

המכון הבינלאומי לגנאלוגיה יהודית ומרכז פאול יעקבי, ירושלים



# INTERNATIONAL INSTITUTE FOR JEWISH GENEALOGY AND PAUL JACOBI CENTER

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Jewish Genealogy and Family History Course  
for MA students ©

## 1- or 2-Year MA Program Academic Guidelines ©

### 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

Bibliography:

Jones (2007)  
 Lamdan (2009)  
 Levtzion & Spaulding (2002)  
 Mills (2003)  
 Mills (2009)

➤ **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)

Bibliography:

Della Pergola (1984)  
 Hammer [et al] (2000)  
 Jones (2007)  
 Wagner (2006)  
 Wagner & Klauzinska (2007)

➤ **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
- 19<sup>th</sup> century challenges: emancipation, industrialization, urbanization, modernization in general
- Demographic shifts at the turn of the 20<sup>th</sup> 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 – *mishpoche* 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)

Kuper (2001)  
 Schellekens (1999).  
 Schellekens (2003)

## ➤ **Onomastics**

### i. Introduction:

- The field of onomastics
- The importance of a name
  - o Names as a means of identity (cultural code containing personal and communal memories of the past; contemporary allegiances and future hopes)
  - o Names as a means of preserving genealogical memory
  - o Names as a tool for genealogists to trace ancestries
  - o 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: patronymics, 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
  - o among Ashkenazim
  - o 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 18<sup>th</sup> 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:

“Researching Country of Ancestry” [country-by-country sections] in Sack, Mokotoff (2004), pp. 179-576

#### **Example of Italy and Italian Jewry:**

- o Earliest community – from Roman times (the 4 ancient Jewish families)
- o Growth and southward spread of Jews on Italian Peninsula – religious/cultural dependence on larger Jewish centres elsewhere
- o 13<sup>th</sup>-14<sup>th</sup> centuries - Eclipse of communities in south (Sicily, Naples)
- o 15<sup>th</sup> -16<sup>th</sup> centuries – arrival of Jews from Spain (after Expulsion)
- o 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, 1<sup>st</sup> ghettos, quickly spreading to all major towns.
- Freezing of residential and population patterns > stabilization of the local communities
- 19<sup>th</sup> cent. - Rebirth of Italy: from liberation from the ghettos to Mussolini’s Race Laws: emancipation, acculturation, 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)

- India (Bene Menashe)
- Lemba

Bibliography:

Ben-Zvi (1958)  
Koestler (1976)

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**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)  
Sack and Newman in Sack, Mokotoff (2004)  
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 Holocausts 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)  
 Friesel (1990).  
 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
  - MtDNA 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)

Boster, Gaulin (1998)  
 Hammer *et al* (2000)  
 Entine (2007)  
 Levy-Coffman (2005)

➤ **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:

Ben Sasson, *et al* (eds.) De Botons (1998)  
 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 (descendants from the gods)
- Biblical genealogies (descendants from men); king lists, royal pedigrees
- Priestly lineage (Eleazar and Itamar, non-Aaronites)
- Claimed descent 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 mayeses*”)
- Critical evaluation of the narrative and its reliability; verification/corroboratorion
- 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://ici.huji.ac.il/archives\\_ohd.asp](http://ici.huji.ac.il/archives_ohd.asp) ; for Central Europe research, the Centropa archive at [www.centropa.org](http://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)  
 Schellekens (1995).

### ➤ **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:
  - o Names (male, female)
  - o Dates (Jewish calendar)
  - o Conventional abbreviations ( *פ"נ*, *ת.נ.צ.ב.ה.*, וכדומה )
  - o Standard phrases
  - o Symbols on gravestones (*Kohanim*, *Levi'im*, scholars, trades, etc.)
  - o Painted stones
- Differing traditions where relevant (Ashkenazi, Sephardi, etc.)
- Physical problems
  - o Broken, weathered stones
  - o Wooden stones
  - o Ancient cemeteries
  - o Untended, razed cemeteries from modern era
  - o Unearthed, re-located cemeteries
- Limitations of tombstone information
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#### ii. Auxiliary sources

- Utilization in conjunction with other sources:
  - o Cemetery registers and other burial records
  - o Online cemetery records JewishGen, etc.
  - o 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)  
 Kurzweil (1994), pp. 342-358.  
 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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