

chicago style for historical citations

The Chicago Manual of Style (CMOS) is a widely respected and frequently used citation system, particularly in the humanities and social sciences, with a robust framework for managing historical citations. Understanding its nuances is crucial for scholars, researchers, and students aiming to produce accurate, credible, and properly attributed academic work. This guide delves deeply into the principles and practices of Chicago style for historical citations, covering everything from the fundamental differences between its two main systems to the detailed formatting of various source types. We will explore the author-date and notes-bibliography systems, discuss the critical elements of a complete citation, and provide practical examples for common historical sources like books, articles, archival materials, and oral histories. Mastering Chicago style for historical citations ensures your research is ethically sound and easily verifiable for your readers.

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Understanding the Chicago Manual of Style (CMOS)

The Chicago Manual of Style is a comprehensive style guide offering recommendations on grammar, usage, punctuation, and documentation for scholarly writing. First published in 1906, it has undergone numerous revisions to keep pace with evolving academic and publishing standards. Its enduring popularity stems from its thoroughness and flexibility, making it suitable for a broad spectrum of disciplines, though it is particularly prevalent in history, literature, and the arts. For historical research, CMOS provides a structured approach to documenting evidence, which is paramount for academic integrity and allowing readers to trace the origins of information.

Adherence to a specific citation style, such as the Chicago Manual of Style, is not merely a matter of following arbitrary rules; it is fundamental to the scholarly enterprise. It demonstrates respect for the original creators of ideas and information, prevents plagiarism, and allows your audience to critically evaluate the sources upon which your arguments are built. In historical research, where interpretation of primary and secondary materials is central, precise citation is indispensable for establishing the credibility of an argument and guiding further scholarly inquiry.

The Two Citation Systems: Notes-Bibliography vs.

Author-Date

The Chicago Manual of Style offers two distinct systems for citation: the Notes-Bibliography system and the Author-Date system. Both systems achieve the goal of providing readers with adequate information to locate sources, but they differ significantly in their presentation and primary use cases. Choosing the appropriate system often depends on the conventions of a particular field or the requirements of a specific publisher or academic institution. For historical research, the Notes-Bibliography system is generally preferred.

The Notes-Bibliography System

The Notes-Bibliography system, often considered the more traditional choice for historians, uses numbered footnotes or endnotes to cite sources within the text. Each note corresponds to a superscript number placed after the relevant sentence or clause. These notes contain full publication details for the first citation of a source, and shortened versions (often including author, short title, and page number) for subsequent citations. This system allows for extensive commentary and digressions within the notes without disrupting the flow of the main text.

Following the use of notes, the Notes-Bibliography system also requires a comprehensive bibliography at the end of the work. The bibliography lists all sources cited in the notes, alphabetized by author's last name. It provides a consolidated overview of the research conducted and serves as a valuable resource for readers interested in exploring the topic further. The bibliography entries are formatted differently from the notes, typically omitting page numbers for entire works and presenting information in a more concise, list-like format.

The Author-Date System

The Author-Date system, on the other hand, uses brief in-text citations consisting of the author's last name, the year of publication, and the relevant page number (e.g., (Smith 2019, 45)). This system is more commonly found in the social sciences and natural sciences, where conciseness in the text is often prioritized. It eliminates the need for numbered footnotes or endnotes, making the main body of the text cleaner and more streamlined for readers who are not necessarily interested in immediate source verification.

As with the Notes-Bibliography system, the Author-Date system also requires a reference list at the end of the work. This reference list includes all sources cited in the text, alphabetized by author's last name. The entries in the reference list are more detailed than the in-text citations and include full publication information, similar to bibliography entries in the Notes-Bibliography system. The primary distinction is the absence of notes altogether.

Core Components of Chicago Style Historical Citations

Regardless of the chosen system, Chicago style citations for historical sources share fundamental components. These elements ensure that a reader can identify, locate, and verify the source material. The exact order and punctuation will vary slightly between the Notes-Bibliography and Author-Date systems, as well as between footnotes and bibliographies, but the core information remains consistent.

Key information typically required includes:

- Author(s) or editor(s) name(s)
- Title of the work (book, article, manuscript, etc.)
- Publication information (city, publisher, year for books; journal title, volume, issue, year for articles)
- Specific location information (page numbers, archive names, box and folder numbers for manuscripts)
- Date of creation for primary sources (e.g., letters, diaries)

The precision with which these components are presented is vital. Even a minor omission or misplacement of punctuation can render a citation incomplete or ambiguous, hindering a reader's ability to consult the source.

Formatting Notes in the Notes-Bibliography System

In the Notes-Bibliography system, the first time a source is cited, the note should contain complete bibliographical information. Subsequent citations to the same source typically use a shortened format. The goal is to provide enough information for the reader to identify the specific work and the exact location within it.

First Reference Notes

A first reference note for a book, for instance, would include the author's full name, the full title of the book (*italicized*), publication details (city: publisher, year), and the specific page number(s) being referenced. For example:

1. John Smith, *The History of a Nation* (New York: Academica Press, 2020), 78.

For an article in a journal, the note would include the author's full name, the article title (in quotation marks), the journal title (*italicized*), volume and issue numbers, year of publication, and the page

number(s). For example:

2. Jane Doe, "Early Colonial Life," *Journal of American History* 35, no. 2 (2018): 112.

Subsequent Reference Notes

After the first full citation, subsequent notes for the same source are shortened. This usually involves the author's last name, a shortened version of the title (if it's lengthy), and the page number. If only one source by an author is used, the title may be omitted. For example:

3. Smith, *History of a Nation*, 105.

4. Doe, "Early Colonial Life," 120.

If only one source by an author is cited throughout the work, the title can often be omitted after the first full citation:

5. Smith, 150.

Specific Note Formatting for Various Sources

Formatting for different types of sources within notes requires attention to detail. For instance, citing a chapter in an edited book requires including the chapter author, chapter title, editors, book title, publication information, and page numbers. Archival materials will have their own specific formats detailing the repository, collection name, and item identifiers.

Formatting Bibliographies in the Notes-Bibliography System

The bibliography, placed at the end of the work in the Notes-Bibliography system, provides a complete list of all sources consulted and cited. Unlike notes, bibliography entries typically omit specific page numbers for entire works and are alphabetized by the author's last name. The formatting in the bibliography is designed for clarity and ease of scanning.

Book Entries

A typical book entry in a bibliography looks like this:

Smith, John. *The History of a Nation*. New York: Academica Press, 2020.

Notice the inversion of the author's name (last name first) and the use of a period after the author's name, title, and publication information. The publisher's name is generally shortened if it's very long.

Journal Article Entries

A journal article entry in a bibliography follows this format:

Doe, Jane. "Early Colonial Life." *Journal of American History* 35, no. 2 (2018): 110–35.

Here, the article title is in quotation marks, the journal title is italicized, and the page range of the article is provided, separated by an en dash.

Edited Works and Chapters

For a chapter in an edited book, the entry includes the chapter author, chapter title, the editors, the book title, publication details, and the page range of the chapter. For example:

Johnson, Robert. "Social Structures of the Frontier." In *American Frontiers*, edited by Emily White and David Green, 201–230. Boston: University Press, 2015.

The main purpose of the bibliography is to provide a comprehensive and organized list that allows readers to quickly find any source mentioned in the notes.

Formatting Citations in the Author-Date System

The Author-Date system streamlines in-text citations, replacing footnotes or endnotes with brief parenthetical references. These in-text citations direct the reader to a corresponding full entry in the reference list at the end of the document. The key is to make these in-text references as unobtrusive as possible while still providing sufficient information.

In-Text Citations

An in-text citation typically includes the author's last name, the year of publication, and the specific page number(s). For example, if citing John Smith's book from the previous example:

The colonial period saw significant shifts in population (Smith 2019, 78).

If the author's name is mentioned in the sentence, only the year and page number are needed:

Smith (2019) argues that the colonial period saw significant shifts in population (78).

Reference List Entries

The reference list in the Author-Date system closely resembles the bibliography in the Notes-Bibliography system in terms of the information provided, but the formatting for different source

types can sometimes have subtle variations, particularly in punctuation and the inclusion of article identifiers like DOIs.

Book entry example:

Smith, John. 2019. *The History of a Nation*. New York: Academica Press.

Journal article entry example:

Doe, Jane. 2018. "Early Colonial Life." *Journal of American History* 35 (2): 110–35.

The inclusion of the year directly after the author's name is a hallmark of this system, immediately identifying the temporal context of the source.

Citing Specific Types of Historical Sources

Historical research often involves a wide array of source materials beyond standard books and journal articles. Chicago style provides specific guidance for many of these, ensuring consistency and clarity. This includes primary sources that are critical for historical analysis.

Primary Sources: Manuscripts and Archives

Citing archival materials requires detailing the repository, the collection name or title, and the specific item or folder. In a note, you would provide precise location information:

1. Abigail Adams to John Adams, March 31, 1776, Adams Papers, Massachusetts Historical Society, Boston.

In a bibliography (or reference list), the entry would be more general, listing the collection and repository, unless it's a specifically published primary source:

Adams, Abigail. *Abigail Adams Papers*. Adams Papers. Massachusetts Historical Society, Boston.

For unpublished manuscripts, detailed description of the manuscript's contents, physical characteristics, and provenance are often included.

Oral Histories and Interviews

Oral histories and interviews, whether recorded or transcribed, require careful citation. In a note, include the interviewee's name, the interviewer's name (if known and relevant), the date of the interview, and the location or archive where the material is housed.

1. Interview with Eleanor Vance, conducted by Maria Garcia, July 15, 2022, Oral History Collection, University Archives, City College.

The bibliography entry would also specify the nature of the source:

Vance, Eleanor. Interview by Maria Garcia. July 15, 2022. Oral History Collection. University Archives, City College.

Government Documents and Reports

Citing government documents can be complex due to varying publication practices. Generally, include the issuing body, the title of the document, and publication details. The author is often the government agency responsible for the document.

1. United States, Department of Commerce, Bureau of the Census, Historical Statistics of the United States, Colonial Times to 1970, comp. William L. Letwin and Harold E. Butler, vol. 1 (Washington, DC: Government Printing Office, 1975), 112.

The bibliography entry would mirror this structure.

Special Considerations for Archival Research

Archival research presents unique challenges for citation because materials may be unpublished, unique, and housed in various institutions. Chicago style offers flexibility but demands thoroughness. Accurately identifying the specific document, series, collection, and repository is paramount.

Consistency in Archival Descriptions

It is crucial to maintain consistency in how archival materials are described throughout your work. This includes using standardized terminology for the repository, collection names, and the specific finding aids or guides used to locate materials. If a collection is commonly referred to by an abbreviation, that abbreviation should be defined upon its first use.

When citing a specific document within a large collection, you should provide the most detailed information possible. This might include:

- The name of the author or sender
- The date of the document
- The recipient (if applicable)
- The title of the document (if it has one)
- The collection name and number
- The specific folder, box, or folio number

- The name of the archive or repository
- The city and state of the repository

Primary vs. Secondary Sources from Archives

It's important to distinguish between citing primary source materials (letters, diaries, official records) found in an archive and citing secondary source materials (like published finding aids or scholarly articles about the archive) that may also originate from an archival context. Both require clear attribution according to Chicago style.

For instance, a published guide to a collection would be cited like any other book or edited volume, while the primary documents within that collection are cited as described previously, focusing on their specific origin and location within the archive.

Best Practices for Consistent Chicago Style Application

Applying Chicago style, especially for historical citations, requires diligence and attention to detail. Inconsistent application can undermine the credibility of your work and frustrate readers attempting to locate your sources. Establishing and adhering to best practices are key to producing polished and professional academic writing.

Utilize Style Guides and Resources

The most authoritative resource is always The Chicago Manual of Style itself. However, for specific fields or common source types, supplementary guides like The Chicago Guide to Writing about History can offer more tailored advice. Familiarizing yourself with these resources is the first step towards correct application.

When in doubt about a particular citation element, consult these official guides. They provide detailed examples and rationales behind the rules, which can help you understand the principles and apply them correctly to new or unusual sources.

Maintain a Style Sheet

For larger projects, maintaining a style sheet can be invaluable. This document can track specific stylistic choices made throughout the research and writing process, such as how certain types of sources are abbreviated, how names of institutions are rendered, or how specific historical terms are treated. It serves as a quick reference to ensure consistency.

A style sheet can be particularly helpful when:

- Working with numerous archival collections
- Citing a wide range of primary and secondary source types
- Collaborating with other researchers
- Revisiting a project after a period of time

By proactively establishing and following clear guidelines, you can ensure that your Chicago style historical citations are accurate, complete, and uniformly applied, enhancing the overall quality and professionalism of your historical research.

FAQ

Q: What is the primary difference between the Notes-Bibliography and Author-Date systems in Chicago style for historical research?

A: The primary difference lies in how sources are cited within the text. The Notes-Bibliography system uses numbered footnotes or endnotes, allowing for more extensive commentary. The Author-Date system uses brief in-text citations consisting of the author's last name and publication year, which is often preferred for conciseness in the social sciences. For historical research, the Notes-Bibliography system is generally more common and recommended.

Q: When citing a primary source like a letter from an archive, what are the essential pieces of information needed for a Chicago style citation?

A: For a letter from an archive, you need to include the sender's name, the recipient's name (if known), the date of the letter, the title of the collection, the specific folder or box number, and the name and location of the archive. In a note, you would also include the specific page or folio number if referencing a particular part of the letter.

Q: How do I format a citation for a book that has been translated?

A: When citing a translated book, you should include the original author's name, the title of the translated work (in italics), the name of the translator, and the publication information for the translated edition. In the Notes-Bibliography system, the translator is usually mentioned in the note and in the bibliography entry. For example: Author, Title, trans. Translator (City: Publisher, Year).

Q: What is the difference between a footnote and an endnote in the Chicago style?

A: Both footnotes and endnotes serve the same purpose: to provide source information that corresponds to a numbered citation in the text. The difference is their placement. Footnotes appear at the bottom of the page where the citation number occurs, while endnotes are compiled and presented together at the end of the chapter or document, before the bibliography. Chicago style permits either.

Q: How should I cite an interview I conducted for my historical research?

A: For an interview you conducted, you should cite the interviewee's name, the fact that it was an interview, the interviewer's name (yourself), the date of the interview, and where the interview is preserved (e.g., your personal collection, an archive, or a transcription). In a note, you might include specifics like the duration if relevant. In the bibliography, it would be listed under the interviewee's name.

Q: What is the purpose of a bibliography in the Notes-Bibliography system?

A: The bibliography serves as a comprehensive list of all sources cited in the notes. It is alphabetized by author's last name and provides full publication details for each source, allowing readers to easily identify and locate the materials consulted. It is distinct from the notes, which provide specific instance citations and can include additional commentary.

Q: How do I cite a historical newspaper article in Chicago style?

A: To cite a historical newspaper article, include the author's name (if known), the article title (in quotation marks), the newspaper title (in italics), the date of publication, and the page number(s). If citing from an online archive, include the URL and access date. For example: John Doe, "Local Election Results," *The Daily Chronicle*, May 15, 1888, 2.

Q: Is it acceptable to use shortened notes for subsequent citations in Chicago style?

A: Yes, using shortened notes for subsequent citations is not only acceptable but standard practice in the Notes-Bibliography system. After the first full citation of a source, subsequent references can be shortened to include the author's last name, a brief title of the work, and the page number. If only one work by an author is cited, the title may be omitted in later notes.

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