Writing with Sources

A Guide for Students

Third Edition

Gordon Harvey

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1

The Role of Sources

What *is* a source? Almost any record of experience *can* be one, if it can be consulted by others: a painting or video clip or letter, a radio broadcast or blog entry, a review from a defunct magazine or statistics from a weather balloon. It becomes a live source, however, only when it becomes a source *of* something for somebody, when it plays a particular role in a particular scholar's work.

Writing with sources doesn't mean dropping them impressively into your paper, but engaging with them in a way that puts them to work for you. It means—and this is the central point of the book—taking charge. This chapter gives some basic options for doing this—for employing a source as information, opinion, concept, and comparison—by defining your stance toward its implications. The chapter then suggests that sources will work for you most effectively if they are reliable and you can be counted upon to cite them reliably, so your reader can proceed through your argument with trust. Acknowledging your sources fairly, therefore, boosts both your self-respect and your persuasiveness.

1.1 Sources of What?

A source usually provides a paper with one of two things: (1) it provides *factual data* to interpret and use as evidence, or (2) it provides *ideas about* data, to build upon or dissent from. A distinction is sometimes made on this basis between "primary" and "secondary" sources (see Box A). More specifically, a source of factual data usually provides one of the following:

- *exact text* of a written, spoken, or visual composition (such as that provided in a published edition or on an audio or video recording);
- *statistics or measurements* (such as those tabulated or graphed in a research article);
- a *summary record* of an experience (such as that given in an ethnographic report or eyewitness testimony);
- *information* (such as that assembled in a biography or a textbook).

When a source provides a paper with ideas, it is often providing one of the following:

- a particular *claim* made by another writer about the topic you are addressing, along with the reasoning that supports the claim; or
- a general *concept*—a term, theory, or approach—that has appeared in discussion of other topics and that you apply to your own.

Either facts or ideas, finally, may be brought into a paper in the role of a *comparative case*, which illuminates the main case under consideration by similarity or contrast.

But to make use of a source in any of these ways, a writer must define a stance toward it. The three basic stances you can take toward a source are *yes*, *no*, and *sort of*. You can affirm or accept it, and say to it, "*Yes, and so. . . .*" You can reject or disagree, and say to it, "*No, rather. . . .*" Or you can qualify or modify the source, and say to it, "*Yes, but . . . ,*" "*Yes, except . . . ,*" or "*Yes, if. . . .*"

Your stance toward a source of factual data will often be one of acceptance, although you may call into question the completeness or accuracy of provided facts; your stance toward sources of ideas will vary. All scholars, in making their contribution to the larger understanding of a subject, accept and build on the work of others, but they often discover where their contribution lies through reasoned disagreement with and qualification of that work.

A student writer, Jeff, having done much reading for a term paper on the Civil War, has sketched out the following proposal to organize his thoughts. ***Italicized*** words suggest what a source will be a source of; **CAPITALIZED** words suggest the stance that Jeff will take toward it:

> The ***claim*** of many historians that the North won the war with greater manpower and resources is true, **BUT** such a large event has many contributing causes. Linn and others have ***proposed*** that Lincoln's leadership was crucial. I will **SUPPORT** this ***view*** **BUT** argue that a particularly influential and underestimated aspect of that leadership was his skill at crafting memorable speeches on key occasions to give immediacy to abstract ideals.

As the italicized words indicate, some of the articles that Jeff has read will provide this argument with claims (*proposals*, *views*) about why the North won. Toward these claims, as the capitalized words suggest, Jeff's stance in his paper will be "*Yes, but.*" He won't try, wisely, to refute outright a scholarly consensus about material resources, but rather will qualify the importance claimed for them. Likewise, Jeff will modify the claims made for the importance of Lincoln's leadership by focusing on a specific aspect that he thinks deserves more notice.

These moves of qualifying and modifying will provide the motive for Jeff's paper. In the rest of his proposal, again, ***italicized*** words indicate what his sources will be sources of, and **CAPITALIZED** words indicate the stance Jeff will take toward them:

I first **ACKNOWLEDGE** the importance of the North's material resources in the outcome of the war, citing statistical ***data***. **BUT** I then give ***examples*** of cases where inspiring leadership influenced military outcomes in the face of resources. Referring especially to the ***example*** of Churchill's galvanizing speeches in WWII, I invoke Simmons's **USEFUL *notion*** of "rhetorical turning points." I ***compare*** Lincoln's situation to Churchill's and note the ***fact*** that he **TOO** at key points in a war came up with striking and stirring phrases to unify his audience.

I then analyze the ***details*** of several Lincoln speeches to show how he creates "moral vividness" (in the linguist Denby's **APT *term***) by finding the right metaphors for the occasion. I trace the effect of his words by analyzing the ***report*** of the speeches in subsequent newspaper accounts. I ***contrast*** these speeches with speeches given by the Southern leader Jefferson Davis that, in a similar situation, do **NOT** have the same effect.

To **REFUTE** a possible objection to my argument, I address the ***claim*** implied in several popular accounts of Lincoln's life that his skill at speaking was not crafted responding to a particular situation but a natural product of his simple and direct personality. I ***compare*** the ***texts*** of early speeches and speeches in draft form to the **QUITE DIFFERENT** speeches Lincoln later gave, to show that he worked deliberately to create his effects. I **DRAW UPON *evidence*** of his letters and conversations to show that he was aware of the historic work that his speeches had to do.

Some of the works that Jeff has read will provide his paper with factual data, as indicated by the words *report, details, texts, evidence,* and *fact*. They will document the fact that Lincoln did give speeches at key junctures, what exactly Lincoln said and wrote, what concerns were on his mind at the time, and what impact the speeches had. Accepting the accuracy of these sources, Jeff's stance will be *"Yes, and so."* He will say *"Yes, and so"* also to the applicability of certain general concepts: Simmons's *useful notion* and Denby's *apt term*. And finally, some of Jeff's sources will provide comparative cases. He accepts the fundamental comparability of Churchill's situation to Lincoln's, saying *"Yes, and so."* He denies the comparability of Davis's speeches to Lincoln's (*"No, rather"*) and of Lincoln's drafts with his delivered speeches; and he will use the latter contrast to refute the claim that Lincoln's speeches emerged naturally from a homespun character.[1]

These source roles are common in scholarly writing of all kinds and to all kinds of student assignments. Shorter assignments may invite you to work with only one of these source roles. You may be asked to analyze a piece of complex textual data (e.g., argument, poem, novel, film), to agree or disagree with a given claim, to apply a general theory to a particular case, or to compare two works or how two theories apply to a case.

Longer assignments, for which you may be required to define your own issue and find your own sources, expect you to use those sources in whatever ways are required to make a

1. Writing out this kind of source plan can be useful. It's just a proposal, but writing it forces Jeff to bring his sources into a purposeful order, based on his own thinking, and allows him to move forward. His plan may turn out to be too ambitious: he may find he lacks enough information to attribute a precise impact to speeches. Rather than taking on directly the large issue of what won the war, he may end up focusing (as good papers often do) on the workings of one or two primary documents—speeches and letters—in the *context* of the large issue. But because he has sketched a plan in advance, the difficulties will become apparent early—to Jeff himself or to others with whom he shares his plan (see section 3.4 #9).

persuasive case for your way of looking at the material. Since you will be relatively new to the field in question and can't possibly know all the scholarship, that way of looking isn't expected to be completely new, but it is expected that you'll put sources together in your own way, or use them to say something of your own, not just repeat them.

[A] "PRIMARY" AND "SECONDARY" SOURCES

Sources called "primary" generally appear in papers as sources of uninterpreted factual data, and those called "secondary" as sources of interpretive ideas; but keep in mind two cautions.

First, although a source may be categorized as primary or secondary as it sits on a shelf or in a database, it can often be used as primary in one situation and secondary in another. An article that offers a new interpretation of *Hamlet* would be a secondary source if you were writing a paper on the meaning of that play; if you were writing about a new style in writing literary criticism, the same article would be primary data for you to analyze and use as evidence.

Second, the use of the terms *primary* and *secondary* differs across disciplines. Usage in the humanities and fields primarily studying texts follows the basic distinction above. In the empirical sciences, however, *primary sources* are research articles that provide new data but also offer an interpretation of that data. A *secondary source* is an article that summarizes and reviews data from previous research articles, and may or may not offer new interpretations. Because interpretations change rapidly as more data is collected, however, research articles in the sciences do tend to be cited by other papers more often for their results than for their interpretations.

1.2 Citing Reliable Sources

The persuasiveness of a scholarly paper depends on a persuasive deployment of sources in clear roles, but it also depends on the reliability of the sources being deployed. Suppose Jeff's sources for his paper on Lincoln had turned out to be these:

- for the prevailing view of what won the war: a Confederate War re-enactors website and a student report posted on a personal website;
- for the facts of Lincoln's life and speaking occasions: websites of the Honest Abe Society, a Pennsylvania Battlefield Tours website, and a Wikipedia article;
- for early drafts of Lincoln's speeches: a typed handout from Jeff's high school debate class;
- for Davis's speeches: Internet excerpts from an 1880 edition edited by Davis's cousin;
- for his account of Churchill and historical turning points: a summary of Simmons's book in *Time* magazine, a page called "Speaking to Win" on leadership .com, and a year-old blog.

These sources, neither written nor checked by authorities in the field, out-of-date in some cases and impossible to consult in other cases, are likely to be inaccurate or at best incomplete in their accounts. And they will be variously influenced by regional bias, by the profit motive, and by a need to be brief and breezy for a popular audience.

A scholarly reader of Jeff's argument would feel let down. Scholarly readers are students or teachers of a subject who seek to understand it and to base their understanding on strong demonstrations. They expect scholarly writers, even writers relatively new to the topic, to be similarly serious seekers. They expect them at least to use the time and the resources at their disposal *as* scholars to make the strongest case they can. This means taking the time to find and use sources that can be

trusted to provide full, accurate, and unbiased material and thus provide a stable ground for demonstration. The paper imagined above suggests no serious effort in this regard, but only a quick Google search.

It isn't always easy to know, when you're new to a scholarly field, which sources are serious. But learning to assess the source of one's information, ideas, and attitudes is part of an education in critical thinking. This assessing habit has become all the more useful now that so much information, and so many ideas and implicit attitudes, are being assembled, packaged, and repackaged on the Internet.

You can take your initial cue, in assessing sources, from the kinds of sources that are assigned as readings in your classes:

- standard, up-to-date editions of texts (the editions used in current articles in the field, whose bibliographies can also be used to determine which books and articles are currently important);
- scholarly articles—not from popular magazines but from journals whose contents have been assessed by scholars in the field, which therefore reflect ideas that the field takes seriously and that handle sources carefully;
- compilations of data—historical, biographical, and statistical—that reflect the current state of knowledge in a field.

Sources such as these, which can be trusted to provide accurately the information and ideas they offer to provide, are readily available to members of a scholarly community (see Box B). And their notes and references are better starting points for finding other sources than a Google search.

It's not the case that anything written for a popular audience, rather than an academic one, should be distrusted. Because such works are often both lively *and* reliable, they do appear on college syllabi. Nor is it always unacceptable, when working on a paper, to see what a general web search turns up. Even professors do this—Google a topic, for example, and

visit Wikipedia—as a first pass or to get basic or tangential information.

Their actual papers, however, do not depend on the result of casual searches, and neither should you. Doing so increases your risk not only of plagiarizing (see Chapter 3), but also of making factual errors. A general Google search (as opposed to one in Google Scholar, say) brings before you as many unreliable sources as reliable ones and puts you in the position of having to tell them apart in short order, which you may not yet know enough about the field to do. The fact that a website gets many hits or has multiple links is no guarantee that its information is reliable.

[B] ASSESSING INTERNET SOURCES

The best way to locate reliable sources is to go through a website of a scholarly library that gives you access to databases, indices, texts of abstracts and journals, collections of statistics, maps, paintings and photographs, and many other resources, often organized by field. Electronic sources available through these library portals are chosen for scholarly authority and reliability. Instructions linked to the library portal page show you how to first find the sources best suited for your search and then how to best search them for the information you want.

Generally, use websites and other non-journal and nonbook materials from the Internet only to supplement other sources. When you do use them,

- Give priority to those that list their sources (so you can verify the information) or at least list an advisory board of professionals who vet the material.
- If the site doesn't list its sources but still seems serious (i.e., shows no breeziness, carelessness, or bias,

and isn't a commercial [*.com*] site), check out the author's professional position and what else he or she has written, and whether the site has a respectable institutional base or is an outgrowth of a long-standing professional organization. You can also directly e-mail the author about the status of a particular piece of information—or post a query.

- Don't use as a source a site that gives no author or supervisory editor.
- When the text on a site is subject to change or erasure, and thus may not be consultable by other readers, try to find a more stable source for the information. If you must use it, either print out the text or have the author send it to you as a personal communication—which you can then cite as such and attach to your paper as an appendix.

If you include non-journal Internet sources in your paper and you have, or think your reader may have, concerns about their reliability or verifiability, include an explanatory note (see section 2.5).

1.3 Citing Sources Reliably

However reliable your sources may be, your reader must be able to *see* that they're reliable and trust that you are acknowledging them reliably—that you are reliably making clear what comes from you and what comes from your sources. You show this by citing, making a notation in your paper that refers to publication information you provide elsewhere (common methods are described in Chapter 4).

But what constitutes reliability in citing? When should you cite—and why? You should cite on the following occasions:

(a) ***Whenever you use factual material—e.g., data, information, testimony, or a report—that you found in a source.*** You need to make clear to your readers *who* gathered the information and *where* to find its original form. Even if these matters are common knowledge in the field, if *your* knowledge of them isn't firsthand, your readers need to know where your version of the facts came from.

(b) ***Whenever you use ideas—e.g., claims, interpretations, conclusions, or lines of reasoning—arrived at by another person,*** so your readers know that you are summarizing thoughts formulated by someone else, whose authority your citation invokes, and whose formulations readers can consult and check against your summary.

(c) ***Whenever you use a special concept, term, or theory that you found in a source.***

(d) ***Whenever you make use of a source passage's distinctive structure, organizing strategy, or method,*** such as the way an argument is divided into distinct parts, sections, or kinds; the way a distinction is made between two aspects of a problem; or a new procedure for studying some phenomenon (in a text, in the laboratory, or in the field) that was developed by a particular person or group. Citing tells your readers that the strategy or method isn't yours and allows them to consult its original context.

(e) ***Whenever you quote verbatim.*** When you cite a passage of two or more words in a row, or even a single word (a characterization or label, for example) that is distinctive or striking. Your readers need to be able to verify the accuracy and context of your quotation, and to credit the author of the source for crafting the exact formulation. Words you use verbatim from a source must be put in quotation marks, even if you use only two or three words; it's not enough simply to cite. (If you go on to use the quoted word or phrase repeatedly in your paper, as part of your analytic vocabulary, you don't need to cite it each subsequent time; however, you do need to attribute the terms at the outset.)

You should cite for all of these occasions, even in situations that may seem to you nonstandard. The rules apply, that is, to

- **all uses of sources:** including summaries and paraphrases, even where the source provides only "background" information to your argument (such as historical context or a survey of previous work done);
- **all types of assignments:** including problem sets, computer programs, lab and other reports, collaborative projects, and take-home exams (the fact that your instructor may recognize your use of a course text doesn't change the need to acknowledge it);
- **all types of sources and media:** including numbers, images, graphs and charts, oral communications, films and videos; media including Internet and databases, class sourcebooks and class texts, and lectures.[2]

Finally, although you aren't required to mention the help you have received informally, acknowledging such help is a generous and honest gesture and a good habit to develop (see Box C).

1.4 Why Cite?

Why cite so scrupulously? The consequences of discovered plagiarism (see section 3.1) are to be avoided, obviously, but doesn't frequent citation weaken a paper by making you seem less thoughtful and too dependent on others? Yes, if you find yourself citing sources for almost everything in your paper or even for entire paragraphs, you have a problem. You may be citing "common knowledge" (see Box D) or citing inefficiently (see Box O); or, more likely, you're giving too much rehash of other people's ideas and need to generate more of your own—you need to step beyond your sources. But once you have a case to make, careful citing is at once a service, a moral obligation, and an argumentative advantage.

Your citation says several things to your readers. For one, it says, *"Here is where I found this idea, these words, or this information. Here you can verify the summary of the idea I am giving you or find the full context for the words I have paraphrased or quoted—in case you wish to check them or pursue the matter yourself."* Your citation allows your readers to find in a source what you have found and to make use of it themselves. Such readers are

2. A lecture is a carefully constructed presentation by an authority in the field, and may itself draw on other authorities; thus, you should cite if you use a distinctive idea, phrase, or piece of information from a lecture. Some instructors may want you to regard their lectures, given for the purposes of their class only, as common knowledge not to be cited. Ask about this before incorporating lecture material.

[C] ACKNOWLEDGING UNCITED SOURCES

Whenever you write a paper of more than a few pages, you draw on many influences: not only sources you can cite as sources of something definite, but also less immediate, less definite sources, such as the lessons of former teachers, conversations or e-mails with friends, class discussions, or an inspiring book you read over the summer. When you have benefited substantially from ideas in sources like these that won't appear in your list of references, you should acknowledge them in a footnote or endnote (see section 2.5). Doing so shows you to be both generous and intellectually self-aware.

Remember, however, that your sources may themselves be using phrases and ideas from their reading or lectures. If you write a paper that depends *heavily* on an idea you heard in conversation with someone, you should check with that person about the source of the idea. Also be aware that no instructor will appreciate your incorporating his or her ideas from conversation verbatim into your paper, but will rather expect you to express the ideas in your own way and to develop them.

particularly grateful to have it made clear, moreover, exactly what in your paper comes from the source and what comes from you.

Your citation also says, *"This person deserves the credit for gathering these materials together or for coming up with these thoughts or words; I hereby acknowledge my indebtedness."* Saying this is only fair to the author in question. Life is short, and he or she has spent many precious hours and days working out the ideas and words that you are casually perusing, assuming that he or she would be fairly credited for them. If you don't credit the author for this work, you implicitly credit yourself for it. If you credit vaguely or sloppily, you create confusion in the minds of others as to what the scholar has accomplished, probably in the process making the accomplishment seem less than it is.

Citing is only fair, also, to the community of students and teachers of which you are a part. It is only fair to other students in your class who fairly acknowledge any help they get from sources. It is only fair to your instructors, who agree to take your ideas seriously—even when they are uninformed and fragmentary—so long as you take the scholarly process seriously by taking yourself seriously as a thinker and as a potential source for other thinkers. When you pretend to have thought or written something that you haven't, you aren't honoring the bargain, and you are treating the process as a game.

Being helpful and fair in your citing also makes your argument stronger. When you analyze data or text from a source, your citation says, *"This scholar has collected the material I'm working with (as you can verify); it's a reliable basis for my conclusions."* When you support or build on a source's idea, it says, *"These learned scholars have found this to be so; it's not just my idiosyncratic opinion or blithe assumption."* When you challenge an idea, it says, *"This learned scholar has this view, as you can verify for yourself. I am not taking on a fool, or creating a straw man."* Citing not only gets you credit for having read these scholars; it also makes your own contribution stand out against the contributions of others—others whose company elevates you.

Reliable citing strengthens your paper, finally, by manifesting intellectual character. It establishes you as not just honest but also helpful, open and generous, serious, careful, and confident enough in your own thinking and reading, and in the intellectual process, to give credit where it is due—to acknowledge other views. Intermittent, casual, sloppy, or vague citing raises suspicion and makes your readers skeptical; ready and consistent citing puts your readers in a generous state of mind, willing to notice and give *you* full credit for the thinking you have done.

[D] "COMMON KNOWLEDGE"

Unless you are closely studying it, you don't need to cite a phrase like "all the world's a stage" or "life, liberty, and the pursuit of happiness." These are common locutions, known to all educated readers. Nor do you need to cite information that is either familiar to educated readers or easily available in many general sources (such as encyclopedias, dictionaries, and basic textbooks). The date of Lincoln's Gettysburg Address, the distance to Saturn, the structure of the American Congress, the date of birth of the discoverer of DNA, the fact that Sigmund Freud developed such ideas as the unconscious and the Oedipus complex—such information, in its basic form, is widely accepted and not based on a particular interpretation or point of view; it counts as common knowledge. In the paper excerpted on p. 23, Jennie doesn't need to cite her passing references to the notion of "oral fixation" (line 6) or the fact that gentlemen used to have an after-dinner cigar separate from the ladies (lines 40–41).

The line between common and uncommon knowledge isn't always clear, but it is your responsibility to take care that an assumption of common knowledge doesn't lead you into plagiarism. If Jennie had gone on

to say that the after-dinner cigar ritual occurred even in matriarchal societies—an unfamiliar idea brought to light by the work of certain scholars—she would have needed to cite a source, both to show that the idea has a solid basis and to credit those scholars. If Jennie's argument had mentioned particular aspects of Freud's fixation theory, details that aren't familiar to most readers, she would have needed to cite Freud (or the source for her account of his theory). She would have needed to cite in this paper written for her ethics class, even though the details of Freud's theory *had* been common knowledge in the psychology seminar she took the previous semester. Ideas that are common knowledge in one academic field are often not in other fields. When in doubt on this score, ask—or cite anyway, to be safe.

Note, finally, that when you draw a *great deal* of information from any single source, you should cite that source even if the information is common knowledge, since the source (and its particular way of organizing the information) has made a significant contribution to your paper.

2

Integrating Sources

Having used reliable sources to help you discover and variously support your argument, and having cited these reliably, you may still have work to do to take full charge of your project, and to maintain your reader's good will and trust.

Whenever you use a source in a paper, you must determine, first, what *form* it should take to be most helpful and efficient (be that summary, paraphrase, mention, citation, or exact replication); second, whether you've made clear enough to your reader (however obvious it may be to you) exactly how your source bears on your argument; and third, whether you've also made clear to your reader when the source is speaking and when you are.

This chapter explains how to meet these responsibilities. It also describes the special techniques involved in directly quoting a source, and in thanking those who, though not technically sources, have provided you with relevant conversation, inspiration, or moral support.

2.1 Ways of Bringing a Source In

At any given point in your paper, a source will appear in one of a few basic forms. You will summarize or paraphrase its main ideas or findings, give its gist, or simply mention it in passing. Or you will reproduce parts of the source exactly, by replication or quotation.

(a) ***Summary:*** Here, you reduce a source text to its main point and aspects, using your own words but sometimes including quoted words or phrases from the source. When writing an essay about plagiarism in American universities, for example, you might summarize section 1.1 of this book as follows:

> The same source, Harvey notes, can play different roles in different situations, depending on a writer's purposes. He thus suggests that sources are best described by "what they are sources of" in a paper (data and ideas of different kinds) and what stance a writer takes toward them (accepting, rejecting, or qualifying).[1]

Note that this style of citation refers your reader to a footnote (see section 4.2) that gives the relevant pages in the source, this book. You will usually be summarizing longer texts than this—whole chapters, articles, or books—so the key requirement, that a summary be concise but accurate, will present a greater challenge. Two further requirements of summarizing are that you make clear whom or what you are summarizing (*Harvey notes*) and that you put your summary in your own words, except for phrases you place in quotation marks (or words in the source that have no real synonyms). This means that, to avoid plagiarizing, your summary must recast both the language *and* the sentence structure of the source.

(b) ***Paraphrase:*** Here, with the same requirements in force, your encapsulation follows more closely the source's particular order of presentation or reasoning:

> Sources, Harvey suggests, are best described by the role they play in particular papers. This is a matter both of the kind of material that a source is offering and of what attitude or "stance" a writer takes toward it. While some sources tend to offer mainly factual material, including exact wording, statistics, testimony, and information, others provide ideas, including claims and concepts. Writer stances, he notes, tend to be accepting, rejecting, or qualifying (Harvey 3).

Note that this citation uses in-text, author-page style (see section 4.3). You should encapsulate by paraphrase, rather than summary, when the particular logic or order of a source's presentation is important to your argument. You will sometimes need to paraphrase not to encapsulate a long text, but to clarify a single pithy or difficult statement or concept. Such interpretive or explanatory paraphrasing, especially useful when writing about artistic or philosophical texts, will usually be longer than what it paraphrases. Unpacking the meaning of the short saying used later in this book, to take a trivial example, you might paraphrase thus:

> On this point Harvey invokes the proverb that "a stitch in time saves nine," by which he seems to mean that a step taken early to address a worsening situation will prevent the need for more difficult and elaborate action later on (48).

Your citation refers your reader to the page on which the saying is found, your sentence having made clear with the words *he seems to mean* that the paraphrase is your own.

(c) ***Gist:*** Here, you give only the main claim or thrust of a work or argument—in a sentence or so—without indicating many or any of its aspects or reasons. To give the gist of section 1.1 above, you might say that

> Harvey suggests that sources are best described by which one of a few basic roles they play in a given paper (2017).

Note that this citation and those in the following examples illustrate in-text author-year style (see section 4.4).

(d) ***Mention:*** Here, you refer to the source in passing, invoking it as part of a general characterization:

> Some analysts, such as Harvey, stress the roles that different sources play (2017).

(e) ***Citation Only:*** Here, you relegate the name of the source to a parenthetical citation or footnote:

> Still other analysts see the roles that sources play as the determining factor (Harvey, 2017).

[E] MENTIONING A TITLE IN YOUR PAPER

Italicize the title of a book (as in line 10 of Jennie's paper on p. 23) or collection, journal or newspaper, play, long poem, film, musical composition, or artwork. Put in quotation marks the title of an individual article, chapter, essay, story, or poem. Don't italicize the Bible or its books, or legal documents like the Constitution. For an italicized title that contains another title, indicate the latter by underlining (*The Making of* <u>*The Origin of Species*</u>) or by un-italicizing (*The Making of* The Origin of Species).

(f) ***Exact reproduction:*** Here, you replicate exactly an element of another source, such as a data table or a figure (e.g., a chart, graph, diagram, or map), or you quote exactly the words of the source, or, in an online paper, provide a link to the work in question (which you still must cite). Reasons to quote a source directly include the following:

- The source author has made a point so clearly and concisely that it can't be expressed any better.
- A certain phrase or sentence in the source is particularly vivid or striking, or especially typical or representative of some phenomenon you are discussing.
- An important passage is sufficiently difficult, dense, or rich that it requires you to analyze it closely, which in turn requires that the passage be produced so the reader can follow your analysis.
- A claim you are making is such that the doubting reader will want to hear exactly what the source said. This will often be the case when you criticize or disagree with a source; your reader wants to feel sure you aren't misrepresenting the source—or creating a straw man (or woman). In addition, you need to quote *enough* of the source so that the context and meaning are clear.

2.2 Three Basic Principles

Depending on the academic field, sources appear in some of the above forms more frequently than in others. Direct quotation, for example, is all but essential in literary papers, but is rare in the sciences and data-based social sciences. Three basic principles, however, should govern your thinking about how sources appear in any paper.

FIRST PRINCIPLE: ***Use sources as concisely as possible, so your own thinking isn't crowded out by your presentation of other people's thinking and your own voice lost in your quoting of other voices.*** This means that you should mention or summarize your source, perhaps quoting a vivid phrase or two, unless you have a good reason to paraphrase closely or quote more extensively.

SECOND PRINCIPLE: ***Never leave your reader in doubt as to when you are speaking and when you are relying on material from a source.*** Avoid ambiguity by (a) citing the source immediately after drawing on it, but also (if discussing the source or quoting it directly) by (b) announcing the source in your own sentence or phrases preceding its appearance and, for extensive quotation, by (c) following up its appearance with commentary about it or development from it that makes clear where your contribution starts, referring back to the source by name (*Compton's comment is questionable in several ways . . .*). Although you need not restate the name of your source where it's obvious, if your summary of it continues for many sentences you should remind your reader that you are still summarizing, not interpreting or developing.

You need not give the name or names of a source in advance when you merely mention it but don't quote it or discuss it at length (see the use of Bell, Schmidt, and Wills in the following excerpt). Be careful, however, that your citation doesn't come so late in your paragraph that it creates ambiguity about which ideas are yours and which are the source's.

THIRD PRINCIPLE: ***Always make clear how each source you introduce into your paper relates to your argument.*** This means indicating to your reader, in the words leading up to your summary, paraphrase, or quotation of a source, or in the sentences that follow and reflect on it (or both), what you want your reader to notice or focus on in the source and what your stance toward it is (see section 1.1 above and 2.3d below).

Notice how a student writer, Jennie, observes these three principles in this excerpt from a paper about why people engage in self-destructive behaviors like smoking and drinking:

Scientists distinguish between "proximate" and "ultimate" explanations (Bell 600). An ultimate, long-range explanation of smoking, based on a study of human evolution, has greater appeal for many people than a more localized, proximate explanation - like chemical changes in the body or an oral fixation. But ultimate explanations may conflict with proximate evidence that seems more obvious, as does the explanation proposed by physiologist Jared Diamond in his recent book *The Third Chimpanzee*. Diamond cites the theory of zoologist Amotz Zahavi that self-endangering behaviors in animals (such as a male bird displaying a big tail and a loud song to a female) may be at once a signal and a proof of superior powers (196). Such a bird has proved, writes Diamond, "that he must be especially good at escaping predators, finding food, resisting disease; the bigger the handicap, the more rigorous the test he has passed." Humans share the same instinct that makes birds give dangerous displays, he suggests; and risky human actions, including the use of drugs, are designed to impress potential mates and competitors in the way Zahavi suggests risky animal actions are (198). Diamond's characterization of the message that teenagers send by smoking and drinking creates an image of a strutting animal:

> I'm strong and I'm superior. Even to take drugs once or twice, I must be strong enough to get past the burning, choking sensation of my first puff on a cigarette, or to get past the misery of my first hangover. To do it chronically and remain alive and healthy, I must be superior. (199)

An apparent problem with this ultimate, evolutionary explanation of smoking, however, is that people were smoking long before they knew it was dangerous, before they knew that doing it chronically made it harder to "remain alive and healthy." Public concern about smoking did not appear until the 1950s (Schmidt 29). Before that, moreover, many people smoked in private – removed from potential mates they might impress; men had a quiet pipe by the fire or actually left the ladies (or the ladies left them) to have a cigar after dinner. Finally, Native American peoples smoked tobacco for centuries, apparently for its pleasantly elevating effect (Wills 77).

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In terms of the source roles mentioned in section 1.1, this excerpt breaks down as follows: Bell provides Jennie with a general concept (a distinction between types of explanation), which she accepts and applies to her own topic; Diamond provides her with a claim and an argument, which she rejects; and Schmidt and Wills provide her with information that she accepts as factual and as providing support for her claims that concern about smoking is recent and that Native Americans smoked tobacco for its pleasant effect. Later in the paper she uses, as sources of primary text, interviews she conducted with adolescents about their first smoking and drinking experiences.

In each case, Jennie uses her sources concisely and clearly. She summarizes, in passing, Bell's conceptual distinction. She reduces Diamond's 10-page argument about smoking and drinking to a few sentences and short quotations, and she merely refers her readers to Schmidt and Wills. She makes clear the relevance of the summary of Diamond to her argument in the sentence at lines 6–8 that leads up to the summary, providing an argumentative context for it (*But ultimate explanations may conflict with proximate evidence*) and then again by explicitly discussing the summarized material in the sentences following the quotation (*An apparent problem with this ultimate, evolutionary explanation*). Because her summary of Diamond continues for several lines, she reminds the reader at the beginning of line 20 (*he suggests*) that she is still summarizing. She also has been careful to paraphrase at those times in her summary when she may have been tempted merely to repeat her source's words. She paraphrases this sentence in Diamond's book:

> It seems to me that Zahavi's theory applies to many costly or dangerous human behaviors aimed at achieving status in general or at sexual benefits in particular.

And her paraphrase, at lines 20–23, differs from Diamond in both language and sentence structure:

> risky human actions, including the use of drugs, are designed to impress potential mates and competitors in the way Zahavi suggests risky animal actions are (198).

Jennie's paragraph also illustrates one further rule: ***mention the nature or professional status of your source if it's distinctive.*** Don't denote a source in a psychology paper as "psychologist Anne Smith" or in a literature paper as "literary critic Wayne Booth." But do mention professional qualification, especially where you are quoting, when it isn't apparent from the nature of the course or paper—as Jennie does, in this paper for an ethics course, when she uses a physiologist and a zoologist (lines 9–11). Additionally, do describe the nature of a source that is especially authoritative or distinctive—if it's the seminal article or standard biography, for example, or an especially famous or recent study, or by the leading expert or a firsthand witness.

[F] INDIRECT QUOTING AND CITING SUMMARIES

When you haven't actually read the original source, cite the passage as "quoted in" or "cited in" the source in which you found it—both to credit that scholar for finding the quoted passage or cited text, and to protect yourself in case he or she has misquoted, quoted out of context, or otherwise misrepresented. Also, ***cite a summary account*** of a text or a topic provided by another source, but use such an account only when that source is a scholarly one (see section 1.2); don't rely on a summary of an academic article or theory, for example, or of a historical phenomenon, that you find on the website of an advocacy group. And always read for yourself any source that's crucial to your argument, rather than relying on a summary.

2.3 Rules for Quoting

For both quotations that you embed in your own sentences and quotations that you quote as indented blocks, observe these general rules:

(a) ***Quote only what you need or is really striking.*** If you quote too much, you may convey the impression that you haven't digested the material or that you are merely padding the length of your paper. Whenever possible, keep your quotations short enough to embed gracefully in one of your own sentences. Don't quote lazily; where you are tempted to reproduce a long passage of several sentences, see if you can quote instead a few of its key phrases and link them with a concise summary.

(b) ***Quote verbatim,*** carefully double-checking the source after you write or type the words even if you have pasted in the quotation (texts can get jumbled in electronic transmission). Quote verbatim even if the source passage itself is misspelled or ungrammatical, indicating this by adding in brackets after the problematic word or phrase the italicized Latin word *[sic]*, meaning "thus": Hemingway wrote that his editor "had a verry *[sic]* nice time at the bar." See Box H for the few minor exceptions to the rule of verbatim quotation.

(c) ***Construct your own sentence so the quotation fits smoothly into it.*** Jennie has done this at lines 15–18: *Such a bird has proved, writes Diamond, "that he must be especially good at escaping predators, finding food, resisting disease; the bigger the handicap, the more rigorous the test he has passed."* She has done this again, in a different way, at line 25, where she ends her announcing sentence with a colon and follows immediately with the quotation. (See Box G.)

(d) ***Usually announce a quotation in the words preceding it*** (as Jennie does in line 15 with *writes Diamond*) so your readers enter the quoted passage knowing who will be speaking and what they are listening for in the passage and won't have to reread the passage in light of this information. See 2.4a.

Withholding the identity of a quoted source until a citation at the end of the quotation is acceptable only when the identity of a quoted source is much less important than, or a distraction from, what the source says. This might be the case, for example, if you were giving a quick sampling of opinion—say, in a history paper, giving a series of short quotations illustrating a common belief in the divine right of kings, or in an English paper, quoting from a few representative early reviews of Walt Whitman.

(e) ***Choose your announcing verb carefully.*** Don't say "Diamond *states*," for example, unless you mean to imply a deliberate pronouncement, to be scrutinized like the wording of a statute or a biblical commandment. Choose rather a more neutral verb ("writes," "says," "observes," "suggests," "remarks," "argues") or a verb that catches exactly the attitude you want to convey ("laments," "protests," "charges," "replies," "admits," "claims," "objects"). Choose verbs carefully when summarizing and paraphrasing sources as well.

(f) ***Don't automatically put a comma before a quotation,*** as you do in writing dialogue. Do so only if the grammar of your sentence requires it (as Jennie's sentence at line 15, p. 23 does, whereas her sentence at line 36 does not).

(g) ***Put the period or comma ending a sentence or clause after the parenthetical citation,*** except after a block quotation (see section 2.4f).

(h) ***Indicate clearly when you are quoting a passage*** as you found it quoted in another source (see Box F).

[G] LINK QUOTATION AND INTERPRETATION CONCISELY

1. The colon + quotation technique for announcing (see 2.3c) can also be used to avoid extra words when setting up or drawing out the significance of an embedded quotation. Instead of putting a quotation and its interpretation in separate sentences,

   > *Here the poet becomes self-mocking. He writes, "Oh, woe is me."*

   or linking the two with a signal-word participle like "writing," "saying," or "exclaiming,"

   > *Here the poet becomes self-mocking, writing, "Oh, woe is me."*

   you can sometimes more succinctly use the colon alone:

   > *Here the poet becomes self-mocking: "Oh, woe is me."*

2. Quoted evidence can sometimes be neatly tucked inside an interpretive sentence, by means of parentheses, if the quotation is brief and its import clear. Instead of a choppy construction like this,

   > *The speaker knows that both paths are equally worn. He writes, "The passing there / Had worn them really about the same." He thus has chosen his future by whim.*

   you may be able to insert the quotation in-between the interpretive elements:

   > *The speaker knows that both paths are equally worn ("The passing there / Had worn them really about the same") and thus that he has chosen his future by whim.*

   The parenthetical technique is used in this text in the second sentence of section 2.4 below, p. 29.

2.4 Quoting Blocks

If you need to quote more than four lines of prose or two verses of poetry, indent the passage as a block. Jennie does this when she quotes three consecutive sentences of Diamond's book at line 26 (*"I'm strong and I'm superior"*) that give a particularly vivid statement of Diamond's theory. Doing this makes her paper more persuasive by giving her criticisms a specific focus, and it reassures readers that she is not misrepresenting Diamond by selecting a few weak or misleading phrases.

Quote a block only when you will consider closely the language of your source—for example, when discussing a speech by Lincoln, an argument by Kant, an eyewitness account of a revolution, or a key policy statement, but rarely in a science or social science paper—and only when you will follow up your quotation with some commentary on it. Otherwise, long passages of other people's voices will drown out your own voice and will take up space that you should be devoting to your own ideas. The basic rules for quoting blocks are as follows:

(a) ***Tell your readers in advance who is about to speak and what to listen for.*** Don't send them unguided through a long stretch of someone else's words. Notice how Jennie sets up the block quotation in lines 23–25, telling us beforehand both what we will be listening to and what we should listen for: *Diamond's characterization of the message that human teenagers send by smoking and drinking creates an image of a strutting animal.*

(b) ***Usually construct your lead-in sentence so that it ends with a colon***—pointing the reader ahead (as Jennie does at line 25, on p. 23) to the quotation itself. Occasionally, clarity or momentum may be better served by having your lead-in sentence run directly into your quotation, in which case you may require a comma or no punctuation at all. But this should be the exception, not the rule.

(c) ***Indent all lines 10 spaces (or 1") from the left margin,*** to distinguish a block from a paragraph break. Single-space the block, to distinguish it further from the rest of the text, unless your instructor prefers double-spaced blocks (as do many publications for manuscript submissions).

(d) ***Don't put an indented block in quotation marks;*** the indenting replaces quotation marks. Use quotation marks in an indented block only where the source author is quoting or is reporting spoken words (as when Homer reports Achilles's funeral oration in the *Iliad*).

(e) ***Follow up a block quotation with commentary that reflects on it and makes clear why you needed to quote it.*** Your follow-up—unless you have discussed the quotation in the sentences leading up to it—should usually be a few sentences long, and it should generally involve repeating or echoing the language of the quotation itself, as you draw out its significance. Any quotation, like any fact, is only as good as what you make of it. After her block quotation of Diamond, Jennie follows up at length, echoing the language of the quotation (*"remain alive and healthy,"* line 36, p. 23) in her analysis of it. Another way to state this rule would be to ***avoid ending a paragraph on a block quotation.*** End with follow-up commentary that pulls your reader out of the quotation and back into your own argument about the quoted material.

(f) ***When using an in-text, parenthetic system of citation, put your citation of a block quotation outside the period at the end of the last sentence quoted.*** This makes clear that the citation applies to the whole block, not only to the last sentence quoted. Note that the citation (*199*) comes at the end of the block quotation in line 31 of Jennie's paper (p. 23).

[H] FITTING QUOTATIONS TO CONTEXT AND USING ELLIPSIS

There are a few cases in which you may need to adjust a quoted passage, in a very minor way, to fit its context in your paper.

(1) **To punctuate the end** of an embedded quotation, use whatever punctuation your sentence requires, not the source author's punctuation. In Jennie's sentence at lines 15–18, Diamond may or may not end his sentence after "passed"; however, since Jennie ends her own sentence there, she uses a period. ***Put a period or comma inside the close-quotation mark,*** as in lines 18 and 36 in the excerpt from Jennie; put colons and semicolons outside the close-quotation mark.

(2) **To emphasize** certain words in a quoted passage, in order to make them stand out, place in parentheses after your close-quotation mark the phrase (*my emphasis*) or (*emphasis added*). If the author has italicized the words, indicate this by adding (*Smith's emphasis*).

(3) **To add or change** a word in a quotation to make it fit into the grammar of your own sentence, which you should do only rarely, put brackets [ ] around the altered word. A source passage like "nostalgia for my salad days" might appear in your sentence as *he speaks of "nostalgia for [his] salad days."* A source passage like "I deeply distrust Freud's method of interpretation" might become *Smith writes that he "deeply distrust[s] Freud's method of interpretation."* Use this cumbersome device rarely; always try to construct your sentence so you can quote verbatim. If you need to change only an initial capital letter to a lowercase letter, do so silently, without putting brackets around the letter.

(4) **If the passage you quote contains a quotation,** use single rather than double quotation marks to indicate the source author's quoting.

(5) **To indicate a line break** in a quoted passage of poetry, use a slash (/), inserting a space before and after the slash: *Hamlet wonders if it is "nobler in the mind to suffer / The slings and arrows of outrageous fortune" or physically to act and thus escape them forever.*

(6) To omit words from the middle of a passage that you are quoting, ***use ellipsis points***: three spaced periods inserted at the point of omission. *"Even to take drugs once or twice," Diamond writes, "I must be strong enough to get past . . . the misery of my first hangover" (199).*

- If a sentence ends within the omitted portion, add an extra, fourth period and space, before the ellipsis, to indicate this.
- Don't use ellipsis marks at the start of a quotation, and only use them at the end if you are quoting a block and have omitted words from the end of the last sentence quoted.
- Don't omit only single words or short phrases, and never omit words in a way that gives a false sense of what the passage says (see section 3.3a).
- If the text you are quoting itself contains ellipsis marks, put the italicized word [*sic*] in square brackets immediately after the ellipsis.

2.5 Using Discursive Notes

Use a discursive footnote or endnote (also called a "substantive" or "content" note) when you want to make a comment, not just give publication details.

You may want to **tell your readers something extra** to the strict development of your argument. You may, for example, want to briefly amplify or explain something you have said, as does the note on page 12 of this book, and this note:

> 6. These differences are not small: in 1990 the US spent 45 percent more per capita than Canada, nearly three-quarters more than Germany and three times as much as the United Kingdom (Kingshorn 121; Connors 11).

Or direct readers to further items of interest, or acknowledge ideas of other scholars on the topic that resemble yours (see Box M) or that differ from them:

> 5. See chapter 3 of George Folsom's *Rectitudes* (London: Chatto, 1949) for an excellent summary of Gnostic doctrine and a slightly different critique of the ontological argument, stressing agency rather than effect.

Or notice, as an interesting aside, an implication or connection in your argument that your paper does not develop:

> 12. The use of the word "smelly" in this passage is illuminated by Jeffrey Myers's observation that Orwell "uses odor as a kind of ethical touchstone" (62). Orwell concludes his essay on Gandhi, Myers notes, by remarking "how clean a smell he has managed to leave behind" and says that the autobiography of Dali, the moral antithesis of Gandhi, "is a book that stinks."

Except in a long paper or thesis, however, use argument-related notes sparingly. In most cases, if the note is really interesting enough to include, you should work it into the argument of your paper (or save it for another paper).

You might also use a discursive note to **give extra information about sources**, for example about your use of a particular edition or of your own translation:

> 3. All translations from Pasteur are my own; I use the Malouf edition, which is based on an earlier and more complete draft of the treatise.

Or to say something about your citation system, or your use of terms or abbreviations:

> 2. Unless otherwise noted, references to Locke are to *Second Treatise of Government*, ed. C. B. Macpherson (Indianapolis: Hackett, 1980), which is cited by page number only.
>
> 3. Dickinson's poems are cited by their number in the Johnson edition, not by page number.
>
> 4. In this paper NK will refer to a natural cell-killer.

Where to put such discursive notes? If your paper cites sources by means of sequential footnotes or endnotes, include your discursive note in that sequence. If you're citing with reference to an alphabetical or coded list of references, create a separate section before the references list, but at the start of a new page, for sequentially numbered "Notes." If you have only one discursive note in such a paper, consider simply using an asterisk.

Finally, you may want to **acknowledge special help, influence, or support** from an uncited source, as discussed in Box C and illustrated by the following examples:

> 1. My understanding of Reconstruction is influenced by my reading of W. J. Cash's *Mind of the South* (New York: Knopf, 1941) and by stimulating discussions with Carol Peters and Tom Wah.
>
> 7. I am indebted for this observation and for the term "self-researching" to Susan Lin's comments in Anthro 25 class (2/6/16).
>
> 11. I wish to thank Roberto Perez for his objections to an earlier draft of this paper, and for directing me to the Gosson article.
>
> 1. Work for this assignment was done in collaboration with Vanessa Praz, who is mostly responsible for the "Methods" section.
>
> 6. I owe this example to Norma Knolls, whose help in understanding the mathematics of decision theory I gratefully acknowledge.
>
> 2. In this paper I use an analogy between soul and state developed in Prof. Caroline Hill's lectures for Sociology 144, Clark University, fall term 2013–14.

Science and social-science papers, which generally avoid discursive notes, often put acknowledgements of help in a special "Acknowledgements" section. In the humanities, if the help you're acknowledging is of a general kind, evident throughout the paper, put the raised reference number for your note after your title or at the point at which you first state your main idea. If it's help with a specific component, insert the note at the relevant point in the paper.