

chicago style for history dissertations

The Chicago Manual of Style (CMOS) is an indispensable guide for crafting a high-quality history dissertation. Understanding its nuances is crucial for presenting your research with academic rigor and clarity. This comprehensive article delves into the intricacies of the Chicago style for history dissertations, covering everything from citation methods to formatting guidelines. We will explore why CMOS is the preferred choice for many history departments, the foundational principles of its two main citation systems, and practical advice for applying these rules consistently throughout your extensive research project. Mastering Chicago style will not only ensure your dissertation adheres to academic standards but will also enhance its credibility and readability for your intended audience, be they professors, fellow scholars, or future generations of historians.

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Understanding the Chicago Manual of Style (CMOS)

The Chicago Manual of Style is a comprehensive style guide published by the University of Chicago Press. It is widely respected and frequently used in the humanities, particularly in history. It offers detailed recommendations on grammar, punctuation, and, most importantly for academic writing, citation and manuscript preparation. For history dissertations, understanding CMOS is not merely about following a set of rules; it's about adopting a standard that facilitates clear, consistent, and verifiable scholarship.

The manual is updated periodically to reflect evolving academic practices and technological advancements. Its thoroughness means that almost any question regarding academic writing and formatting can be answered within its pages. For dissertations, this level of detail is invaluable, ensuring that every aspect of the manuscript, from the smallest punctuation mark to the largest structural element, meets scholarly expectations.

Why Chicago Style for History Dissertations?

History departments across many universities have gravitated towards the Chicago Manual of Style due to its historical prevalence in the field and its robust system for handling scholarly apparatus. The style's flexibility, particularly its dual citation options, makes it adaptable to various types of historical research and source materials. Furthermore, the emphasis on clear and accurate attribution aligns perfectly with the historian's need to meticulously document their evidence.

The tradition of using CMOS in history lends it a certain authority. When a dissertation adheres to CMOS, it signals to the reader—often a dissertation committee—that the author is well-versed in scholarly conventions and has produced a manuscript that is ready for academic discourse. This familiarity with the style also streamlines the review process, as committee members are typically well-acquainted with its requirements.

The Two Citation Systems in Chicago Style

One of the most significant features of the Chicago Manual of Style is its provision of two distinct citation systems: the notes-bibliography system and the author-date system. While both systems aim for accurate attribution, they differ in their presentation and are suited for different academic contexts. For history dissertations, the notes-bibliography system is overwhelmingly the preferred choice.

The notes-bibliography system uses footnotes or endnotes to cite sources within the text, accompanied by a comprehensive bibliography at the end of the work. This system allows for detailed annotations and discursive notes, which can be particularly useful in historical writing for providing supplementary information or engaging with historiographical debates without interrupting the main narrative flow. The author-date system, on the other hand, is more common in the social sciences and uses parenthetical in-text citations (Author Year, page number) followed by a reference list.

The Notes-Bibliography System for History

This system is the cornerstone of Chicago style for history dissertations. It involves placing a superscript number at the end of a sentence or clause that refers to a source. This number corresponds to a footnote at the bottom of the page or an endnote at the end of the chapter or the entire work. These notes provide the full citation details for the first mention of a source, and subsequent citations are often shortened.

The primary benefit of the notes-bibliography system in history is its ability to accommodate the complex and often extensive source base characteristic of historical research. Historians frequently engage with a wide array of archival materials, published documents, and secondary literature. The footnote system allows for precise referencing of specific passages and provides a space for the author to offer additional context or commentary without disrupting the main argument. The bibliography then serves as a consolidated list of all sources consulted, offering a roadmap of the research undertaken.

The Author-Date System (Less Common for History Dissertations)

While less prevalent in history departments for dissertations, it is important to acknowledge the author-date system. This system prioritizes brevity within the text. An in-text citation typically

includes the author's last name, the year of publication, and, if necessary, the page number (e.g., Smith 2020, 45). This is followed by a reference list at the end, which provides full publication details for each cited work.

The author-date system can be advantageous for fields where source material is more standardized or when an author wishes to emphasize the chronological aspect of their research. However, for history, which often requires detailed engagement with specific archival documents or nuanced interpretations of published works, the expressive potential of the notes-bibliography system generally outweighs the conciseness of the author-date approach.

Footnotes and Endnotes: A Deep Dive

Footnotes and endnotes are the backbone of the notes-bibliography system. They serve the dual purpose of providing immediate source attribution and offering opportunities for supplementary discussion. Understanding the correct format for these citations is paramount for any history dissertation.

Formatting Footnotes and Endnotes

The initial footnote or endnote for a source should include all necessary bibliographic information. This typically includes:

- Author's full name (first and last)
- Title of the work (italicized for books, in quotation marks for articles or chapters)
- Publication information (city of publication, publisher, year)
- Page number(s) being referenced

For example, a first note for a book might look like this: John Smith, *The History of Academia* (Chicago: University of Chicago Press, 2019), 105.

Subsequent citations of the same source can be shortened. Generally, this involves using the author's last name, a shortened version of the title (if necessary to distinguish from other works by the same author), and the page number. For example: Smith, *History of Academia*, 112.

There are specific formats for different types of sources, including journal articles, book chapters, archival documents, interviews, and online resources. Meticulous attention to these details ensures academic integrity.

When to Use Notes

Notes are essential for attributing direct quotations, paraphrased ideas, and factual information taken from another source. Beyond simple attribution, notes can also be used to:

- Provide additional context or historical background that would interrupt the main text.
- Engage in historiographical debates, discussing different interpretations of a source or event.
- Cite multiple sources for a single point.
- Refer the reader to related discussions within the dissertation or to other relevant scholarly works.
- Acknowledge the limitations or complexities of a particular source.

The strategic use of notes can significantly enhance the depth and scholarly value of a history dissertation.

The Bibliography: Essential Component of Chicago Style

The bibliography is a comprehensive list of all sources cited in the dissertation, presented at the end of the manuscript. It acts as a reader's guide to the research and a testament to the thoroughness of the author's investigation. In Chicago style, the bibliography is typically organized alphabetically by the author's last name.

Structure and Content of the Bibliography

The bibliography should include all sources for which a footnote or endnote has been provided. Each entry should be formatted consistently according to CMOS guidelines. While the content of a bibliography entry is similar to a first footnote, there are key differences in presentation:

- Author's name: Last name, First name.
- Title: Italicized for books, in quotation marks for articles or chapters.
- Publication information: City of publication, publisher, year.
- For articles or book chapters: Include the title of the larger work (journal or edited book) and page numbers.

A sample bibliography entry for a book:

Smith, John. *The History of Academia*. Chicago: University of Chicago Press, 2019.

A sample bibliography entry for a journal article:

Doe, Jane. "Rethinking the Enlightenment." *Journal of Modern History* 85, no. 3 (2018): 345-372.

Categorizing the Bibliography (Optional but Recommended)

For dissertations with extensive bibliographies, especially those that include a significant amount of archival material, it can be beneficial to categorize the bibliography. Common categories include:

- Primary Sources (e.g., Archival Documents, Newspapers, Oral Histories)
- Secondary Sources (e.g., Books, Journal Articles)

Within each category, entries are then alphabetized. This organizational approach aids the reader in understanding the types of evidence the dissertation draws upon.

Key Formatting Guidelines for History Dissertations

Beyond citation styles, the Chicago Manual of Style provides extensive guidelines for the physical formatting of a manuscript, which are critical for the presentation of a history dissertation. Adhering to these rules ensures a professional and scholarly appearance.

Manuscript Preparation

Dissertations typically require specific margins, font sizes, and spacing. While institutional guidelines may vary, CMOS offers general recommendations:

- Margins: Generally 1-inch on all sides.
- Font: A standard, readable font such as Times New Roman or Garamond, usually 12-point size.
- Spacing: Double-spacing for the main text is standard, with single-spacing often used for block quotations and tables.
- Page Numbering: Usually begins with the preface or introduction, with Roman numerals for preliminary pages and Arabic numerals for the main text and subsequent sections.

Title Page and Front Matter

The title page is the first impression of your dissertation. It must be clear, concise, and include all necessary information:

- Dissertation title
- Author's name
- Degree sought
- Department and university
- Date of submission

Preliminary pages often include a table of contents, acknowledgments, a list of figures or tables, and an abstract, all formatted according to CMOS standards.

Quotations and Citations

Specific rules apply to the presentation of quotations. Short quotations (typically fewer than five lines of text) are integrated into the running text and enclosed in quotation marks. Longer quotations, known as block quotations, are set off from the main text with a larger indentation and without quotation marks. These are also typically single-spaced, with an extra line of space before and after the block.

Citing Primary and Secondary Sources

History dissertations draw heavily on both primary and secondary sources. The Chicago style offers specific guidance for citing each type accurately and comprehensively.

Citing Primary Sources

Primary sources, such as archival documents, letters, diaries, government records, and oral histories, require meticulous citation. The key is to provide enough information for a reader to locate the original source.

- Archival Material: For archival documents, the citation should include the name of the archive, the collection name and number, the box or folder number, and the specific document or item. For example: The National Archives (College Park, MD), Record Group 123, Franklin D. Roosevelt Presidential Library, Papers of Harry Hopkins, Box 5, Folder "Meeting Minutes."

- Oral Histories and Interviews: Include the name of the interviewee, the interviewer (if different), the date of the interview, and where it is archived or available.
- Published Primary Sources: These are treated similarly to secondary sources, with publication details provided.

Citing Secondary Sources

Secondary sources, such as scholarly books and journal articles, follow the standard note and bibliography format for CMOS. It is crucial to distinguish between different types of secondary sources:

- Books: Full bibliographic details including author, title, publisher, and year.
- Journal Articles: Author, article title, journal title, volume, issue number, and page range.
- Book Chapters in Edited Volumes: Author of the chapter, chapter title, followed by "in" and then the editor(s) of the volume, the title of the volume, and publication details.

Accurate citation of secondary sources is vital for demonstrating awareness of existing scholarship and for positioning your own research within the broader historiographical landscape.

Common Pitfalls and How to Avoid Them

Navigating the complexities of Chicago style for a history dissertation can present challenges. Awareness of common errors can help prevent them.

Inconsistent Citation Formatting

One of the most frequent mistakes is inconsistency in how sources are cited. This can manifest as variations in punctuation, capitalization, or the order of information within notes and bibliography entries. To avoid this:

- Consult the latest edition of the Chicago Manual of Style regularly.
- Use citation management software if it aids your workflow, but always double-check its output.
- Create a style sheet for your dissertation, noting specific formatting decisions for recurring source types.
- Proofread meticulously for consistency.

Incorrect Page Number Referencing

Ensuring that the correct page number or range is cited for every piece of borrowed information is critical. This includes distinguishing between single-page citations and those spanning multiple pages.

Misinterpreting Note vs. Bibliography Entry

While the information is similar, the format of a note and its corresponding bibliography entry are distinct. For example, the author's name is typically presented as "First Last" in notes and "Last, First" in the bibliography. Always refer to CMOS for the precise format of each.

Over-reliance on Secondary Sources Without Primary Engagement

While secondary sources are essential, history dissertations are fundamentally about engaging with primary evidence. Ensure your footnotes and bibliography reflect a robust engagement with original materials, not just interpretations of them.

Ignoring Institutional Guidelines

While CMOS provides a standard, individual universities and history departments may have specific modifications or additional requirements for dissertation formatting. Always consult and adhere to your department's specific dissertation guidelines in conjunction with CMOS.

Frequently Asked Questions about Chicago Style for History Dissertations

Q: What is the primary citation system recommended for history dissertations using Chicago style?

A: The primary citation system recommended and most commonly used for history dissertations in Chicago style is the notes-bibliography system, which utilizes footnotes or endnotes.

Q: How do I cite an archival document in a Chicago style history dissertation footnote?

A: Citing an archival document involves specifying the archive, the collection name and number, the box or folder number, and the specific document or item. For example: The National Archives (College Park, MD), Record Group 123, Papers of John Doe, Box 1, Folder 5, Letter from Jane Smith to John Doe, March 15, 1955.

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

A: Footnotes appear at the bottom of the page where the reference is made, while endnotes are compiled at the end of a chapter or the entire dissertation. Both serve the same citation purpose, but their placement differs.

Q: How should I format my bibliography for a history dissertation using Chicago style?

A: The bibliography should be an alphabetical list of all cited sources. Entries for books begin with the author's last name, followed by their first name, the title in italics, and publication information. For journal articles, include the author, article title in quotation marks, journal title in italics, and volume, issue, and page details.

Q: Can I use a shortened note format for subsequent citations of the same source in my history dissertation?

A: Yes, Chicago style allows for shortened notes after the first full citation. This typically includes the author's last name, a shortened version of the title (if necessary), and the page number.

Q: What is the standard margin size recommended by the Chicago Manual of Style for dissertations?

A: The Chicago Manual of Style generally recommends 1-inch margins on all sides of the manuscript for optimal readability and professional presentation.

Q: Is it acceptable to include discursive notes in my footnotes or endnotes for my history dissertation?

A: Absolutely. Discursive notes are a key feature of the notes-bibliography system and are highly encouraged in history dissertations for providing supplementary information, engaging with historiography, or offering additional context without disrupting the main narrative.

Q: What should I do if my university has specific formatting guidelines that differ from the Chicago Manual of Style?

A: Always prioritize your university's or department's specific dissertation guidelines. If there are discrepancies, consult with your advisor or dissertation committee to determine which rules to follow.

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