

Essay

# Ethical Dilemmas and Family History: A Psychological Approach

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**Abstract:** Family historians frequently encounter ethical issues in the course of their research, and many come to recognise the moral dilemmas facing them. Common dilemmas revolve around topics such as whether family secrets should be revealed or favourite stories debunked in light of the evidence, how the privacy of living relatives can be maintained when family histories are published, if the ‘sins of the fathers’ require reparation (and how this might be possible), and to what extent is it acceptable to romanticise or ‘whitewash’ one’s ancestral story. In this paper, dilemmas such as these are discussed using the theoretical framework of psychologist Jonathan Haidt whose model of five moral ‘instincts’ includes care, fairness, loyalty, respect for authority, and sanctity. It is concluded that examining ethical issues using such a framework has the potential to stimulate empathy, reduce impulsive action, and increase the likelihood of finding creative solutions to moral dilemmas.

**Keywords:** ethical dilemmas; ethics codes; genealogical ethics

## 1. Introduction

Hobbyist family historians are not bound by a formal code of ethics in the same way as those who gain professional accreditation and offer their services for payment. They will of course have personal ethical principles but might be challenged as to the best course of action over issues arising from their research, for example, whether to present evidence to family members that a long-held family story is a myth. Some who may not have considered the ethical implications of their research strategies or follow-up behaviours can find themselves in uncomfortable and stressful situations. For example, the excitement and subsequent sharing of a ‘new discovery’ could cause consternation among family members and lead to relationship tensions and even break-downs. Not all family members will be happy to have family secrets exposed.

It seems that genealogists commonly find themselves facing ethical/moral dilemmas. An Australian survey-based study of 775 hobbyist family historians found that more than half had experienced such dilemmas in the pursuit of their hobby (45 per cent sometimes, 8 per cent often) (Moore and Rosenthal 2020). Examples included whether to expose family secrets, whether to publish research findings that might be hurtful or shocking to others, plus privacy, informed consent, and plagiarism concerns. Walters (2019) also presented data showing frequent common dilemmas among family historians including questions about who owns the data on public trees, how the contributions of researchers should be acknowledged, what to do about incorrect information posted online, the privacy rights and concerns of living individuals, and how to deal with other family history researchers behaving badly, for example making demands, using offensive language, and generally being insensitive.

What do we mean by ‘moral dilemma?’ One excellent definition comes from Kvalnes (2019): ‘Moral dilemmas are situations in which the decision-maker must consider two or more moral values or duties but can only honor one of them; thus, the individual will violate at least one important moral concern, regardless of the decision’ (p. 11). In a very



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general sense, the conflicting moral values for genealogical researchers usually relate to a tension between discovering documented evidence about a family-related event of which they were previously unaware (and is often unexpected) and deciding what to do about it. On the one hand, the hobbyist genealogist is generally motivated to find out more about this new information and present it in some form (such as adding it to a family tree, verbally informing family members, or publishing written material) but, on the other hand, recognises that there are potentially negative outcomes associated with asking too many questions and/or making this information public—for example, hurt feelings, anger, or relationship stress. Professional genealogists, because of their training, are less likely to be thrown by unexpected findings and more likely to have warned their clients of the potential for surprising or even distressing outcomes that can accompany genealogical research. Nevertheless, they can still face ethical dilemmas regarding the manner in which they communicate family secrets, lies, and misinformation and the way that they interpret these findings to clients.

It is worth raising the question as to why some individuals or families keep secrets, prefer to avoid thinking about the past, and maintain family myths against evidence to the contrary. Family secret-keeping, it has been argued, serves not only to protect individual and family reputations but can contribute to a social and even national ‘amnesia’ about injustices of the past. Examples include disturbing findings about how unmarried pregnant women were treated by both church and state in earlier times (e.g., [Browne 2012](#); [Evans 2013](#)), injustices toward Indigenous populations among colonised nations (e.g., [Barnwell 2018](#); [Shaw 2021, 2022](#)), and ‘secrets’ about the behaviour of nations and individual soldiers during wartime (e.g., [Bifulco 2021](#)). Narratives of nationhood can be damaged by the emergence of these secrets, with social and political outcomes. At the individual and family level, fashions change in relation to which behaviours are socially acceptable so that what seems normal for a family historian researcher may be considered shameful among his or her parents or grandparents. For example, the stigma once attached to unmarried motherhood is no longer widespread, but that does not mean that a person who has kept this secret for many years—either about themselves or an ancestor—will be happy to have it exposed for others to see in a public forum. In Australia, those with convict ancestors once hid the truth, but this is now rarely the case ([Evans 2011](#); [Smith 2008](#)), although, as [O’Connor \(2021\)](#) points out, when family historians present their stories of criminal ancestors, they invariably dilute the crime in some way, such as explaining it as a reaction to unjust social conditions. Redefining the ‘once shameful’ as now acceptable is a way of dealing with the ethical dilemma of whether to share some family secrets. However, it can hardly be applied to secrets that, while once possibly viewed as acceptable in a nation’s history, are now recognised as heinous—including slave ownership or participation in genocide and other war crimes.

As well as being aware of ethical minefields such as the above, genealogists must obey the laws of the land with respect to privacy, informed consent, copyright, slander, harassment, etc. It seems likely that many hobbyist family historians will not know how these laws apply to their private ancestral explorations, or even that the laws exist, whereas professional genealogists have a duty to be aware of them according to genealogical codes of conduct. While the family history procedures of hobbyists will rarely come to the notice of the law, those who publish their work outside of their own family domain would do well to educate themselves on practices to avoid. [Bottner \(2001\)](#) points out how complicated these laws are in an article discussing whether it is possible to legally defame a dead person. He compares Australia, where the law does not allow for this possibility, with Germany, where, in law, ‘the protection of human dignity endures after the death of a person’ (p. 4). But even when there is no law against defamation of the deceased, various writers argue the importance of handling sensitive information in an ethical manner, particularly when historical subjects may have living descendants ([Agutter 2023](#)).

The moral and sometimes legal dilemmas that arise from genealogical research can be distressing to researchers and the researched alike. [Moore \(2023\)](#) reported that around

two-thirds of the hobbyist family historians she surveyed had experienced strong negative emotions like distress, sorrow, and anger as a result of their research findings and that some of these emotions arose from the stresses attached to ethical dilemmas. Several writers have discussed such issues, in books (e.g., [Walters 2019](#)), blogs (e.g., [Philibert-Ortega 2019](#); [Russell 2017](#)), online genealogical communities (e.g., [Luebking and Szucs 2013](#) [for Rootsweb]), professional genealogy organisations through their codes of conduct (e.g., [Association of Professional Genealogists 2023](#)), and via family history group or formal society websites, Facebook pages, and newsletters. Resources such as these provide useful guides, but newcomers to the family history hobby, and those less connected to genealogical societies or online groups, will not necessarily come into contact with them when help is needed.

## 2. How Do Family Historians Resolve Their Moral/Ethical Dilemmas?

How do family historians decide on the best course of action? Moral dilemmas arising from genealogical research can be considered from a range of different discipline perspectives, each of which can make a useful contribution to how we understand and deal with these dilemmas. This paper puts the spotlight on psychological approaches to decision-making and examines their usefulness for understanding genealogists' decisions and behaviours in ethically ambiguous situations.

Psychologists have examined the processes of decision-making in general, but as [Rogerson et al. \(2011\)](#) point out, 'The scholarly work on *ethical* decision making has been scant' (p. 622, italics mine). This is despite the discipline of psychology taking ethics seriously, producing regularly updated ethical codes for both research and practice (e.g., [American Psychological Association 2017](#); [British Psychological Society 2021](#)). Furthermore, research on the psychological processes of ethical decision-making among family historians is non-existent, although as summarised above, scholarly work has been performed in relation to what *constitutes* a moral dilemma in genealogical research and the social conditions that might lead to these dilemmas.

Rogerson et al. critique current psychological models of ethical decision-making as being too heavily reliant on the assumption that ethical decisions are largely controlled by cognitive processes such as reasoning and logic. They argue that cognitive models of decision-making in ethical domains have little research support. What is missing, they suggest, is a consideration of the many nonrational processes that influence our decisions and actions in situations of moral ambiguity. They conclude that, in ethical decision-making, 'Reason cannot overcome the power of the passions merely by ignoring them. Emotions and values exert their powerful influence through automatic and intuitive processes' ([Rogerson et al. 2011](#), p. 622).

In training psychologists and counsellors to be good ethical decision makers, [Rogerson et al. \(2011\)](#) recommend that a self-reflective attitude be encouraged, one that incorporates self-monitoring and taking a 'devil's advocate' approach to first impulses to action in morally ambiguous situations. When emotions are high, it is easy to jump to unwise solutions. Taking time to interrogate the emotional underpinnings of one's initial responses to moral dilemmas allows the opportunity to examine a situation from more than one perspective and use the processes of rational problem-solving. This kind of understanding and response delay is likely to be of use not only to those who work with others in a professional capacity (such as psychologists, counsellors, and professional genealogists) but also to those who relate to others through volunteer work and in the conduct of their hobbies—such as most family historians.

One psychologist who has developed a model of ethical decision-making that emphasises emotions is Jonathan [Haidt \(2001, 2012\)](#). His view is that in such decision-making, it is intuition, guided by emotions, that comes before reasoning. In adults, he says, 'moral intuitions arise automatically and almost instantaneously, long before moral reasoning has a chance to get started . . .' ([Haidt 2012](#), p. xiv). These moral intuitions are part of an evolutionary adaptation, alerting us to be cautious as to subsequent action. We get a

feeling that something is wrong, that there is a problem, but ‘... our intuitions are abstract, lacking specific content’ (Bucciarelli et al. 2008, p. 122). As adults, through the lens of the moral code in which we have been socialised, and with the application of reasoning, we learn to move beyond the instinctive responses of ‘fright, flight or fight’ and choose actions more adaptive to the situation. As pointed out previously, not all theories of moral decision-making propose that feeling comes first and reasoning later. Many, for example, Hauser (2006), postulate it is the other way around. However, there is agreement that moral decision-making includes both cognitive and affective elements.

Haidt postulates five innate ‘moral foundations’, that is, five types of feeling that can arise when we face a moral dilemma. They are care/harm (a feeling that our actions might hurt someone), fairness/cheating (a feeling that something unjust has or could occur), loyalty/betrayal (concern about not supporting one’s family, tribe, or clan), authority/subversion (concern about breaking laws or rules), and sanctity/degradation (recognising the importance of honouring ancestors). Haidt calls these foundations ‘innate’ or ‘first drafts’ because they can be moulded by experience. They are ‘pre-wired’ not ‘hardwired’, in the sense that they will be shaped by the moral codes to which we are subjected, especially in childhood, thus accounting for individual and cultural differences in the strength and content of moral intuitions. So, for example, our socialisation will influence which individuals or groups we are most likely to care for and feel loyalty to, what we recognise as ‘fair’, what social contracts we buy into to provide rules to live by, and what aspects of existence we honour.

Haidt applied his five foundations of morality to politics and religion, but in this paper, I attempt to apply them, with examples, to the conflicting feelings and ethical/moral dilemmas we face in dealing with family history data.

### 3. Study Aim and Methodology

The aim of this paper is to discuss moral dilemmas that arise during genealogical research using the psychological decision-making framework developed by Haidt (2012) and described above. This is important because Haidt’s model gives us a different lens to view genealogical moral dilemmas, focussing as it does on non-rational processes as the initial signals we experience when such issues arise. Considering ethical dilemmas through the ‘feeling’ lens may be useful in developing ways to educate (or warn) genealogists to slow down their initial impulses to respond too hastily. Given Rogerson et al.’s review showing that there is little empirical support for the efficacy of ethics courses based solely on models of rational decision-making, it seems of value to examine whether Haidt’s model of intuitive responses to ethical dilemmas is applicable to family historians’ ethical dilemmas. If it is, it might provide a new direction for ethical information, education, and training available to hobbyist and professional family historians alike.

Material for this article is drawn from published academic papers, personal reflections, and data collected from a large-scale study of Australian hobbyist genealogists, the methodology of which has been reported in detail elsewhere (Moore et al. 2021; Moore and Rosenthal 2021; Moore 2023). The study was a survey in which we asked participants, among other things, open-ended questions about surprises and difficulties encountered during their genealogical research and whether they had experienced moral dilemmas regarding how they dealt with research results. Some of the quotes were used in previous publications to illustrate different points, and in these cases, the original publication source is acknowledged. In other instances, the quotes stem from previously unpublished data from the same study, and in these instances, the source is acknowledged as unpublished data from Moore and Rosenthal (2020).

## 4. Haidt’s Five Moral Foundations and Their Application to Genealogical Research

### 4.1. Care/Harm

We have evolved to protect the vulnerable; without care and nurture, the species cannot survive. Our care ‘instinct’ develops (to a greater or lesser extent depending on

temperament, parenting, life experience, and cultural mores) into concern about the hurt of others, particularly those in our own family. Most moral dilemmas faced by family historians involve the clash between the scientific goal of presenting their research findings and the wish not to hurt feelings or destroy the illusions of others. The quotes below illustrate examples of this tension.

*I discovered an uncle and niece marrying; a murder-suicide; . . . finding my father had a twin who died at birth. Mulling over all of these stories and deciding how to document, what to share, and HOW to share sensitively has been very challenging. (Moore et al. 2021, p. 94)*

*. . . when you find information that may be not what your parents have grown up being told, the decision as to just how much to tell them can be very difficult. (Moore 2023, p. 9)*

*There is always a skeleton in the closet and it is sometimes very hard to know whether to tell the story or keep it as a skeleton. It depends on who is still alive and who may be hurt or upset by the revelation. Something that needs to be carefully considered. (Moore and Rosenthal 2020)*

*I knew an aunt had an illegitimate child before she married. Through DNA I found her granddaughter. I have yet to inform this girl who she is. I don't feel it's my right as she has absolutely no idea of any adoption of her father. (Moore and Rosenthal 2020)*

When conveying new and challenging family history information to relatives, the family historians quoted above recognised their moral dilemma. They were aware of potential sensitivities, and they thought about ways to present the information in a caring manner—or even whether to present it at all. The conflict between whether to tell or not to tell is particularly taxing when the potential recipient of the information has not asked for it in the first place, as in the example above where DNA results uncovered a finding that could be a shock to a relative who had ‘absolutely no idea’. This can also occur when DNA tests are given as gifts to those who had not previously been actively exploring their family history. Information can be uncovered that is distressing and/or identity-disrupting to the gift-recipient if they are unprepared and uneducated about the potential of DNA. Several recent novels in the burgeoning literary genre of ‘genealogical mystery’ have described the relationship breakdowns (and worse) that can occur when individuals or their families are not emotionally equipped for genealogical surprises, for example, *The Lie* (Gray 2019) and *DNA Never Lies* (George 2022).

Even in situations where individuals hire a professional genealogist to investigate their ancestral pasts, clients can become extremely upset when findings do not meet their expectations, as noted by Durie (2017).

*Sometimes the subject is delighted by these revelations. Sometimes it is such a blow to the weltanschauung that it leads to cognitive dissonance, arising from the destruction of a long-held certainty which forms an aspect of self-identity, and the subject simply refuses to “believe” the genealogist, even when shown the relevant documents and records. (Durie 2017, pp. 4–5)*

Ideally, family historians and DNA gift-givers should prepare their relatives/gift receivers for the possibility of unanticipated findings. Such preparation entails pre-warning clients (in the case of professional genealogists) and relatives (in the case of hobbyists) of the possibility of surprises and, if findings are unexpected, communicating these findings with sensitivity. In many situations, it is better to present raw data (for example, relevant documentation), indicate the limitations of those data, and allow others to draw their own conclusions. As an example of how professional genealogists handle such issues, the Genealogical Research Service of Ancestry Victoria includes the following ethical guideline in its code of conduct:

*If the research question involves analysis of data in order to establish a genealogical relationship or identity, I will report that the conclusions are based on the weight of*

*available evidence and that the absolute proof of genealogical relationships is usually not possible.* (Ancestry Victoria 2022)

Suggested approaches to contacting potential relatives who may not be actively searching themselves—and are likely to be surprised or upset by your genealogical findings—include ‘opening gambit’ style emails, in which the family historian might say something along the lines of ‘We seem to have quite a strong DNA link. Would you be interested in exploring this further?’ It is well to be aware that possible relatives discovered with family history documentation or DNA matches have no obligation to respond to overtures, and persistent emails and other attempts to make contact can be viewed as harassment.

#### 4.2. Fairness/Cheating

Cooperation with others also has evolutionary value; we can more effectively survive in groups if there is mutual trust. This trust will only persist if we develop rules for fairness. The survival advantages of sharing tasks and resources only work well if people abide by those rules. The most obvious examples of how this is relevant to family historians come from dilemmas about issues such as informed consent, sharing research, privacy, and who ‘owns’ your ancestral story. In the Moore and Rosenthal (2020) survey study, hobbyist family historians quite frequently complained about a perceived lack of fairness/reciprocity among those with whom they had shared data; their moral dilemma became whether to continue or limit how much they shared in the future, for example:

*Some researchers are happy to take all your info but never respond or offer any of their own research.* (Moore and Rosenthal 2020)

*In the beginning I was taught to be generous, to share research, and I did. Then I found that others were awaiting my work, and my purchase of the source materials, BDMs all the things that cost so much . . .* (Moore et al. 2021, p. 100)

Others worried about privacy of the family members they were researching, both the past and present, as with this individual:

*[What is] difficult is trying to keep living people’s information private. I have strict personal rules in place regarding the storage and dissemination of private information. I am entrusted with much private family information and it is my responsibility to keep it confidential for those that are living . . .* (Moore et al. 2021, p. 95)

Gaining informed consent from every living person in one’s family tree is rarely feasible. Although companies like Ancestry, FindMyPast, and MyHeritage do not publish data on living persons, when trees are public, it is fairly easy for other researchers to uncover ‘family secrets’ that might embarrass the living, for example, that a parent or grandparent had spent time in prison or that a child was conceived before a wedding took place. On the other hand, not disclosing one’s tree publicly limits the possibility of linking and sharing with previously unknown relatives in ways that can mutually enrich genealogical information. And it is well to remember that we do not ‘own’ our ancestors or their stories.

Judy Russell (2017), in her blog “The Legal Genealogist”, summarises ethical guidelines provided by several genealogical societies. These can also be applied to the practices of hobbyist family historians. In short, they involve respecting the sensitivities and rights to privacy of living family members when publishing genealogical findings. She quotes the National Genealogical Society’s Guidelines reminding family historians to be “sensitive to the hurt that information discovered or conclusions reached in the course of genealogical research may bring to other persons and consider that in deciding whether to share or publish such information and conclusions”.

Wallace et al. (2015), analysing the ethical/advice guidelines provided for clients of genealogical research services in relation to issues like privacy and consent, noted that where such information was provided, “often it was located within lengthy terms and conditions or privacy statements that may not be read by potential clients”. So, while

advice is available to hobbyist genealogists regarding the sometimes-fraught issues of publishing, sharing, consent, and privacy in family history research, this advice does not always reach the family historian at the time it is needed. Wallace et al. recommend that companies selling genealogical DNA testing should make it clearer that clients should inform third parties (i.e., potentially impacted relatives) and also that the client's data will be linked to other databases, raising privacy issues. This information would also seem important for professional genealogists to explain to clients prior to DNA testing. Additionally, Wallace et al. speculate about the possibility of some sort of 'generational consent' process that would include more than just the individual in decisions about participating in genetic investigations. The logistics of such a process would not be simple, but as Wallace et al. point out (referring to a paper by [Lucassen \(2015\)](#) about having genetic testing without consent), "[m]ore research is needed to find out what the 'generations' around the individual think about the sharing and use of ancestry data and the implications of learning information that may not be wanted". ([Wallace et al. 2015](#), p. 8)

A contemporary moral question around the issue of fairness arises when family historians find that an ancestor (or several) treated others unfairly and that this resulted in present-day advantages to the historian's family members and/or disadvantages to the descendants of those deemed to have been treated unjustly. These inequities might have occurred at an individual or family level (for example, an inequitable financial legacy), or systemically, such as through colonisation, slavery, and racial injustice. For example, one hobbyist family historian wrote that the most difficult aspect of her family history was finding that one of her ancestors was involved in massacres of Aboriginal Australians. Another said:

*What has been difficult for me are the lies, cover-ups and 'skeletons in the closet' engaged in by both my mother's and my father's families. I have come to understand their duplicities by researching early settlers' confrontations with the first inhabitants. But I have disturbing suspicions about their behaviour during these confrontations. I fear it explains [my parents'] anger at my continual questions when I was younger. I fear I will discover a 'heart of darkness' the more I research and discover.* ([Moore and Rosenthal 2020](#))

What responsibility do we hold for our ancestors' behaviours? Some argue that the answer is 'none', while others at individual, institutional, and national levels have accepted responsibility in a range of ways (e.g., see [Pettigrove 2003](#)). The United Nations Basic Principles and Guidelines on the Right to a [United Nations Basic Principles and Guidelines on the Right to a Remedy and Reparation \(2019\)](#) outline five forms of remedy and reparations for historic violations of human rights resulting from colonisation and slavery. These are restitution, compensation, rehabilitation, satisfaction (for example, through 'truth telling', acceptance of responsibility, restoration of dignity), and guarantees of non-repetition.

Ways of attempting to resolve this moral dilemma and the feelings of guilt it arouses at the individual level may seem difficult, even impossible to accomplish, but an achievable goal is an acknowledgement of events and context when presenting ancestral stories. This involves recounting these stories in ways that respectfully incorporate multiple perspectives. As an example of this, a paper by [Heath and Barnwell \(2023\)](#) discusses a collection of photographs of Australian indigenous families from the Birrpaï tribe, taken by an amateur photographer over the period between 1910 and 1920 (The Thomas Dick Photographic Collection (TDPC)). The photographs are now held in museum collections across the world and have been interpreted as presenting the tribal families in stereotypic and patronising ways, for example, using terms such as 'stone age' and 'primitive'. What is fascinating about the paper is that Heath and Barnwell are, respectively, descendants of the photographed family and of the photographer. As 'a partnership of equals' they discuss the significance of the TDPC as valuable heirlooms for both families, re-contextualising these colonial photographs from indigenous and family history perspectives. Another example comes from [Shaw \(2021, 2022\)](#), who tells the family story of his great-grandfather, an Irish settler in New Zealand in the 1880s, but also presents his ancestor as an invader

and coloniser of Maori land. Shaw describes this approach as a ‘critical’ family history, that is, a methodology that takes more than one perspective and is therefore ‘a more honest, politically contextualised family history’ (Shaw 2021). Family historians can similarly enrich their own ancestral stories by researching the history of past times from more than one perspective, acknowledging inequities or injustice, if applicable.

#### 4.3. Loyalty/Betrayal

Once we form and maintain coalitions—the initial one being the family—feelings of loyalty ensue. We privilege the groups that provide rewards like nurture and cooperation. Going against those tribal feelings does not ‘feel right’. In family history research, this can translate into strong beliefs that family dirty linen should not be aired in public, a belief likely to conflict with the genealogist’s desire to find the ‘true story’. For example, one study participant wrote:

*[A] really distressing find was that my great aunt’s husband had committed a terrible murder. I have not been able to speak about this with the descendants of the couple.* (Moore et al. 2021, p. 94)

In examples such as the above, the drive to find out and report on family history events conflicts not only with the desire to protect living descendants from distress but also with the wish to loyally present a positive family narrative to oneself and to the world. One study respondent raised the following difficulty—a conflict between finding that ancestors had behaved badly by today’s standards and seeking to make this behaviour more acceptable through contextualising it.

*[It is] difficult finding that ancestors were involved in unsavoury behaviours or events. The difficulty is trying to understand the context of how they could do things that are socially, legally etc unacceptable today and not things I can be proud of.* (Moore and Rosenthal 2020)

Adoptees or those with an unknown parent who consider searching for their biological ties can also face the dilemma of whether such a search will seem disloyal to those who raised them. For example, although Muller and Perry (2001) found the average age at which adoptees begin searching for their biological parents is around 25 to 35 years old, some adoptees wait until their adoptive parents have passed away before they begin their search. In the following anonymous post from a family history Facebook page, one contributor wrote about how she held off searching for her biological father:

*Hey everyone, I have a dilemma and wanted to get a few opinions. My bio father was a mystery and a taboo subject, but there were always whispers among family members about his identity. Apparently he may have been the postman! A married with children postman. So for all of my life I never really wanted to look for him as it may have caused some real trouble for another family. But as I’m now in my mid-sixties, I feel that it may not be as bad. The chances of my bio father being alive are slim, but I could have half siblings and nieces and nephews, etc. Am I being selfish to look for possible family members? I’ve ordered a DNA kit but I’m undecided about putting it out there.*

Commenters on this post were almost unanimous in advising this person to go ahead with her search. Most recognised her moral dilemma but argued that she had rights (to know her own ancestry) as well as the other family members. Several pointed out that, handled with tact, and in these more tolerant times, potential relatives such as half-siblings may also benefit emotionally if contact is made.

Adoptees’ dilemmas raise the question of how do you define a family—by genetics or nurture? Garrison (2018) discusses a similar issue in relation to tribal allegiance. DNA testing that links us to particular ethnicities is fascinating but, as Garrison argues, the idea of a genetic tribal identity presents ‘challenges for communities that are defined in terms of political, social, and cultural identities’ (p. 60). Is your ‘tribe’ the one you choose or one suggested by DNA testing? (‘Suggested’ because genealogical DNA testing is currently

not particularly accurate at mapping ethnicity and can rarely pinpoint specific ancestral tribal or clan membership.) Nevertheless, unexpected ethnicity results can lead to identity and loyalty conflicts, especially if the culture with which one identifies is in some way at odds with the ethnic group/s indicated through DNA testing. Consumers (and gift-givers) ought to be prepared for such eventualities.

#### 4.4. Authority/Subversion

Haidt postulates that we have an inbuilt tendency to respect hierarchical relationships based on the recognition of legitimate asymmetries (e.g., greater knowledge, wisdom, courage, or strength) rather than coercive power. Aligning with such authority has survival benefits. Filial piety and honouring ancestors are manifestations of this respect; subversion can feel uncomfortable. As one family historian commented, “Some people do not want to know or accept the truth about people they admire” (Moore and Rosenthal 2020).

The following adoptee’s respect for her adoptive parents, who had kept her adoption secret, led her to excuse them but feel regret that they had not been honest. Her dilemma was, in a sense, how to manage competing emotions of love and betrayal.

*I have been sad to think that my parents kept the information about my adoption secret. I realize that the law at the time—1940s—protected both adoptive and birth families from having any direct contact. So, my parents probably didn’t see the need to bring the subject up. As far as they were concerned, they adopted me and I was theirs to keep. I didn’t get the chance to tell them that I would always have loved them. (Moore and Rosenthal 2020)*

Authority in genealogical research, like fairness, is also about obeying the rules of good practice and calling out those who do not, as in these quotes:

*The continual copying of trees with incorrect information that is shared and becomes the norm is annoying. Not everyone is meticulous. (Moore and Rosenthal 2020)*

*People putting incorrect (and often impossible) information on family trees on websites e.g., Ancestry because they are not independently verifying the information and others are perpetuating the errors. Compounded by many people ignoring you when you contact them to correct the information. (Moore et al. 2021, p. 103)*

The importance of not sharing false information is enshrined in codes of conduct of many genealogical organisations and societies, for example, from the US-based Board for Certification of Genealogists (BCG):

*I will not publish or publicize as a fact anything I know to be false, doubtful or unproved; nor will I be a party, directly or indirectly, to such action by others. (BCG 2023)*

As most family historians are aware, it is often difficult to avoid mistakes in a family tree, and ‘proof’ can be a slippery concept. The dilemma as to whether to make one’s tree available in the public domain is a difficult one. On the one hand, making it public can enhance contact with others who are willing to share—and sometimes correct—your information. On the other hand, if you later discover mistakes, it can be disheartening to find that many others have copied your originally wrong information. Indicating if you are uncertain about information posted to a public tree or keeping ‘experimental’ trees private are responsible strategies.

The authority of the law is particularly important for family historians. The enthusiastic desire to publish information about—or affecting—living individuals (for example, in a public tree) needs to be constrained by familiarising oneself with relevant laws. Most if not all codes of conduct of professional genealogical and family history societies emphasise the importance of knowing and keeping the local and national laws regarding copyright, privacy, and informed consent. For example, the first principle from the Code of Ethics of the Society of Australian Genealogists (SAG) is that one should:

*Seek by all reasonably available means to inform themselves about the legal principles in force from time to time governing the protection of copyright and of personal privacy. (SAG 2017)*

One way of achieving this for all family historians is to read and follow the terms and conditions of the genealogical providers with which they are connected, as well as the terms and conditions associated with the use/purchase of genealogical records, newspaper articles, etc. For those who keep their research away from the public domain and only share with interested and simpatico family members, there are likely to be fewer problems, but those who wish to present their material to a wider audience are advised to read the fine print, boring though this may be. Over-enthusiastic family historians can—without necessarily malicious intent—defame or harass living individuals and cause them distress. Examples include mistaken misattribution of parentage or the ‘discovery’ of individuals who do not want to be discovered (including those who have broken no laws as well as those who may have done so).

In an earlier section of this paper, the issue of whether it is ‘fair’ to share information that affects living people was raised in relation to privacy. This is especially relevant in the era of readily available DNA testing and the posting of DNA data on public sites. Recently, such DNA databases have been used to identify suspects and missing persons in cold cases, including apprehension of the notorious Golden State serial killer (e.g., [Kennett 2019](#)). As Kennett points out, ‘Such searches have far-reaching consequences because they affect not just those who have consented to upload their DNA results to these databases but also all of their relatives, regardless of whether or not they have taken a DNA test.’ While this invasion of privacy could seem justified to use in apprehending murderers, kidnappers, and rapists, there is potential for it to be misused through error, corruption, or overzealousness (e.g., see Michael [Connelly’s](#) (2020) thriller novel *Fair Warning* and a real case of incompetence, *DNA tampering imperils drug cases* ([Norton 2023](#)) reported in The Australian newspaper). There are also implications for families who may inadvertently incriminate their petty criminal uncles, nephews, children, or grandchildren. Kennett argues for the development of international guidelines to ensure that forensic genealogical techniques are used responsibly, and at the individual level, consumers need to think twice (and discuss with their families) whether they will facilitate law-enforcement access to their genealogical DNA results. The moral dilemma here could be perhaps characterised as authority versus family loyalty. As one reviewer of this paper pointed out, the ethical implications of genealogical DNA testing is a huge subject, deserving of a dedicated article (or even a book), but I have limited the scope of the discussion here in order to cover a wider range of relevant topics.

#### 4.5. Sanctity/Degradation

There is, according to Haidt’s theory, an inbuilt sense that some things are noble, pure, and elevated, and these are worth acknowledging/aspiring to, rather than that which is base, polluted, or degraded. Families honour their deceased through funerary rituals, obituaries, memoria, gravestones, and monuments. Community volunteers who have contributed pictures and records of more than 226 million graves worldwide to the Find a Grave website personify this desire to honour and respect ancestors. Many family historians, including those in my own family, have gone to a good deal of trouble and expense to place plaques on the unmarked graves of long-dead and distant relatives as a way of acknowledging the importance of those ancestors to living descendants.

Another form of attempting to ‘sanctify’ the family is the tendency to view the behaviours and attitudes of our forebears in a positive, sometimes romanticised light, and to tell ennobling rather than dishonourable stories about them. For example, in Australia, those of us who are convict descendants may be motivated to interpret our law-breaking ancestors as victims of cruel circumstance—indeed, as warriors against injustice—rather than as criminals who violated the rights of others, a trend noted by [O’Connor \(2021\)](#) among family historians’ writings about their ancestors with criminal pasts.

The desire to present one’s family history in a positive light is a strong one. In a previous study of hobbyist family historians’ motivations, over 90 per cent of survey respondents agreed with the statement, *I participate in family history research to acknowledge*

*those who came before me* (Moore et al. 2021). From the same study, when responding to open-ended questions about their motivations to explore family history, some mentioned their desire to honour a particular individual, and others felt strongly about the importance of keeping alive the stories and names of their ancestors as a way of acknowledging them. They said things like:

*It only takes a generation and the names of our ancestors can disappear if we don't remember and honour them* (Moore et al. 2021, p. 55)

and

*I want, in at least some small way, to honour those who went before me by telling their stories.* (Moore et al. 2021, p. 55)

Some linked their comments even more directly to spiritual concerns, for example:

[My enjoyment of family history is] *mainly in relation to my Irish ancestors knowing their native place, and then visiting Ireland where I feel a "spiritual connection".* (Moore and Rosenthal 2020)

In fact, there is evidence that 'honouring the ancestors' fosters familial mental health. Studies by Duke and his colleagues showed that sharing positive ancestral stories with family members promotes family cohesion and well-being (e.g., Duke et al. 2003, 2008; Feiler 2013). The stories that contribute most effectively to family well-being are those that emphasise ancestors' resilience; their ability to face setbacks and overcome them. Feiler (2013), in summarising these findings, advises, "If you want a happier family, create, refine and retell the story of your family's positive moments and your ability to bounce back from the difficult ones. That act alone may increase the odds that your family will thrive for many generations to come".

But what if our ancestors were not honourable? What if their lives were 'nasty, brutish and short'? Do we gloss over their tragedies or bad behaviour and romanticise the story? While this moral dilemma has already been discussed in the previous sections relating to care, fairness, loyalty, and authority, it takes on a special meaning in relation to what we hand down to our descendants and how we shape the family narrative. In light of the research above and of our own needs to make sense of the world, each family historian must find their own way to present their family's truth with sensitivity and tact, underlining the sanctity of human life.

## 5. Implications

Haidt has given us a different way of thinking about ethical/moral dilemmas, one that can be applied to the research of family historians. Analysis of hobbyist family historians' comments about the moral dilemmas they have faced and their commitment to family history research suggests emotional responses are common. These emotions (or 'intuitions') are consistent with the categories of moral intuition postulated by Haidt. In many examples listed here, feelings of concern about hurting others ('care') were most strongly evident, but examples were also presented showing the desire to present family histories that are fair to both the living and the dead, to balance loyalty to kin with desire for truth, to follow the rules and etiquette of genealogical research, and to acknowledge and remember those who came before as something of a sacred trust.

If family historians can become, in the words of Rogerson et al. (2011), self-reflective 'devil's advocates' and spend some time processing the feelings and immediate impulses they experience when unearthing unexpected genealogical findings, they are more likely to find satisfactory ways to manage ethical dilemmas they may face. Decisions need to be made about who to contact or not contact, with whom or whether to share information, and how to express one's own needs in ambiguous moral situations. These decisions are best made with a cool head. Haidt's model provides clues as to the most likely kinds of emotions that will occur and helps us understand why we become conflicted. This is a first step to finding a way to proceed.

The pattern of emotions experienced by hobbyist family historians as they face ethical dilemmas may be different from that experienced by professional genealogists. For the most part, professionals will be more detached. It is not their own family whose secrets are potentially being uncovered. Although they may care about their client's feelings, that care will be of a less personal nature than the emotions associated with family bonds. Additionally, well-trained professionals will be clear about 'the rules'—both the professional codes of conduct and the laws associated with their profession—and motivated not to break these guidelines and laws. Their loyalties will be toward giving professional service rather than centred around family reputation. Nevertheless, it is important for professional genealogists to manage their own ethical dilemmas, recognise the potential for (sometimes different) dilemmas among their clients, and find ways to present information and guide clients about how to move forward.

Further steps involve education and support for both professional and hobbyist family historians. As mentioned previously, presenting ancestral stories that incorporate context and multiple perspectives can greatly assist in clarifying the ethical responsibilities of family historians (e.g., [Evans and Lorrison 2023](#); [Heath and Barnwell 2023](#); [Patton et al. 2021](#); [Shaw 2021, 2022](#)). Genealogical societies, groups that provide community education (such as public libraries), and purveyors of genealogical products can—and often do—offer advice, published guidelines, and webinars about how to manage the findings of family history research, including, in some cases, how to deal with ethical dilemmas. Some university courses focus on family history research, and this is a developing area. Many genealogical and family history societies train people for professional accreditation and provide workshops and lectures to help upskill hobbyists, as well as give advice on best practices. Family history-oriented Facebook groups can also be excellent forums for advice and assistance on genealogical moral dilemmas, and they appear to be used frequently for that purpose.

Whether companies selling genealogical products (especially DNA tests) have further responsibilities over and above their 'Terms and Conditions' is an open issue. Many run conferences and webinars, send out newsletters, and disseminate information in a range of ways. Of course, these only have an impact if consumers read them. These companies could also include 'trigger warnings' of one kind or another with their products or, perhaps more usefully, suggest a range of techniques for handling ethical dilemmas in their mailouts and on their websites (e.g., draft emails communicating to others about an unexpected finding).

## 6. Conclusions

Taking a psychological approach to thinking about genealogical ethical dilemmas does not necessarily 'solve' them (if indeed they can be solved), but it does help us understand our own feelings, as well as the feelings or motives of those who behave differently from how we would wish them to. The potential for heightened empathy and creative solutions to genealogical moral dilemmas is likely to be increased if we can be sensitive to others (show care), conduct our interactions with relatives and other family historians with fairness, balance our feelings of family loyalty with our knowledge of historical context, understand the 'rules' of presentation of our family history research, including laws and codes of conduct, and remember that what we are doing as genealogists is, in some ways, a noble exercise of honouring our ancestors through documenting their lives, 'warts and all'.

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