Chicago’s Notes and Bibliography Formatting and Style Guide

What is Chicago?

What does Chicago regulate?

Chicago regulates:
• Stylistics and document format
• In-text citations (notes)
• End-of-text citations (bibliography)

Significant Changes 15th → 16th ed.

• Already familiar with the 15th ed. Chicago Manual of Style? Visit http://www.chicagomanualofstyle.org/about16_rules.html to review a list of significant changes affecting:
  – Titles that end in question marks or exclamation marks
  – Dividing URLs over a line
  – Names like iPod
  – Titles with quotations
  – Punctuation of foreign languages in an English context
  – Capitalization of "web" and "Internet"
  – Access dates
  – Classical references
  – Legal and public document references
Overarching Rules

“Regardless of the convention being followed, the primary criterion of any source citation is sufficient information either to lead readers directly to the sources consulted or . . . to positively identify the sources used . . . ” (The University of Chicago 2010, 655).

“Your instructor, department, or university may have guidelines that differ from the advice offered here. If so, those guidelines take precedence” (Turabian 2007, 374).

Chicago Style: Quotations

- Direct quotations should be integrated into your text in a grammatically correct way.
- Square brackets add clarifying words, phrases, or punctuation to direct quotations, when necessary.
- “Ellipses,” or three spaced periods, indicate the omission of words from a quoted passage.
  - Include additional punctuation when applicable.

Quotations, con’t

- “Sic” is italicized and put in square brackets immediately after a word that is misspelled or otherwise wrongly used in an original quotation.
- Italic type can be used for emphasis, but should only be used so infrequently
  - Do not use ALL CAPS for emphasis.
- When you use italics for emphasis within a quotation, you have to let the reader know the italics were not a part of the original quotation.
  - “Emphasis added,” “emphasis mine,” “italics added,” or “italics mine” are all acceptable.
- A colon (formal) or a comma (informal) can be used to introduce a direct quotation.
- Quotations within quotations are enclosed in single quotation marks.
  - When the entire quotation is a quotation within a quotation, only one set of double quotation marks is necessary.
- A title is treated with quotation marks or italics based on the type of work it is.
  - Book and periodical titles (titles of larger works) get italicized
  - Article, chapter, and shorter work titles get enclosed in double quotation marks.
Chicago Style: Capitalization

• Use headline-style capitalization for titles in the text, notes, and bibliography.
  – Capitalize the first word of the title and subtitle and all important words, including proper nouns.

• Apply sentence-style capitalization by request.
  – Follow the guidelines above but exclude the important words that are not proper nouns.

• Otherwise, take a minimalist approach to capitalization.
  – Lowercase terms used to describe periods, for example, except in the case of proper nouns (e.g., “the colonial period,” vs. “the Victorian era”).

General Format Requirements

Chicago recommends that you:

• print on standard-sized paper (8.5” x 11”),
• use 1” – 1.5” margins on all sides,
• choose a readable typeface (e.g., Times New Roman) at no less than 10 pt. (preferably, 12 pt.) ,
• double-space text, with one space after punctuation between sentences, and
• number pages beginning with Arabic numeral 1 on the first page of text.

Title Page

Title is centered one-third of the way down the page and written in ALL CAPS.

Name + course + date follows several lines later, also centered.

Main Body (Text)

• Number the first text page as page number 1.
• Type all text double-spaced (no break between sections).
• Identify the sources you use in the paper in footnotes and in the bibliography.
• Format tables and figures.
References Page

• Center the title, "Bibliography," at the top of the page. Do not bold, italicize or enclose in quotation marks.


• Flush left the first line of the entry and indent subsequent lines.

• Order entries alphabetically by the authors’ last names.

References: Basics

• Notes-Bibliography Style
  – Used by those in the humanities and some social sciences.
  – Requires footnotes and/or endnotes to cite sources and/or provide relevant commentary in the text.
  – Include each source that shows up in the text as an entry on the references page at the end of the paper.

References Basics, con’t

• Invert authors’ names (last name first followed by first name: Agamben, Giorgio).

• Alphabetize reference list entries by the last name of the first author of each work.

• Use headline-style capitalization for titles.

• Italicize titles of longer works such as books and journals.

• Put quotation marks around the titles of shorter works such as journal articles or essays in edited collections.

References Basics, con’t

• Publishers’ names are generally written out in full but may be abbreviated.

• Sources you consulted but did not directly cite may or may not be included (consult your instructor).

• Some sources are traditionally left out of bibliographies, such as personal communications; however, it’s better to ask permission than forgiveness (consult your instructor).
Making the References List

Chicago is a complex system of citation. When compiling the reference list, the strategy below might be useful:

1. Identify the type of source: Is it a book? A journal article? A webpage?
2. Find a sample of citing this type of source in the textbook or in the OWL Chicago Guide: [http://owl.english.purdue.edu/owl/resource/717/01/](http://owl.english.purdue.edu/owl/resource/717/01/)
3. “Mirror” the sample.
4. Make sure that the entries are listed in the alphabetical order and the subsequent lines are indented (Recall References: Basics).

References: Multiple Authors

- For multiple authors, use the conjunction “and,” not the ampersand: &.
- For two to three authors or editors,
  - write out all names in the order they appear on the title page of the source in both your notes and bibliography.
- For four to ten authors,
  - write out all names in the bibliography but use just the first author’s name and “et al.” in the notes.

References: One Author, Multiple Entries

- The 3-em dash (—) should be used to replace authors or editors’ names who hold multiple, successive entries in a bibliography.

References: Electronic Sources

- For electronic journal articles and other web sources, DOIs (Digital Object Identifiers) are preferred to URLs (Uniform resource Locators).
  - If you must use a URL, look for the “stable” version assigned by the journal.
- DOIs are to be prefaced with the letters “doi” and a colon.
- While DOIs are assigned to journal articles in any medium, you only need include a DOI when you accessed the electronic version of the source.
**References: Dates**

- No access date is required to be reported for electronic sources.
  - They can’t be verified; therefore, only resort to using access dates when date of publication is unavailable.
- If you cannot ascertain the publication date of a *printed* work, use the abbreviation “n.d.”

**Notes-Bibliography Style: In-text Basics**

- Each time a source is used in the text, it must be cited by note: footnote or endnote.
- Footnotes appear at the foot (bottom) of the page and are preferred.
- Endnotes appear at the end of the paper before the bibliography.
  - Endnotes become useful when footnotes become exorbitant.
- A combination of footnotes and endnotes and even author-date style can be used:
  - Use footnotes for substantive commentary and cite sources with endnotes.
  - Use footnotes for substantive commentary and cite sources with author-date parenthetical style.

**In-text Basics, con’t**

**Formatting notes**
- Place note numbers at the end of the clause or sentence to which they refer.
  - Place them after any and all punctuation except the dash.
- Begin note numbers with “1” and follow consecutively throughout a given paper.
- Superscript note numbers in the text. In the notes themselves, note numbers are full sized, not raised, and followed by a period.
  - Superscripting numbers in both places is also acceptable.

**In-text Basics, con’t**

- The first line of a footnote is indented .5” from the left margin.
- Subsequent lines within a note should be formatted flush left.
- Leave an extra line space between notes.
In-text Citations: Books

- A complete “note” citation for a book, which corresponds to a slightly differently formatted bibliography entry, would look like this:


- Subsequent note citations can and should be shortened
  - “Shortening” usually comprises the author’s last name and a “keyword” version of the work’s title in four or fewer words.
  - Subsequent citations of Dean would be shortened to Dean, Democracy and Other Neoliberal Fantasies, 30.

In-text Citations: Editors

- When an editor’s or translator’s name appears in addition to an author’s, the former appears after the latter in notes and bibliography.

  - Bibliographic “Edited by” or “Translated by” should be shortened to “ed.” and “trans.” in notes.
    - Plural forms, such as “eds.,” are never used.


In-text Citations: Ibid.

- “Ibid.” is an abbreviation meaning “in the same place.”
  - Use it when the present note repeats the information of the immediately preceding note.
  - For example, “Ibid., ##” indicates the same source but different page number(s).

- Aside from “Ibid.,” Chicago style offers cross-referencing for multiple notes with repeated content (especially for longer, discursive notes).

Substantive Notes

- When a note contains both source documentation and commentary, the latter should follow the former.

  - Citation and commentary are usually separated by a period, but such comments as “emphasis added” are usually enclosed in parentheses.

  - Discursive or “substantive” notes comment upon the text and need not necessarily include citations.

In-text Citations: Formatting Quotations

- A prose quotation of five or more lines should be “blocked.”
- The block quotation is single-spaced and takes no quotation marks, but you should leave an extra line space immediately before and after. Indent the entire quotation .5” (the same as you would the start of a new paragraph).

Chicago Headings

Chicago has an optional system of five heading levels.

<table>
<thead>
<tr>
<th>Level</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Centered, Boldface or Italic Type, Headline-style Capitalization</td>
</tr>
<tr>
<td>2</td>
<td>Centered, Regular Type, Headline-style Capitalization</td>
</tr>
<tr>
<td>3</td>
<td>Flush Left, Boldface or Italic Type, Headline-style Capitalization</td>
</tr>
<tr>
<td>4</td>
<td>Flush left, roman type, sentence-style capitalization</td>
</tr>
<tr>
<td>5</td>
<td>Run in at beginning of paragraph (no blank line after), boldface or italic type, sentence-style capitalization, terminal period.</td>
</tr>
</tbody>
</table>

Here is an example of the five-level heading system:

Contemporary Literature (Level 1)
What Are the Major Movements? (Level 2)
Beat Generation (Level 3)
Significant figures, events, and elements (Level 4)
Kerouac as the Leader: The role of founding Beat Generation poet was filled by Jack Kerouac... (Level 5)

Tables and Figures

- Position tables and figures after the paragraph in which they’re described.
- Cite the source of table and figure information with a “source line” at the bottom of the table or figure.
  - Source lines are introduced by the word Source(s), followed by a colon, and end with a period.
  - Cite a source as you would for parenthetical citation, minus the parentheses, and include full information in an entry on your References page.
  - Acknowledge reproduced or adapted sources appropriately (i.e., data adapted from; map by . . .)
Tables and Figures, con’t

• Every table should have a number and (a short and descriptive) title.
  − Flush left on the line above the table.
  − Table 1. Title without a terminal period
• Every figure should have a number and a caption.
  − Flush left on the line below the figure.
  − Figure 2. Caption with or without a terminal period.
• Number tables and figures separately, in the order you mention them in the text.
  − In the text, identify tables and figures by number (“in figure 3”) rather than by location (“below”).

Additional Chicago Resources

• The Purdue OWL
  http://owl.english.purdue.edu/owl/resource/717/01/.
• Purdue Writing Lab @ HEAV 226
• Composition textbooks
• The University of Chicago Press’ s The Chicago Manual of Style (16th ed.)
• Kate L. Turabian’ s A Manual for Writers of Research Papers, Theses, and Dissertations (7th ed.).
• Chicago’s website
  http://www.chicagomanualofstyle.org/home.html

The End