I. Essential Topics

- Introduction to Course/Overview
  - Genealogy in general and Jewish Genealogy (JG) in particular
  - Place of genealogy in other cultures (ancient dynastic [e.g. Sumerian, Egyptian], Arabic, European, Chinese, African tribal)
  - Place of genealogy in the Jewish weltanschauung
  - Ancient Jewish traditions – biblical, rabbinic literature
  - JG as an independent field of investigation and as a sub-branch of Jewish studies (and not merely a useful methodology or research tool)
  - Contemporary scholarly JG – from Leopold Zunz to Malcolm Stern and beyond (Paul Jacobi)
  - The emergence of academic JG (as against popular/hobbyist family history)
  - Macro-JG (as against micro-JG, focussing on individuals/personal lineages)
  - JG as “generational history”
  - From a diachronic perspective (historical) to a synchronic one (focussing on a geographical cross-section)
  - Inter-disciplinary nature of JG – e.g. associated with various social sciences (sociology, demography, migration studies, statistics, etc.)
  - Opening to questions of wider interest, not only to Jewish genealogists but also to scholars in other areas of the humanities and social sciences
  - Need to “contextualise” the narrative - essential for broader relevance
  - Use of scientific method – primary sources, verification, critical evaluation
  - Theoretical aspects – research questions, working hypotheses
  - The purpose of the research – meaningful insights into Jewish history and society through an innovative, essentially human prism
  - Goal: to put JG on a par with other analytical approaches to Jewish history and society
JG as an Inter-disciplinary Field of Study

- JG and History (general or topical – e.g. European history/military history))
- JG and the social sciences (Sociology, Anthropology, Ethnology, etc)
- JG and the law (including “Forensic Genealogy” for heirs, real estate owners, Holocaust victims, legal aspects of name changing)
- JG and statistics, quantification sciences (modelling macroscopic behaviour)
- JG and the human sciences (genetics, DNA studies, etc.)
- JG and the medical sciences (Jewish diseases)
- Computer science (soundexes, merging systems)

Jewish History/Geography Overview

- From the cradle of Jewish history (Land of Israel as genealogical epicenter of Jewish People)
- Bible times and Biblical sources (lineages, tribal genealogies, reservoir of names)
- Exile and Diaspora – dispersion of Israelite and, later, Jewish groups
- Time lines – directional (migratory) lines (Babylon and beyond, Mediterranean basin, Europe)
- Areas of history and geography pertinent to Jewish Genealogy, in particular since the Middle Ages (availability of primary sources and other records)
- Shifting boundaries, changing jurisdictions and political systems
- Spread of “Oriental” and North African Jewish communities
- Rise in Spain, followed by Expulsion and dispersion throughout the Mediterranean basin and beyond, including the Americas
- Rise of Ashkenazi community in Europe – France, Germany, Poland
- Impact of persecution and pogroms on the family unit
- Migration due to various pressures (demographic, economic, coercive)
- Christian restrictions on Jews, their freedom of movement, occupations, etc.
- Limitations on places of residence – first ghettos in Italy; Alsace (but not throughout France)
- German and Polish cities that had the ‘right’ not to have Jews live there
- Partitions of Poland (Russia, Prussia and Austria)
- Pale of Settlement and life therein - shtetl Jews/village Jews ("yishuvnikes")
- Permanent surnames; military service - and their effect on families
- Size of families, infant mortality, life expectancy; population explosion
- 19th century challenges: emancipation, industrialization, urbanization, modernization in general
- Demographic shifts at the turn of the 20th century – the rise of North American Jewry, South American Jewry, South African Jewry etc. Holocaust and the annihilation of one-third of world Jewry
- Israel – "Ingathering of the Exiles"

Bibliography:

Bartal (2005)
Ben Sasson (1976)
Friesel (1990)
Gilbert (1993)
Orfali in Demsky [2010]
Rowland (1986)

➤ Jewish Religion and Practice as pertinent to JG

- "Who is a Jew" – from religious point of view to a JG perspective
- Jewish identity (halachic and other definitions) and self-identity
- Patrilineal and matrilineal aspects
- Dichotomies – Ashkenazi, Sephardi, and others
- Unifying practices
- Differing traditions
- Language and dialect
- Other indicators (clothing, cuisine, etc.)

Bibliography:

Rhode (2004)

➤ Life’s “Passages” as pertinent to JG - birth, marriage, death

- Birth – circumcision, public naming ceremonies at birth (brit for boys; synagogue announcement for girls, zeved ha-bat).
- Marriage practices (including marrying age) and patterns
- Polygamy/monogamy
- The shidduch – arranged marriages, selection values, patterns
- Divorce, agunah
- Childlessness and impact on preservation of lineage - including halitsah, marriage to dead wife’s sister
- Cousin marriages, incest, forbidden degrees of marriage, adultery
- Illegitimate children, adoption (for different reasons)

- Inter-marriage with non-Jews – impact on JG, Family Trees
- Exclusion, excommunication
- Death – memorializing dead relatives

Note: Bar Mitzvah (induction into the religious community) is not relevant to genealogy

Bibliography:

Goldberg (2003)
Kuper (2001)
Schellekens (1999)

Family and Community

i. Family

- Meaning of kinship for JG purposes
- Nuclear units/extended family – mishpoches among Ashkenazim
- Traditional structure and institutions
- Festive/memorial occasions for family preservation and kinship bonding
- Evolving nature of family - as evidenced in non-Orthodox streams of Judaism, and as impacted by changes in modern and post-modern societies
- Single parenthood/non-permanent relationships
- Relevance to JG – “blood” lines or more “inclusive” approaches

ii. Community

- Structure over time and place
- Generational aspects
- Societal/sociological issues (stratification, leadership)
- Urban Jews/village Jews (= shtetl // “yishuv” or dorf life styles),
- Kinship links, “family circles”, and other social/economic networks (Landsmanschaften)
- Jewish trades and occupations – bonds between craftsman, members of a profession (Jewish guilds)
- Value systems in Jewish communities – “Yichus” based on age, learning, profession, wealth
- Leadership as a generational phenomenon (e.g. Ben Maimon family, Cairo)
- Impact on pedigrees

Bibliography:

Baron (1948)
Bahloul (1990)
Onomastics

i. Introduction:

- The field of onomastics
- The importance of a name
  - Names as a means of identity (cultural code containing personal and communal memories of the past; contemporary allegiances and future hopes)
  - Names as a means of preserving genealogical memory
  - Names as a tool for genealogists to trace ancestries
  - Names as a tool for social historians to examine changing beliefs, values and fashions.
- Meanings of names
- Types of names: given names, family names, nicknames, place names (toponyms); 'sacred' (Hebrew) and 'profane (vernacular) names'

ii. Given names

- The Bible as a reservoir of given names
- Double names in Hebrew and in foreign languages in the Persian, Hellenistic and Roman periods
- Talmudical and rabbinic literature as sources of names
- Names in the medieval period
- Double names in Hebrew and Yiddish
- The modern period in different Jewish communities, including Israel
- Name giving practices for boys and girls
- Pejorative and restricted given names
- Names for converts

iii. Surnames

- Historic motivations of surname adoption in the different communities
- Adoption of surnames as administrative requirement
- Typologies of surnames: patronyms, matronymics, lineage, residential (toponymic), occupational, religious functionaries, acronymic, ornamental (colours, metals, vegetation, animals, geography), physical characteristics, personality traits, Jewish values
- Adoption of different surnames as a product of migration
- Adoption of non-Jewish surnames
- Adaptation/Anglicization of Jewish surnames
- Modern Hebrew surnames
- Problematics of variant spellings
- Problematics of name changes in the modern era
Naming patterns – a guiding light for Jewish genealogists?

- Naming pattern customs and conventions
  - among Ashkenazim
  - among Sephardim
- Customs and Trends in Husband/Wife family names

Bibliography:

Beider (2008), Introduction
Beider (2001)
Blatt (2004)
Demsky (1997), vol. 1, pp. 7-12
Demsky (2010)
Malka (2008), pp. 85-95
Sack (2004)

➢ JG the end of the 18th Century, by Region

Broad overview, with detailed focus on any of the following:

- The Pale of Settlement (within that - Litvakland, Poland, Galicia [or modern states carved out of the Pale: including the Baltics, Lithuania, Belarus, etc.])
- Central Europe
- “Western Europeans and Others” (including Southern Africa, Australia, etc.)
- Spain, Italy and the Mediterranean basin (within that, the former Ottoman Empire)
- Egypt and North Africa (including the Berber connection)
- Jews in Arab Lands - Iraq and its Diaspora in India and the Far East
- North America
- Latin America

Bibliography:


Example of Italy and Italian Jewry:

- Earliest community – from Roman times (the 4 ancient Jewish families)
- Growth and southward spread of Jews on Italian Peninsula – religious/cultural dependence on larger Jewish centres elsewhere
- 13th-14th centuries - Eclipse of communities in south (Sicily, Naples)
- 15th - 16th centuries – arrival of Jews from Spain (after Expulsion)
- Development of communities from Rome north– including small towns/villages
Expansion of 3 core elements (local “Italian” Jews, French Jews from north-west and German Jews from north-east) – interaction and collision between the groups

Catholic Church and the Jews, especially in Papal States – restrictions, 1st ghettos, quickly spreading to all major towns.

Freezing of residential and population patterns > stabilization of the local communities

19th cent. - Rebirth of Italy: from liberation from the ghettoes to Mussolini’s Race Laws: emancipation, acculturalization, assimilation, discrimination

The Holocaust and the re-building of the Jewish community – new arrivals (Libya, Egypt)

Effects of all of the above on Jews and their family history over the centuries:

- Diversification
- Pluralistic religious traditions and liturgies
- Cultural dependence and family ties between Jews in Italy and external centres – at outset, Jerusalem, later with Spain, on through Renaissance with Ashkenazi communities (Prague, Cracow)
- Forced movement into ghettos-safe-havens in certain principalities, etc
- Name taking
- Social structure/family and occupations (primarily usurers, artisans)
- Education, scholarship and values
- Conversion as a factor

Preservation of memory
Preservation of communal archives, including genealogical records
Available records (e.g. Ketubot Collection in National Library of Israel at http://ram1.huji.ac.il:83/ALEPH/ENG/MSS/MSK/MSK/SCAN-R/0207128

Bibliography:
Bonfil (ca. 1994)
Colletta, Gruber, Soria (2004)
Roth (1946)
Toscano (2005)

Separate Branches of the Jewish People and Diverse Groups

i. Branches
- Yemenites
- Ethiopians [Ben Zvi Institute studies]
- Indians (Bene Israel)
- Karaites [Ben Zvi Institute studies]
- Others, such as “Lost Tribes”

ii. Diverse Groups
- Samaritans (never regarded as a “Lost Tribe”)
- Khazars
- Conversos/Marranos
- China (Kaifeng)
II. Wider Topics & Practical Aspects

(a) Wider Topics

- **Jewish Demography for JG**
  - Overview of historical demography
  - Dispersion of the Jewish communities post-1st Temple
  - Early development of the Diaspora
  - Formation of major groupings of Jews
  - Migrational patterns in medieval and pre-modern times
  - Modern shifts in Jewish demographics, especially since 1880’s
  - Statistics - over time and place
  - Distribution - over time and place
  - Birthrates (fertility) and lifespans (expectancy) - over time and place
  - Effects of plagues, warfare, pogroms
  - Migration as challenge to genealogical memory
  - Acculturation, conversion/assimilation
  - Affiliation/denial of Jewish origins in the modern world
  - Impacts on Jewish families and communities

Bibliography:

DellaPergola (2001)
DellaPergola (2002)
DellaPergola, Rebhun, Tolts, (2005)
Foa (2000)
Gilbert (1993)
Hundert (1999)
McEvedy (1972)
McEvedy (1982)
Wagner, Klauzinska (2007)

- **The Shoah and JG**
  - Holocaust research, focussing on basic historical questions.
  - Overall outline and processes involved
    - Pre-War Nazi threat in Germany and Austria
    - Fear, persecution, dislocation
    - Increased emigration
During War, following Nazi invasions of Poland and other countries
  - Deportations to concentration camps
  - Systematic liquidation of communities, *in situ* and in death camps

- Problematics of identifying victims and their names
  - Changing of names or their pronunciation
  - Concealed identities and hiding (leading to the adoption of gentile names and nicknames)
  - Round-ups and deportations (during which names were misspelled, distorted).

- Memorialization - Yad Vashem/US Holocaust Memorial Museum/other Holocaust museums
- Construction of the major databases to recover names of victims and survivors (*"Dapei-Ed"* – Pages of Testimony; use of deportations lists; immediate post-war lists of survivors; listings made since the mid-1990s for restitution purposes)
- Additional sources
  - International Tracing Service - ITS (Bad Arolsen)
  - *"Yizkor"* Books; necrologies; local histories commemorating Jewish communities (growing phenomenon in Germany and western European countries; often include necrologies)
- Restitution and other claims employing JG
- Use of databases as primary sources/raw material for JG research projects

**Bibliography**

DellaPergola (1996)
Gilbert (1982)
Gutman (1990)
Lestchinsky (1948).
McEvedy (1982)
Michman [2010]

**Genetics and JG**

- “Relatedness” of different Jewish ethnic groups
- Uses of DNA for JG
- Existence of a Jewish Haplotype?
  - Y-DNA in paternal line
  - MitDNA in matrilineal lines
- Ashkenazi and Sephardic DNA
- Cohanic and Levitic identities
- African tribes and other groups (Lemba, Abayudaya tribes)
- Jewish genetic traits, medical conditions and hereditary diseases

**Bibliography:**

Behar *et al* (2008)
Rabbinical Genealogy

- Centrality in JG
- “Jewish aristocracy” = Leading rabbinical families (Ashkenazi/Sephardi)
- Survey of rabbinic sources and literature (e.g. Sherira Gaon, Maimonides, Ha-Meiri, recording their personal lineages)
- Genealogies of eminent rabbis and scholars
- Chassidic dynasties
- Fictive/"constructed” rabbinical trees
- Rabbinical lineages in contention
- Rabbinical anthologies, compendia, encyclopedias as sources

Bibliography:

Friedman (1997)
Friedman in Sack, Mokotoff (2004), pp. 77-89
Rosenstein (1990)

Myths, Legends, Polemics and Abuses in JG

- Sumerian, Egyptian, Greek and Roman myths (descendancies from the gods)
- Biblical genealogies (descendancies from men); king lists, royal pedigrees
- Priestly lineage (Eleazar and Itamar, non-Aaronites)
- Claimed descendance from the House of David
- The Rashi Legend
- Contested lineages (e.g., Luria, Vilna Gaon)
- Manipulation of lines for political and other purposes (status, legitimisation, inheritance)
- “Aristocratic” origins (e.g., Spanish origins of Ashkenazi families)
- Self-attributed trees/ self-aggrandisement

Bibliography:

Einsiedler (1992)
Franklin (2005)
Friedman (1997)
Rosenstein (1990)
Rosenstein (2006)
Schellekens (2003)
Schellekens (2006) on Biblical genealogy
Schellekens (2006) on the House of David
Wilson (1977)
(b) **Practical matters**

- **JG Ethics and Standards**
  
  i. **Ethics**
  
  - Use of data/information in the public domain
  - Use of data conveyed by living informants
  - Privacy issues
  - Holocaust issues
  - Legal issues
  - Copyright issues
  - Plagiarism, Fraud

  **Bibliography:**

  Kallmann (2008)
  Sobel (2007)
  Swift (2000)

  ii. **Standards**

  - Genealogical standards in general
  - Citation of evidence
  - Admissible evidence, supporting evidence, - as against probability, hypothesis, speculation
  - Recording of Names, Places and Dates
  - Recordings of generations (Jacobi’s Absolute Generations Scale)
  - Transliteration systems (Hebrew, Yiddish, Arabic, etc.)

  **Bibliography:**

  BCG Standards Manual
  Mills (2007)
  Mokotoff (2008)
  Rapaport (2009)

- **Oral History**

  - Importance contribution of Oral History and its potential for JG
  - Theory and practice
  - Conducting an interview to maximize JG information retrieval
  - Construction of questionnaire
  - Interviewing techniques:
    - Preparation of interview (maximizing data on informant, etc.)
    - equipment;
    - frequent problems:
      - reliability/tendentiousness
      - impact of personal relations
    - techniques for the revival of memory
  
  - Legal permission from informant
- Means of collecting documents, pictures etc.
- Differentiating between Oral History ("primary information") and Family Lore ("bobbe mayses")
- Critical evaluation of the narrative and its reliability; verification/corroboration
- Interpretation of the narrative
- Indirect information on historical context - social environment, traditions and customs, political motivations, patterns of acculturation etc.
- Identification of Oral History archives appropriate for given research project (e.g. for modern Jewry, the Oral History Division at the Hebrew University, Jerusalem at: http://icj.huji.ac.il/archives_ohd.asp; for Central Europe research, the Centropa archive at www.centropa.org. for Holocaust research, the USC Shoah Foundation at http://college.usc.edu/vhi

Bibliography:

Henige (1971)
Epstein, Lewit, Mendelsohn (1994)
Thompson (2000)

➤ Research Strategies and Methodologies

- Working with JG information explosion
  o Effective strategies and methodologies
  o Integrating/merging datasets
  o Synthesis – creating new knowledge from existing data
- Original research
  o Research plans
  o Research questions
  o Working hypotheses
- Problematics in primary sources
  o Accuracy of sources
  o Special problems with censuses – including “fixing” of censuses; uncensused populations, compatibility of census data
- Critical use of sources (direct vs. indirect evidence; inaccurate names, ages, etc. etc.)
- Systems for enumerating generations (Jacobi Absolute Generations Scale)
- Essential skills
  o Language skills
  o Research skills, including archival skills
  o Data organisational skills

Bibliography

Gladstone (2004)
Kurzweil (1980)
Klauzinska (2009)
Rapaport (2010)
- **Jewish JG Records**
  - Vital records (including Mohel books)
  - Rabbinical Courts records (including Ketubot, gittin)
  - Synagogue records, minute books
  - Community Registers (Pinkasim), minutes of synagogues, communal societies
  - Burial Society records (hevra kadisha)
  - Special sources (Memor books, Prenumeraten)
  - Montefiore Censuses in Palestine, Egypt
  - Shoah records (including Yad Vashem, etc, Bad Arolsen etc.)
  - Jewish Agency records
  - Hebrew Immigration Aid Society (HIAS) and Joint Distribution Committee (JDC) records

**Bibliography:**

- **Jewish Cemeteries and Necrologies**
  - **i. Gravestones**
    - Cemeteries as bridge to generations past and their re-construction
    - Burial practices in cemeteries (family plots, separation of men and women, infants, suicides, bastards, prostitutes, etc.)
    - Reading stones in Hebrew:
      - Names (male, female)
      - Dates (Jewish calendar)
      - Conventional abbreviations (ותג יד המות)
      - Standard phrases
      - Symbols on gravestones (Kohanim, Levi'im, scholars, trades, etc.)
      - Painted stones
    - Differing traditions where relevant (Ashkenazi, Sephardi, etc.)
    - Physical problems
      - Broken, weathered stones
      - Wooden stones
      - Ancient cemeteries
      - Untended, razed cemeteries from modern era
      - Unearthed, re-located cemeteries
    - Limitations of tombstone information
  - **ii. Auxiliary sources**
    - Utilization in conjunction with other sources:
      - Cemetery registers and other burial records
      - Online cemetery records JewishGen, etc.
      - Necrologies in various forms (Yizkor books, etc.)
    - Merging incomplete data from stones and other records
    - [Practical exercise – visit a traditional Jewish cemetery]
Bibliography:

Krajewska (1993)
Menachemson (2007)
Reiner, Tarbitz
Sachs and Blatt (2004)
Schafer (1991)
Schwartzman (1993)

➢ JG in Cyberspace – Techniques and Technologies

- Search engines
- JewishGen, in its various aspects
- SephardicGen and its resources
- JRI-Poland and SIG’s
- Other Jewish sites on the Web
- JG Software (Ilanot, Dorotree, My Heritage, etc.) – advantages/disadvantages of different systems (static, dynamic, interactive)

➢ Additional Sources and Resources

- Archives (primary sources) – overview by regions
- Civil and religious vital records
- Public records, printed sources (secondary sources) - among others, immigration, naturalisation, military, death/burial records
- Censuses - Russian “Revisions”; European, US and other national censuses.
- Notarial records of early Spain and Italy
- LDS collections/ Family History Library Catalog
- Databases (Ellis Island) Shipping records
- Name changing records, etc

Bibliography

➢ Auxiliary Tools

- Maps, gazetteers
- Local histories
- City and business directories
- (Jewish) newspapers (many languages)
- Libraries, reference works, guidebooks to sources
- Online people finders
- Bibliographies
- Language translating devices
- Date Converters

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