member, a student representative, President of the College and Vice-President. The Academic Council is to be concerned with all policies of curriculum, teaching and learning. Further, the Council makes recommendations to the President for new programmes and modifications in existing programmes.

**Distance-learning**

In the implementation and practice of the programme the foremost priority was that the training reflects good teaching in the D.E. platform. The leadership was guided by the American Association for Higher Education’s Seven Principles for Good Learning in Undergraduate Education (Checkering and Gamson, 1987) throughout the development of the certificate programme.

These seven principles are:

- to encourage contact between students and faculty;
- to develop reciprocity and cooperation among students;
- to encourage active learning;
- to give prompt feedback;
- to emphasise time on task;
- to communicate with high expectations; and
- to respect diverse talents and ways of learning.

A basic and early decision was that this unique facility would be a distance-learning school. Not only was the management team experienced in the distance education delivery mode, but the target market would be adults who would either have a full-time job or had degrees and were retired but opted to learn more about genealogy and heraldry in order to teach or set
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up their businesses in genealogical research. In addition, it was envisioned that many of the potential students would have experience in working in an online environment. The tenets of adult learning theory were also used in developing the teaching and learning processes.

**A conceptual framework for teaching and learning programmes**

An initial priority in the planning of the educational programmes was to establish a conceptual framework for the teaching and learning segments of the school. This conceptual framework consists of the three basic elements (Nicholls, 2002) including:

- The social context, which is the interaction and relationships between teaching and learning environments. In effect it is higher education setting the way of thinking about learning.
- The knowledge base. This is the knowledge that the student has about the subject or the topic.
- Psychological – i.e. the theories of learning that are employed in the particular programmes and courses.

Basic thinking in the planning stage was the tenets of adult learning theory and the need for the lifelong learning student to participate in his learning process with the guidance of caring instructors, i.e. Education of Becoming.

Thoughts about the planning and development of an infrastructure were a major priority. Word Press was selected and the website was developed with major aspects of our developing programmes. It was understood that the substructure needed to be developed and maintained as the School proceeded, in addition to the financial commitments to maintain and keep it up to date as a forward-moving distance-learning institution.

**Planning the programme faculty component**

The selection of the faculty was based on the skills and knowledge of the individuals in the related areas of genealogy. It was decided that only potential faculty with master or doctoral degrees would be recruited. The faculty was selected from the management team’s knowledge of personnel who would be qualified and had experience in teaching the subject matter at the graduate levels. Some of the administration had worked with the management in a previous university programme in genealogy. The goal was to attract students who had not only a bachelor degree as the requirement for the Postgraduate Programme, but higher degrees as well. Currently, the school is attracting students with Master’s Degrees. In keeping with the tenets relating to quality selection of faculty the former founder and director of the Genealogical, Heraldic and Palaeographic Postgraduate Programme at the University of Strathclyde in Glasgow currently serves as the School’s Chair of Genealogy and Palaeography.

**Preparing the learning sessions**

Professional development needs must be recognised in the terms of adult education.

The planners acknowledged the characteristics of adult learners as indicated by Howell, Williams and Lindsay (2003, p. 2):

> Today’s adult learners … tend to be practical problem solvers. Their life experiences make them autonomous, self-directed, and goal and relevancy-oriented. They need to know the rationale for what they are learning. They are motivated by professional advancement, external expectation, the need to better serve others, social relationships, escape or stimulation, and pure interest in the subject. Their demands include time and scheduling, money, and long-term commitment constraints.

**The one-on-one delivery mode**

The advanced distance-learning approach of one-on-one delivery is designed to attain flexibility as enrolments expanded. The adaptation of the mode for student discussion groups is accomplished through Skype and Google and other mutually agreed upon messaging/communication interfaces. Such adaptations allow interested students to share their learning experiences with others and provide the opportunity to interact with fellow pupils in the course.

**Planning for accreditation**

From the initial development of the accreditation scheme in the States, the extent to which accrediting agencies controlled school and university improvement varied. However, over the previous decade, there has been increasing pressure by the public for rigid accreditation. The role of these agencies, according to the United States Department of Education (n.d., n.p.) - is to ensure that education provided by institutions of higher education meets acceptable levels of quality. Accrediting agencies, which are private educational associations of regional or national scope, develop evaluation criteria and conduct peer evaluations to assess whether or not those criteria are met. Institutions and/or programmes that request an agency’s evaluation and that meet an agency’s criteria are then “accredited” by that agency.

Thus it was with the School of Genealogy. The potential students and especially those who would be entitled for benefits from organisations needed an accredited institution to which to apply. The School initially considered the Distance Education and Training Council (DETC), a group founded in 1926 to promote quality standards, and even regional accreditation, but due to exorbitant prices, sometimes reaching over $200,000, the School administrators began to consider other alternatives. Additionally, even with the prestige of these groups, they are still individual and private initiatives (although sanctioned by the US Department of Education). The School sought something better. The President and co-founder, having been a Fellow of The College of Teachers for many years and a recipient of the College’s FCP suggested The College as a viable alternative to American accreditation. It was also suggested that such accreditation would be of more interest to the international student and faculty community. With considerable
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demarcated learning which includes definable output objectives.

Explicit learning outcomes are expected and assessment policies in undergraduate curricula are also established by the Council of Regional Accrediting Commissions (CRAC) in the United States for all seven agencies that are responsible for the accreditation of the universities and colleges (Hubbell 2007).

It was during the curricula writing that faculty and management became involved with each to a greater degree. This is where administration according to the Kouzes and Posner (2010) worked with the five behaviours of management to get “extraordinary things done in the organisation.” They include:

- Challenging the process
- Inspiring a shared vision
- Enabling others to act
- Modeling the way
- Encouraging the heart

Each syllabus was reviewed for output goals and checked to see if at least 30% of the objectives required the higher order thinking skills of Bloom’s Taxonomy i.e. application, analysis, synthesis, and evaluation (Bloom, 1956).

Organising the curriculum

Organisational planning and design of the curricula was given attention as students would be making module selections. Administration decided to organise the programme across core themes from the various areas presented – i.e. the programme is designed in sections to include methodology, research, grounded theory, kinship, heraldry and human sciences.

Presenting the sessions was within the framework as dictated by each syllabus, which followed the timing reflected by the Carnegie Standard of credit hours for a semester and the distance educational equivalent, being 16 weeks with an introductory module of five weeks. During the first week of the course (i.e. module), the student and instructor discuss academic and technical ramifications of the syllabus and the timeline for each weekly assignment, the major project and the final examination. Instructors often took a hands on approach (technical) to their material presented, while other faculty was more research- and theory-oriented.

Establishing a monitoring subsystem of student progress in learning

Monitoring the systematic progress of the students through each module is a priority of the School’s administration in the DE programme. Accreditation agencies want documentation and evidence of how institutions monitor student progress. In distance education this has always been an issue from the early years relating to quality instruction. With the ‘bricks and mortar’ organisation, faculty can see a student coming to class and daily attendance is often taken for monitoring pupil interaction and participation. In distance education a student may get lost unless there is close monitoring from management and records kept.

The administrative team at the School has set up a monitoring system that includes a one-page questionnaire on the progress of each student. This document must be submitted by faculty every eight weeks. In this submission, each student is asked what assignment he/she is doing at the time of receipt of the progress report and if he/she is having any concerns or issues in working with the instructor, or any communication problems in working at a distance. The student is asked to return his/her responses to the Vice-President. Likewise the instructor receives a short questionnaire to report on the progress of the student. The management team wants to determine whether there are any problems encountered in interaction, resources or assignments. The goal is that the objectives of the module are being achieved. This questionnaire is immediately reviewed by administration and issues and problems are addressed. The priority is to implement a monitoring subsystem on students’ learning and progress through the modules in a timely manner.

Evaluation of the course by the student learner

All students have the opportunity
to evaluate the course as a whole; the content, the assignments, the assessment practices and the teaching in an on-line questionnaire. They are also asked to make any recommendations to the Vice-President. Any issues arising or suggestions are discussed with the instructor involved. Further evaluation of the course is taken up by the management team of every course in consultation with the instructors.

Professional development - a major priority for all instructors

Professional Development of all members of the School is a top priority in management. The School has sent two representatives to the annual Family History Conference in the UK which is held in London at Olympia. This conference is advertised as the biggest family history event in the world. Their reports were put on the School’s website. In addition, the management team is planning on an exhibit for next year promoting the School. The School has yet to be widely known and needs to be promoted more broadly in the media. Instructors are required to submit yearly professional development forms relating to courses taken, conferences attended, honours received and learned societies joined.

Conclusion

All in all in the short time that the American School has been in operation it has accomplished much and will continue to work on the priorities of moving the postgraduate programme forward into a full Master’s Degree Programme.

References


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