Chicago-Style Citation for Assignments in History: Notes & Bibliography Format (2019-2020)

The Purpose of Referencing/Documentation (Why Cite?)
There are four main reasons why historians and students of history must properly cite their sources:

1. *Intellectual property*. When you cite others’ work, you give credit to the historians who compiled, analyzed and distributed their research. You also demonstrate an understanding that history is not “just the facts” but is about particular historians’ interpretations of the past. If you do not distinguish between your own ideas and those of others, you commit an act of academic misconduct (see details below).

2. *Accuracy*. Citations show your reader that you have consulted the experts in the field and have represented their findings properly. The information in a citation allows readers to look at your sources and judge how well you have used them.

3. *Historiography*. From the sources you cite, an informed reader can deduce whether you have a good understanding of your topic. If your citations include key texts written by historians who specialize in the topic, your reader will be assured that you recognize the research tradition that informs your work.

4. *Innovation*. Writing about the past is an on-going process. Citations enable other historians to go back over the sources you consulted and see if they come to the same conclusions as you did. If not, they might look at other sources and write about their conclusions, which may be revised by another historian, and so on. This is how new interpretations about the past emerge.

NOTE: Section numbers in square brackets refer to *The Chicago Manual of Style (17th ed.)*

Avoiding Plagiarism - Citation Principles for Essays and Term Papers
Within essays, term papers, and any other written assignments (as in all academic work), you must identify (i.e., reference, document, cite) all quotations, paraphrases, ideas and images that come from someone else’s work. You must name the original author or source and surround quoted material with quotation marks or set it in a block format as described below. Copying any material and submitting it as your own (plagiarism) is an academic offence. Plagiarism may result in failure on the assignment and, in some cases, expulsion from a course. For more information, see the *Guide to Avoiding Plagiarism* and the section on “Plagiarism & Cheating” on p. 14 of the MRU *Student Conduct Guide* at [www.mtroyal.ca/codeofstudentconduct](http://www.mtroyal.ca/codeofstudentconduct).

Chicago Style: Notes and Bibliography Format
Chicago Style, and specifically the notes and bibliography format, is only one of many methods of documentation. This is usually the format used for History and the Humanities. Be sure to consult with your instructors to determine if they have a preference of styles. Whichever style you use, be consistent throughout your paper.

Details about the format are found in

- *Chicago Manual of Style (17th ed.)*, which is available for use in the MRU Library

What is a Source?
Sources provide the evidence on which historians base their interpretations of the past. Sources are either primary or secondary.

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**Primary sources** are unanalyzed documents or other artifacts that were created at the time an historical event occurred. They are the “raw material” used by historians to study the events of the past. These are some examples of primary sources:

- Facts (dates, events)
- Statistics (census, polls)
- Literature (poetry, novels)
- Participant accounts (interviews, diaries)
- Official documents (Treaty of Paris, Canadian Constitution)
- Artifacts (architecture, clothing, music)

**Secondary sources** are synthesized data written by an authority for the purpose of argumentation or explanation. Below are some examples of secondary sources:

- Journal articles
- Essays and papers
- Books (often known as *monographs*)
- Theses and dissertations

### Citing Sources within Your Paper

Whenever you use a quotation from an author, or summarize or paraphrase a person’s ideas or research, you must identify (reference/cite) the source. Failure to do so is plagiarism. This identification of information takes place in two parts: a note within your paper, as well as a bibliography at the end of your paper.

### Notes

The note can take the form of either a **footnote** (at the end of each page) or **endnote** (at the end of the paper), according to professor preference or personal taste.

The note includes these pieces of information:

- the **author(s)** of the work in standard order (first name first), unless already stated (always include author in endnotes)
- the **title** (capitalized headline-style)
- the **facts of publication** (e.g., place, publisher, and date)

### When Do I Use a Note?

A note is used to indicate the source of

- **Direct quotations.** When you include the exact words that are used by an author or appear in a primary source, you must place these phrases or sentences in quotation marks or as a block quote (see below) followed by a citation. Direct quotations must be put in proper context and replicated exactly. Use square brackets to maintain the grammatical integrity of your writing, or to add brief clarifying language. If you omit words from the quotation, indicate you have done so by including an ellipsis. For example: Cunningham and Grell explain that by the early seventeenth century, England and the Netherlands “were [the] two areas of Western Europe which . . . had just become free of population growth occasioning periodic peace-time dearth [of food] or famine.”

- **Paraphrased or summarized material.** When you put information from a source into your own words, you are paraphrasing or summarizing. For example, you may want to shorten a long discussion into one sentence or include only those pieces of evidence that are directly relevant to your topic. You may want to explain an author’s main idea or identify

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the gist of a piece of correspondence. In these instances you must place a note at the end of your sentence or sentences and indicate where you got this information. You do not enclose paraphrased or summarized material in quotation marks.

- **Annotated or explanatory notes.** When you want to provide a brief comment that expands upon a point, which is not directly related to the main text of the paper, you may use a note. Students should limit their use of annotated notes.

**A Few Other Notes on Notes**

- Notes are not required to support basic historical facts or common knowledge (e.g., The Dominion of Canada was created in 1867.)
- Notation numbers should appear in the text as a superscripted number like this.\(^1\)
- Notation numbers increase consecutively with each separate note and are numbered continuously throughout the entire paper.
- Notation numbers should appear at the end of sentences and follow punctuation.
  
  *Correct.* \( ^{1} \)  
  *Incorrect.* .\(^{1}\)
- Notation numbers should be Arabic (1, 2, 3) rather than Roman (I, II, III).
- Notes should include page numbers or other appropriate locators to indicate exactly where your information can be found.

**Second or Subsequent Notes**

The first time you cite a source you must include all of the required information in your note. When using a source a second or subsequent time, its endnote/footnote is given in a shorter form. The short form should include enough information to guide readers to the appropriate entry in the bibliography.

- The most common short title note includes the author’s surname, a shortened title of the source (if the title is more than four words, omitting the initial *A* or *The*), and page reference.
- If the work and the author remain the same and if you are using only one book or article by that author, simply give their surname and the page reference.
- If you use two authors with the same last name, give the full name (first and last) in the shortened note.
- See examples in the Sample Paragraph on page 5 of this guide.

**Citing Short Quotations (Run-in Quotations)**

When you incorporate a direct quotation into a sentence, you must use quotation marks and cite its source. See the example on p. 4.

**Citing Long Quotations (Block Quotations)**

Use a block quotation if the passage is

- more than 100 words,
- more than one paragraph, or
- more than 5 lines

You may also use a block quotation for

- emphasis,
- comparison to another quotation, or
- quoted correspondence, lists, and other quotations requiring special formatting
You must use a block format in which all lines of the quotation are indented approximately ½ inch from the left margin instead of using quotation marks. Block quotes must be single spaced and followed by a note.

**Citing Paraphrases**

When you paraphrase, you must cite the source of the idea. See the example below.  

**Samples of Short and Long Quotations and Paraphrases**

<table>
<thead>
<tr>
<th>Short Quotations</th>
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</table>
| In reference to Treaty 7, James Daschuk remarks, “Confusion persists over the precise meaning of the treaty.”  
One of the many difficulties surrounding the signing of Treaty 7 was that “no single person present could speak all of the languages of the people in attendance.”  
Translation posed a significant challenge for the First Nations: “Real problems arose because of faulty translation or no translation at all, which was especially the case for the Tsuu T’ina, Stoney, and to some extent the Blackfoot.” |

<table>
<thead>
<tr>
<th>Long Quotation in Block Format</th>
</tr>
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</table>
| Rephrasing first-hand interviews with Treaty 7 Elders, the authors elaborate on the communication challenges the First Nations signatories faced:  
Rosie Red Crow indicated that . . . some of the Bloods’ gestures might have been misunderstood by the commissioners. A conversational practice of the Bloods is to continue to say “ah, ah” as a speaker is talking, not to indicate agreement with what is being said, but simply to acknowledge that the person is speaking and has the floor. . . . Red Crow contended that the commissioners might have thought the Bloods were agreeing … rather than understanding that the Bloods were simply acknowledging the commissioners’ right to speak. |

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<tr>
<th>Paraphrase</th>
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<tr>
<td>The numerous languages spoken at the gathering and inability of any attendee to communicate in all of them further complicated the signing of Treaty 7.</td>
</tr>
</tbody>
</table>

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5 Treaty 7 Elders and Tribal Council, *The True Spirit, 303.*

**Avoid overusing quotations.** In the study of history, all essays should contain direct quotes, but the work you submit is yours. Evaluate and interpret quotations as evidence rather than unassailable fact. Introduce your quotes and add your own analysis.

**Use long quotations sparingly.** If possible, avoid using long quotations.

**Avoid overreliance on a single source.** You should normally use multiple sources to support your work.
Citing a Source with an Unknown Publication Date

When the publication date of a work cannot be determined, the abbreviation n.d. takes the place of the year in the publication details.


<table>
<thead>
<tr>
<th>Citing a Source Quoted in Another Source (Secondary Citations)</th>
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<tbody>
<tr>
<td>If one of your sources quotes or directly refers to another source and you wish to use this information in your paper, you must cite the original source as well as the source in which you found it. Whenever possible, you should try to find the original source. If this is not possible, include both the original source and the secondary source which you read in a footnote/endnote, and include only the source you read in your bibliography. Your note would appear as follows:</td>
</tr>
<tr>
<td>This is the source that Walter consulted. This is the source you consulted.</td>
</tr>
</tbody>
</table>

Sample Paragraph with Footnotes

Viscount Palmerston’s determination to pursue a peaceful solution in 1839 and 1840, despite its rejection by France, conveys the impression that he was deeply committed to concert diplomacy. Paul Schroeder’s study of Austrian and British diplomacy during the Crimean War, however, makes it clear that Palmerston was central to Britain’s successful attempt to undermine the efforts at concert diplomacy undertaken by Count Buol.9 Similarly, Muriel Chamberlain has argued that the “Canningite” diplomatic tradition to which Palmerston belongs was characterized by confrontation rather than the more peaceful methods of the concert.10 Chamberlain also argues that Palmerston used the idea of concert diplomacy opportunistically rather than idealistically.11 Hence, while Palmerston was a late convert to the idea of a concert solution, for most of the 1830s he assiduously opposed it, and asserted that “it would embarrass the ministry at home, would not sufficiently enhance Britain’s standing in the world . . . and would even make Britain appear cowardly and unwilling to fight” and in so doing delayed a satisfactory solution to the problems in the Near East.12 He was, as one scholar has claimed, more of a “troublemaker” with “combative views and [a] desire for a showdown” than a peacemaker.13

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11 Chamberlain, ‘Pax Britannica’?, 106
13 Schroeder, *Austria, Great Britain and the Crimean War*, 412.

Note 11 has the same source and page number as the previous reference, so the source and page number can be represented with a short note. Note 12 combines three separate sources into one reference.
A bibliography lists ALL sources that you consulted, including those you read but did not cite.

**Start bibliography on a separate page at the end of your paper.**

Normally, author last name is the first element in each entry.

When author is unknown, start entry with title of source.

Use a ½ inch hanging-indent for 2nd and subsequent lines of an entry.

For multiple entries by the same author, a dash replaces the name after its first appearance.

Order entries alphabetically by the first letter of the entry.

Break a long URL after a slash, colon, period, etc.

Entries are single-spaced with a single space between entries.

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### Bibliography


Canada. *An Act to Amend and Consolidate the Laws Respecting Indians*, 3rd Session, 3rd Parliament, 1876, Assented to 12 April 1876.


Using the Table of Examples to Format Your Notes and Bibliography

1. Look through the examples of sources on the following pages categorized as Books, Periodical/Journal Articles, Reference Works, etc., and find the combination of formatting from one or more examples that is the best fit.
2. Remember, your goal is to provide information in each note and bibliography entry that would allow someone reading your essay or research paper to locate that particular source of information or document. Therefore, accuracy is extremely important.

### A. Books

<table>
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<tr>
<th>Section</th>
<th>Format</th>
<th>In footnote/endnote:</th>
<th>In bibliography:</th>
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<tbody>
<tr>
<td>A1</td>
<td>General format</td>
<td>First Note (1st Note)</td>
<td>AuthorLastName, First Name. Title of Book: Subtitle of Book. Edition number if provided. City of Publication: Publisher, Year of Publication.</td>
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<td>A2</td>
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</table>

**Notes:**

- **et al.** is a Latin term meaning “and others.” Use it in your note when citing more than three authors. All authors are generally listed in the bibliography.

**Bibliography:**

AuthorLastName, First Name. Title of Book: Subtitle of Book. Edition number if provided. City of Publication: Publisher, Year of Publication.
|    |                          | When citing chapters within books, you must include both the chapter title and author, as well as the book title and editor information. |
2 Gen. 25:19. | Title of books/chapters in sacred texts may be abbreviated. References to sacred texts usually appear in notes and are omitted from bibliographies. |
### B. Periodical/Journal Articles

#### B1 General format

**In footnote/endnote:**

First Note (1st Note)


Subsequent Notes (2nd+ Note)

2. AuthorLastName, “Shortened Title of Article,” page number.

**In bibliography:**


Journal volume and issue (indicated by “no.”) are usually displayed following the journal title on the journal cover or within a database.

#### B2 Scholarly journal article, one author, with DOI


#### B3 Scholarly journal article, two authors, from database


#### B4 Online newspaper article


2. Stackhouse, “India Plans Cautious Approach.”

Omit newspaper articles from bibliographies and include only in a note, unless frequently cited or critical to your argument. If the article was accessed in a library database, use the database name as the final element.

Page numbers for newspapers may be omitted, as items may be in different locations (or eliminated) in various editions. Section numbers or names may be given if the paper is published in several sections. Note that dates are formatted differently for newspaper articles compared to journal articles.
<table>
<thead>
<tr>
<th>Sample Citations</th>
<th>Notes</th>
<th>Bibliography</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>B5</strong> Newspaper article, author unknown, accessed online</td>
<td></td>
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</tbody>
</table>
2 “Here Comes Calgary,” *The Times*.  
If the article was accessed in a library database, use the database name as the final element. | 
| **B6** Magazine article [14.188] | 
2 Howe, “Ascent and Plummet,” 81.  
Specific page numbers may be included in notes, but page ranges of magazine articles may be omitted from bibliographies. If including page number, separate it by a comma from the date of issue, rather than a colon. For online magazines, omit page number and include URL. | Howe, Suum. “The Ascent and Plummet of the Working Class in the Twentieth Century.” *History Today*, July 4, 2008. |
| **B7** Magazine article, from an online collection of historical documents | 
### C. Reference Works

<table>
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<tr>
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<tr>
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<td>General format</td>
<td>First Note (1st Note)</td>
<td>Title of Encyclopedia. Edition number/Number of volumes (if applicable). Publisher, Date of Publication. Electronic Retrieval Statement (if applicable).</td>
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<td>1 Title of Encyclopedia, edition number if provided , s.v. “Encyclopedia Entry Title,” Date of Publication as provided, Electronic Retrieval Statement (if applicable).</td>
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<td>2 Title of Encyclopedia, s.v. “Encyclopedia Entry Title.”</td>
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#### C2 Entry in an online reference work, author unknown

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<tr>
<td>2</td>
<td>Encyclopaedia of the Renaissance, s.v. “Arcadia.”</td>
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</table>

**s.v.** is an abbreviation of *sub verbo*, meaning “under the word.” Plural form: *s.vv.*

#### C3 Entry in a print reference work, author known

<table>
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<th>In footnote/endnote:</th>
<th>In bibliography:</th>
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<td>2</td>
<td>Planter, Encyclopaedia of the History of Western Thought, s.v. “John Locke.”</td>
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</table>

No page number is required for reference works.

### D. Webpages and Websites

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<td>D1</td>
<td>General format</td>
<td>First Note (1st Note)</td>
<td>Author Last Name, First Name. “Title of Web Page or Entry.” Owner/Sponsor of Website. Date Website last modified. URL.</td>
</tr>
<tr>
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<td>1 Author FirstName LastName, “Title of Web Page or Entry,” Owner/Sponsor of Website, Date Website last modified, URL.</td>
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<td>Subsequent Notes (2nd+ Note)</td>
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<td>2 Author LastName, Title of Web Page or Entry.</td>
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#### D2 Primary source, republished on the web

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<th>In footnote/endnote:</th>
<th>In bibliography:</th>
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</thead>
</table>

For longer electronic sources without number pages, include a chapter or paragraph number or heading where helpful [14.22].
### D3 Webpage, author known

2. Deed, “Bronze Age Metallurgy.”

When quoting from a website, it is not always necessary to include a bibliography entry. Check with your instructor(s) for their preference.

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### D4 Blog post


Blog posts are cited in the same way as newspaper articles, i.e., no bibliography entry is needed. The word “blog” should come at the end of the title in (parentheses) unless it already appears in the title itself.

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### E. Unpublished and Informally Published Materials

#### E1 Thesis or dissertation, online


#### E2 Interview, unpublished

Jane Ducharme (Manager, Aboriginal Student Centre, University of Alberta), interview by the author, Edmonton, September 2011.

Ducharme, interview.

Omit unrecoverable data (including interviews, unpublished lectures, and other forms of personal communication) from bibliography.

#### E3 Lecture notes

1. Kirk Niergarth, “The Temperance Movement in Canada in the 19th Century” (lecture, Modern Canada 1867 to Present, Mount Royal University, Calgary, AB, October 25, 2011).
2. Niergarth, “Temperance Movement in Canada.”

Check with your instructor before using lecture notes in an assignment.
### F. Videos and Images

<table>
<thead>
<tr>
<th>Video recordings</th>
<th>Notes</th>
<th>Bibliography</th>
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</table>

For audiovisual sources, entries may begin with the person primarily responsible for the material or with the title. Use your judgement to decide.

If available, the type of file, file number, and time at which the cited material appears in the file should be included in the note. If no date can be determined from the source, include the date you last accessed the material.

Most often works of art can be referred to in-text rather than in a note or bibliography entry (14.235). If a bibliographical citation is required for either clarity or to fulfill an assignment’s criteria, the above citations would be satisfactory.

Normally, for items retrieved from a web-based database with a search box, only include the URL for the website’s homepage. For example, for items retrieved from the Library of Congress, use [http://loc.gov](http://loc.gov) NOT [http://loc.gov/en/item/81/view/1/1/?ab32=761](http://loc.gov/en/item/81/view/1/1/?ab32=761).
## G. Museum Exhibits

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<thead>
<tr>
<th>G1</th>
<th>General Format</th>
<th>In footnote/endnote: First Note (1st Note)</th>
<th>In bibliography: Curator/Author/Producer LastName, FirstName. Title of Exhibit. Museum Location: Museum Name, Date of Exhibit.</th>
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</thead>
<tbody>
<tr>
<td></td>
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<td>1 Curator/Author/Producer FirstName LastName, Title of Exhibit (City of Museum: Museum Name, Date of Exhibit), “Item Placard Title” if citing a specific part of exhibit.</td>
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<td>Subsequent Notes (2nd+ Note)</td>
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<td>2 Curator/Author/Producer LastName, Shortened Title “Item Placard Title” if citing a specific part of exhibit.</td>
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Curator/Author/Producer may be an organization rather than an individual. If so, give organization name.

### H. Government and Legal Documents

#### H1 General format

The rules for citing government publications vary by publication type. Where relevant, include page number and speaker information. Where provided, try to include information such as clauses/first reading date/session number/assented date. For legal documents, Chicago recommends using *The Bluebook: A Uniform System of Citation*.

**In footnote/endnote:**

**First Note (1st Note)**

1 Country or other jurisdiction and/or issuing agency, *Title of Publication/Document*, *(Document number)/other identifier if provided*, Place of publication: Publisher, Date.

**Subsequent Notes (2nd+ Note)**

2 *Short Title of Publication*, date.

**In bibliography:**

Country or other jurisdiction and/or issuing agency. *Title of Publication/Document*, *(Document number)/other identifier if provided*. Place of publication: Publisher, Date.

#### H2 Bill (Canadian, federal)

1 Indian Act, R.S.C. § 1, c. 4(2)(a).

2 Indian Act, R.S.C. § 1, c. 4(2)(a).

R.S.C. = Royal Statutes of Canada, § = section symbol, c. = chapter

All the information referring to lettered or numbered subsections, paragraphs, etc. should follow the order and format provided in the document. If the legislation being quoted has since been amended or repealed, the date of the version cited should be provided in parentheses. Legal documents do not require a bibliography entry.

#### H3 Debates/Hansard (Canadian, provincial), viewed freely available online


2 *Hansard* (May 26, 1980), 80.

#### H4 Government department/agency publication


2 *Population Change*, (September 27, 2011).

Include page numbers in the citation when they are included in the source.
## I. Archival Sources

<table>
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<th>General format</th>
<th>In footnote/endnote: First Note (1st Note)</th>
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<td>¹ Title of Archival Item, Publication/Creation Date, Series Title if provided, Name of Collection if provided, Name of the Archive/Depository, Record Group, File #, and/or other identifying information as provided.</td>
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<td>Subsequent Notes (2nd+ Note)</td>
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<td>² Shortened Title of Archival Item, Publication/Creation Date.</td>
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</table>

Items may not have all of these elements, so include any information provided to help readers locate the source.

Notes and bibliographies have different source identifiers in the first position for archival sources. Identify the archival item as precisely as possible in the first position in a note. Depending on what information is available put the name of the collection, author, or archive in the first position in the bibliography. If multiple items from a collection are documented, do not include individual item titles in the bibliography. [14.233]

|    |                           | ² Douglas to Aberhart, 13 April 1935. |                  |

|    |                                 | ² Submission of Wheat Pool to Royal Commission, 9 October 1953. |                  |

This handout has been compiled by Mount Royal University Library & Student Learning Services, in consultation with the Dept. of Humanities. Please consult them for more information on documentation or go to www.chicagomanualofstyle.org. Rev. Summer 2019.