ENG102: A Guide to Academic Research

Course Pack 2: Research: Process to Final Product
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Chapter 1: Types of Sources

Understanding types of sources helps guide your search.

Once you have your research question, you’ll need information sources to answer it and meet the other information needs of your research project.

This section about categorizing sources will increase your sophistication about them and save you time in the long run because you’ll understand the big picture. That big picture will be useful as you plan your own sources for a specific research project.

You’ll usually have a lot of sources available to meet the information needs of your projects. In today’s complex information landscape, just about anything that contains information can be considered a source.

Here are a few examples:

- books and encyclopedias
- websites, web pages, and blogs
- magazine, journal, and newspaper articles
- research reports and conference papers
- field notes and diaries
- photographs, paintings, cartoons, and other art works
- TV and radio programs, podcasts, movies, and videos
- illuminated manuscripts and artifacts
Chapter 1

- bones, minerals, and fossils
- preserved tissues and organs
- architectural plans and maps
- pamphlets and government documents
- music scores and recorded performances
- dance notation and theater set models

With so many sources available, the question usually is not whether sources exist for your project but which ones will best meet your information needs.

Being able to categorize a source helps you understand the kind of information it contains, which is a big clue to (1) whether it might meet one or more of your information needs and (2) where to look for it and similar sources.

A source can be categorized by the following:

- Whether it contains quantitative or qualitative information or both.
- Whether the source is objective (factual) or persuasive (opinion) and may be biased.
- Whether the source is a scholarly, professional or popular publication.
- Whether the material is a primary, secondary or tertiary source.
- What the format of the source is.

As you may already be able to tell, sources can be in more than one category at the same time because the categories are not mutually exclusive.

Quantitative or Qualitative

One of the most obvious ways to categorize information is by whether it is quantitative or qualitative. Some sources contain either quantitative information or qualitative information, but sources often contain both.

Many people first think of information as something like what’s in a table or spreadsheet of numbers and words. But information can be conveyed in more ways than textually or numerically.

**Quantitative Information** – Involves a measurable quantity—numbers are used. Some examples are length, mass, temperature, and time. Quantitative information is often called data.

**Qualitative Information** – Involves a descriptive judgment using concepts (words instead of numbers). Gender, country name, animal species, and emotional state are examples of qualitative information.

Take a quick look at the Example table that follows. Another way we could display the table’s numerical information is in a graphic format—listing the students’ ages or GPAs on a bar chart, for example, rather than in a list of numbers. Or, all the information in the table could be displayed instead as a video of each student giving those details about themselves.
Types of Sources

Increasingly, other formats (such as images, sound, and video) may be used as information or used to convey information. Some examples:

- A video of someone watching scenes from horror movies, with information about their heart rate and blood pressure embedded in the video. Instead of a description of the person’s reactions to the scenes, you can see their reactions.
- A database of information about birds, which includes a sound file for each bird singing. Would you prefer a description of a bird’s song or an audio clip?
- A list of colors, which include an image of the actual color. Extremely helpful, especially when there are a lot of color names.
- A friend orally tells you that a new pizza place is 3 blocks away, charges $2 a slice, and that the pizza is delicious. This may never be recorded, but this may be very valuable information if you’re hungry.
- A map of Arizona with counties shaded different intensities of red according to median household income of inhabitants.

Fact or Opinion

Thinking about the reason an author produced a source can be helpful to you because that reason was what dictated the kind of information he/she chose to include. Depending on that purpose, the author may have chosen to include factual, analytical, and objective information. Or, instead, it may have suited his/her purpose to include information that was subjective and therefore less factual and analytical. The author’s reason for producing the source also determined whether he or she included more than one perspective or just his/her own.
Authors typically want to accomplish one or more of these goals:

- Inform and educate.
- Persuade.
- Sell services or products.
- Entertain.

**Combined Purposes**

Sometimes authors have a combination of purposes, as when a marketer decides he can sell more smart phones with an informative sales video that also entertains us. The same is true when a singer writes and performs a song that entertains us but that she intends to make available for sale. Other examples of authors having multiple purposes occur in most scholarly writing.

In those cases, authors certainly want to inform and educate their audiences. But they also want to persuade their audiences that what they are reporting and/or postulating is a true description of a situation, event, or phenomenon or a valid argument that their audience must take a particular action. In this blend of scholarly author’s purposes, the intent to educate and inform is considered to trump the intent to persuade.

**Why Intent Matters**

Authors’ intent usually matters in how useful their information can be to your research project, depending on which information need you are trying to meet. For instance, when you’re looking for sources that will help you actually decide your answer to your research question or evidence for your answer that you will share with your audience, you will want the author’s main purpose to have been to inform or educate his/her audience. That’s because, with that intent, he/she is likely to have used

- Facts where possible.
- Multiple perspectives instead of just his/her own.
- Little subjective information.
- Seemingly unbiased, objective language that cites where he/she got the information.

The reason you want that kind of resource when trying to answer your research question or explaining that answer is that all of those characteristics will lend credibility to the argument you are making with your project. Both you and your audience will simply find it easier to believe—will have more confidence in the argument being made —when you include those types of sources.

Sources whose authors intend only to persuade others won’t meet your information need for an answer to your research question or evidence with which to convince your audience. That’s because they don’t always confine themselves to facts. Instead, they tell us their opinions without backing them up with evidence.
Fake News and False Information

An old adage says, “A lie can be halfway round the world, before the truth has got its boots on.” False facts, often now termed “fake news,” is not new. As long as people have shared stories, fake stories have been in existence. The term “yellow journalism,” coined in the late 1800s by Joseph Pulitzer in an ongoing battle with William Randolph Hearst, was the first published reference to the phenomenon.

What is new is the growing influence of technology and social media in the dissemination of information and the inability of people to distinguish fact from fabrication. A November 2016 Stanford study by its Graduate School of Education showed that “more than 7,800 students from 12 states in middle school, high school and college… were easily deceived by sponsored content and fake accounts.” The executive summary of the study stated, “Overall, young people’s ability to reason about the information on the Internet can be summed up in one word: bleak” (“Evaluating Information…”).

Two recent examples show the impact of fake news. The first is humorous and harmless, and even embarrassing for people who believed the fake story and shared it. The factual part of the story is that in 2012, Apple sued Samsung for patent infringement and was awarded $1.05 million in damages. A Spanish news site wrote a humorous satire that reported Samsung paid Apple entirely in U.S. nickels, delivered by 30 trucks to Apple’s California headquarters. The story was picked up and spread as true by
social media. The problem is that the facts and math make the story impossible, as the fine would require 20 billion coins, virtually every nickel in current U.S. circulation, and take “the equivalent of about 2,755 eighteen-wheeler trucks, each hauling 40 tons’ worth of nickels” to carry out the feat (Mikkelson).

More dangerous, however, is “Pizzagate,” a false story about a child sex trafficking ring being run out of Comet Ping Pong, a restaurant in Washington, D.C, and linking presidential candidate Hillary Clinton to the ring. The fake news story spread through social media and fake news websites to the point where Comet employees were receiving death threats, and protests were staged outside the restaurant. A North Carolina man, Edgar M.Welch, was so fooled by the fabrication that he showed up at the restaurant armed with an AR-15 style assault rifle to “self-investigate” the story, threatening employees and firing shots. No one was wounded, and Welch eventually pleaded guilty to weapons and assault charges in federal court. After the incident, Infowars’ Alex Jones apologized for promoting the story.

The fake story’s origin has been mapped by BuzzFeed and can be viewed at https://www.buzzfeed.com/craigsilverman/fever-swamp-election?utm_term=.dvXJrmk6p#.amR2ow1z9. BuzzFeed states that the fabrication most likely originated in a tweet from a woman in Missouri; well known is how the false story spread through Facebook, Reddit and 4chan, was trolled from as far as Macedonia, and shared by hundreds of thousands of users and sites without any evidence.

What’s important here for researchers to understand is that fake information is easily created, posted and shared in the current digital world. “On Twitter, an analysis by University of Southern California computer scientists found that nearly 20 percent of [2016] election-related tweets came from bots, computer programs posing as real people and often spouting biased or fake news,” observes reporter Erika Engelhaupt in “You’ve probably been tricked by fake news and don’t know it,” published in Science News.

Engelhaupt notes that for both researchers and the general public when discerning fact from false fact, our beliefs get in the way; the problem is real and “we all do it.”

Plenty of research shows that people are more likely to believe news if it confirms their preexisting political views, says cognitive scientist David Rapp of Northwestern University in Evanston, Ill. More surprising, though, are Rapp’s latest studies along with others on learning and memory. They show that when we read inaccurate information, we often remember it later as being true, even if we initially knew it was wrong. That misinformation can then bias us or affect our decisions (qtd. in Engelhaupt).

While Google and Facebook work to design algorithms to combat fake news, many argue that the public should educate themselves and use tools to determine factual versus incorrect or false information.

Not only does the public have to sort through fake news and conspiracy theories, false facts are pushed by industries to hide facts detrimental to business. Consider the now historic example of the tobacco industry denying for decades the science that proved smoking and chewing tobacco is dangerous to people’s health. It took years of lawsuits brought by states and eventually the United States Department of Justice to force the industry to admit that “the tobacco companies conspired for decades to defraud the public about the health risks associated with smoking… [and] misled the public by, for example, luring kids to use products that the industry manipulated to make more addictive” (“The Game Changer”). Or BP Oil’s cover up of the extent and damage of the 2010 Deepwater Horizon spill in the Gulf of Mexico that eventually led to the resignation of BP’s CEO and a federal court settlement for $5.5 billion Clean Water Act penalty and up to $18.7 billion in natural resource and economic damages to four states in the Gulf.
Researchers must always be cognizant of false information and carefully evaluate stories, studies, and reports when conducting scholarly inquiry. CRAAP, CARBS, DUPED and other evaluation tools help researchers apply a set of standards to information, especially information found in the World Wide Web.

**Works Cited**


**News or Opinion?**

Written by Christine Photinos for *Writing Commons*

Research we do on the Web and through library databases often leads us to content from newspapers, magazines, and news agencies (such as Reuters and the Associated Press). What all news content has in common is that it connects in some way to something that is in the news. News content can be roughly divided into the categories of *news* and *opinion*. News articles attempt to provide information on a current event, while opinion pieces attempt to persuade readers to adopt a particular position on that event.

The distinction between news and opinion is not black and white. An example of one grey area is “advocacy reporting”—when news is reported from an explicit perspective. For example, news articles published in the Humane Society magazine—*All Animals*—generally serve the organization’s larger agenda of promoting humane treatment of animals (Example: “Big Changes at SeaWorld” *All Animals* May/June 2016).

Another subcategory of news that can at times seem to enter into this grey area is “news analysis”—news writing that pushes beyond surface answers to the 5 W’s and H (Who? What? Where? When? Why? and How?) to explore causes and consequences of news events (Example: “Grammy Awards 2018: How the Recording Academy has Evolved Toward Relevance” *LA Times* Nov. 28, 2017).

More generally, we should recognize that the way in which news is presented—including what information is selected for inclusion, and what words and images are used to communicate that information—can encourage particular understandings or perspectives. We should always be alert to such factors in news reporting, and to significant departures from accepted standards of journalistic fairness and accuracy.
But to reject the journalistic distinction between news and opinion is to turn all sources into an undifferentiated mass of “information.” An analogy: These days many movies contain commercial messages (for example, product placement) and many commercials have taken on movie-like qualities (consider this AT&T ad—titled “Whole New World,” for example). Yet we still value the ability to distinguish between these two types of content and to refer to them by different names. (Without different names for these two types of content, how would we express frustration with a feature-length Burger King ad? What words would we use?)

Skillful researchers are able to identify sources by type, even in circumstances when they do not believe a source has achieved the highest ideals of its type. Below (Table 1) are some defining features of “news” and “opinion.”

<table>
<thead>
<tr>
<th>News</th>
<th>Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>The writer reports the news. People’s opinions may appear as part of that reporting (“According to Mr. Smith…”), but the writer does not explicitly present his/her own views.</td>
<td>The writer shares his or her own views and explicitly seeks to persuade readers to adopt those views as their own.</td>
</tr>
</tbody>
</table>

Table 1

Below (Table 2) are some sub-categories of news and opinion:

<table>
<thead>
<tr>
<th>News</th>
</tr>
</thead>
<tbody>
<tr>
<td>News Article</td>
</tr>
<tr>
<td>News Analysis</td>
</tr>
<tr>
<td>Feature Article</td>
</tr>
</tbody>
</table>
Table 2

<table>
<thead>
<tr>
<th>Editorial</th>
<th>An unsigned opinion piece that represents the views of the news organization’s editorial staff.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opinion Piece</td>
<td>An opinion article by a staff columnist or guest columnist. (If a guest columnist, the writer's credentials will almost always be identified.)</td>
</tr>
<tr>
<td>Review</td>
<td>An evaluation of a book, movie, album, live performance, etc.</td>
</tr>
</tbody>
</table>

Distinguishing between News and Opinion: An Example

Compare the two texts that follow. In the first, “Get Children Off Web and in Libraries,” the reporter quotes the opinions of others but does not offer her own opinions. In the second, “Why Libraries are Key,” the author explicitly takes a stand and seeks to persuade readers to adopt a particular position on an issue.

News

*Get children off web and in libraries, says Laureate*

Children are failing to learn properly because they are churning out facts copied from the internet instead of going to the library, according to the new Children's Laureate. Julia Donaldson, the best-selling author of *The Gruffalo*, set out her stall on the day of her appointment by speaking out against the government's planned library closures, arguing that they are vital for children's education.

1 Opinions are attributed to another person (Donaldson). They are not presented as the reporter's own view.

Source:

Opinion

*Why libraries are key to our kids' futures*

Children’s use of libraries has increased every year for the past six years. As the Children's Laureate I want to make sure that continues, and to do all I can to keep libraries open so that children can use them. Without this resource I'm convinced that we will have far fewer avid child readers and consequently lose a large percentage of our future adult readers.

2 Notice that the author presents her own views, credentials, and objectives.

Source:
News or Opinion? Test your understanding.

Identify each excerpt that follows as an example of news or opinion. (Discussion of each example appears at the end of this section.)

Jeremy Hunt: No Public Interest in Nude Prince Harry Photographs

Speaking to BBC News this morning, Mr. Hunt said: “Personally I cannot see what the public interest was in publishing those.”

"But we have a free press," he added, “and I don't think it is right for politicians to tell newspaper editors what they can and cannot publish. That must be a matter for the newspaper editors.”

He suggested that the public should give the Prince "a break," days after the daily tabloid published photographs obtained by gossip website TMZ.

Source:

Social Media Content Could Make, Break Professional Life

Do you remember your last tweet? What about last month’s Facebook or Instagram posts? It is all out there somewhere, and employers very well may see something that could hurt their opinion of you.

Tyler Willingham, a senior in marketing and a peer career adviser, was curious to know exactly what an employer’s goal is when perusing a prospective employee’s social media. After speaking with a mentor from a previous internship Willingham held, he found his answer.

“It's not really an issue of what they look for,” Willingham said, “but what they try not to find.” Career Services interim director Stephanie Kit said some of the things employers hope not to find are pictures and posts involving alcohol or drug usage, negative comments about a current or previous employer and any discriminatory content.

Source:

‘Kid Nation’ Lesson: Be Careful What You Pitch

On Friday, the American Federation of Television and Radio Artists, the union that represents performers but not contestants on reality shows, said it was investigating whether the children on “Kid Nation” should have been covered by the union’s work rules.

With “Kid Nation,” CBS confronted several new situations created by the fact that it was working with children rather than adults.
If “Kid Nation” had been set in California, New York or several other states, it would have been subject to laws that limit the amount of time a child could spend on the set of the program each day. It chose instead to shoot the program in New Mexico, where until this summer there was no law addressing children’s work on television or film productions.

That is not to say that New Mexico had not contemplated such limits. Before CBS took the 40 children to the state, its Legislature had already passed a bill that would have outlawed much of what CBS had planned.

On April 3, two days after CBS started shooting the 13-episode reality series, Gov. Bill Richardson of New Mexico signed the bill into law. It limits children ages 8 to 15 to eight to nine hours’ work a day on television and film productions.

On the set of “Kid Nation,” the children regularly worked more than 12 hours a day, and their contract required that they be available to the show’s producers to be videotaped 24 hours a day, seven days a week.

But because the new law was not scheduled to go into effect until June 15, roughly one month after “Kid Nation” finished production, lawyers for CBS have contended that everything they did was in compliance with the law “in effect at the time of production.”

But it is not clear whether CBS was in compliance. New Mexico child-labor statutes limit children under the age of 14 to 44 hours of work in one week and eight hours in any day, unless a special permit has been granted.

Source:

Sometimes, the Teachers Bully the Students

The government of Alberta has re-introduced its Education Act, which addresses the issue of student bullying in schools. The bill affirms that students are entitled to learning environments that are welcoming, caring, respectful and safe.

The government is to be commended both for its process in engaging the community, and for the resulting new provisions.

For example, the bill's definition of bullying acknowledges that bullying is intentional and repetitive, and that it can cause harm, fear and distress to victims in the school community. Moreover, the bill wisely addresses not just the situation where a student bullies fellow students, but where a student bullies other individuals in the school community. Such recognition that students can bully adults is important because research suggests that students often bully their teachers.

Yet, the bill fails to acknowledge that the imbalance of power between teachers and students creates an opportunity for bullying of students by adults. […] The bill ought to recognize and address the possibility of bullying behavior by adults who work in schools.

Source:
Discussion: Answers to News or Opinion? Test your understanding.

Jeremy Hunt: No Public Interest in Nude Prince Harry Photographs

News
- This piece deals almost exclusively with an opinion, but the opinion is not that of the author.
- Rather, the author is reporting on the opinion of a public figure (British Culture Secretary Jeremy Hunt).

Social Media Content Could Make, Break Professional Life

News
- This is an example of a "feature"-style news piece. The presentation is more creative than that of a news article, and the headline expresses a claim. But the author is still primarily reporting on the views of others.

‘Kid Nation’ Lesson: Be Careful What You Pitch

News
- This is an example of a "News Analysis" article. It does not merely report Who, What, Where, When, Why and How (though we do see these elements in the top paragraph) but rather attempts to provide readers with a better understanding of the broader context and complexities of the news event.

Sometimes, the Teachers Bully the Students

Opinion
- While the authors do report on the positions and research findings of others, they are essentially putting forward their own position.
- Notice that the opinions expressed in this piece are not attributed to others, as in the previous examples. The opinions belong to the authors.

Further Study

Journalistic norms and practices are always evolving. The rise of 24-hour cable news networks and the internet has led many traditional news outlets to differentiate themselves by offering more analysis, contextualization, and interpretation in their reporting. Another factor in this evolution has been a growing disenchantment with older ideals of detached reporting—especially the most rigid interpretation of these ideals, in which objectivity is understood to dictate a narrow focus on the surface details of news phenomena, and in which even identification of verifiable falsehoods in the statements of public officials might be considered a breach of journalistic objectivity.

For further study, see:
Facts, False Facts, Inference and Judgment

Written by Katie Friedman

A set of definitions used by skilled researchers makes for clear distinctions in what can and should be used in scholarly works. A careful examination of fact, false fact, inference, and judgment follows, and can be viewed online in the Prezi “Basic Writing: Fact, Inference, Judgment” at https://prezi.com/hiwr2qux9dxd/basic-writing-fact-inference-judgment/.

**Facts** are statements that are verifiable. Factual statements refer to what can be counted or measured or confirmed by reasonable observers or trusted experts.

Examples:
- There are 29 desks in Room 114.
- In the United States about 400,000 people die each year as a result of smoking.

**False Facts** are statements that sound like facts but are incorrect.

- There are 20 desks in Room 114 (when in fact there are actually 29).
- No studies have been done that link smoking to negative health issue.

**Inferences** are opinions based on fact. Inferences are the conclusions drawn from the analysis of facts.

Examples:
- There will not be enough desks in Room 114 for the next semester classes.
- Smoking is a serious health hazard.

**Judgments** are opinions based on values, beliefs, or philosophical concepts. (Judgments also include opinions based on personal preferences, but those are excluded from argument.) Judgments concern right and wrong, good and bad, better or worse, should and should not.

Examples:
- No more than 20 students should be enrolled in any English class.
- Cigarette advertising should be eliminated, and the federal government should develop an antismoking campaign.

Sometimes facts change as we learn more about our world. Ancient Greeks established early longitude and latitude measurements and theorized the world was round, but by the early 1400s, the world was believed to be flat. Sometimes "facts" are false facts. These are statements that sound like facts, but they are incorrect. In fact, The Flat Earth Society still purports that the Earth is flat and argues as such on the organization’s website.

In the previous examples, inference allowed for predictions of an increase in student enrollment for the next semester lead to the inference that classes in Room 114 will run with several more students than last year. Similarly, studies and statistics allow one to infer from the number of deaths that smoking is a health problem. Statistics show more people dying from tobacco than from AIDS, murder, or car
accidents. Inferences vary in their closeness to the facts supporting them. That the sun will rise tomorrow is an inference, but we count on its happening, acting as if it is a fact.

In considering judgment, to support the first judgment, we need to explain what constitutes overcrowding or what constitutes the best class size for effective teaching. If we can support our views on effective teaching, we may be able to convince the administration that ordering more desks is not the best solution to the problems caused by increased enrollment. The second judgment also offers to solve a problem, in this case, a national health problem. To reduce the number of deaths, we need to reduce the number of smokers, either by encouraging smokers to quit or not to start. The underlying assumption is that advertising does affect behavior.

We can classify judgments to see better what kind of assertion we are making and, therefore, what kind of support we need to argue effectively:

**Functional Judgments** are guidelines for judging how something or someone works or could work.

**Aesthetic Judgments** are guidelines for judging art, literature, music, or natural scenes.

**Ethical Judgments** are guidelines for group or social behavior.

**Moral Judgments** are guidelines of right and wrong for judging individuals and for establishing legal principles.

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**Exercise 1**

Determine in which category of judgment the following fit:

- Randy Johnson is the best pitcher to ever play the game of baseball.
- The sunrise was beautiful.
- It is rude to talk or use a cell phone during a movie.

---

**Exercise 2**

Compile a list of three statements of fact, inference and judgment about a related topic.

Example:

- The prom is in the spring.
- There will be underclassmen in attendance although it is the Junior-Senior Prom.
- Underclassmen should be prohibited from the prom.

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**References**

Primary, Secondary, and Tertiary Sources

Another way to categorize information is by whether information is in its original format or has been reinterpreted.

Another information category is publication mode, which has to do with whether the information is in its original form, a restatement or interpretation of original information, or something that summarizes original information.

Information may be one of these three categories:

Primary Source – Information in its original form, which is not translated by anyone else and has not been published elsewhere:

- A play
- A novel
- Breaking news
- An advertisement
- An eyewitness account
- A painting
- A report about a scientific discovery

Secondary Source – Repackaged, restatement, or interpretation of primary information:

- A book about an historical event.
- An article that critiques a novel, play or painting.
- An article or web site that summarizes and synthesizes several eyewitness accounts for a new understanding of an event.

Tertiary Source – An index or something that condenses or summarizes information:

- Almanacs
- Guide books
- Survey articles
- Timelines
- User guides
- Encyclopedias

Primary sources include those that can answer your research questions and convince your audience that your answer is the correct one or at least a reasonable one. However, in our discussion of mode, it’s important to recognize that academic disciplines vary in what kinds of sources they consider primary sources. In other words, different disciplines accept different sources as those that can speak with authority—as those that can meet the information needs of answering your research question and convincing your audience your answer is correct or at least reasonable.
For instance, in the humanities, sciences, and social sciences, peer-reviewed scholarly journal articles are considered the most authoritative. But in the arts, it is the art itself—for instance, the painting, the choral performance, the hip-hop dancing done on the street—that speaks most convincingly. That doesn’t mean you could never use a video of a hip-hop dancer in a project for sociology or other social science. But if you did, it would not be to answer your research question or to convince your audience you have the right answer. It would be to meet another information need—for instance, to describe the situation surrounding your research question for your audience or convince them it is important.

If you haven’t been able to tell what sort of sources your instructor considers able to answer your research questions and convince your audience, do ask him or her. It’s an important question, and he or she will probably be impressed that you know enough to ask it.

**Popular, Professional, and Scholarly**

The intended audience for a source tells us something about how the source can be used.

We can also categorize information by the expertise of its intended audience. Considering the intended audience—how expert one has to be to understand the information—can indicate whether the source has sufficient credibility and thoroughness to meet your need.

There are varying degrees of expertise:

**Popular** – Popular newspaper and magazine articles (such as *The Washington Post*, the *New Yorker*, and *Rolling Stone*) are meant for a large general audience, generally affordable, easy to purchase or available for free. They are written by staff writers or reporters for the general public.

Additionally, they are

- About news, opinions, background information, and entertainment.
- More attractive than journals, with catchy titles, attractive artwork, and many advertisements but no footnotes or references.
- Published by commercial publishers.
- Published after approval from an editor.
- Using news articles as sources (from newspapers in print and online, broadcast news outlets, news aggregators, news databases, news feeds, social media, blogs, and citizen journalism), needs careful scrutiny as to the quality of the source.

**Professional** – Professional magazine articles (such as *Plastic Surgical Nursing* and *Music Teacher*) are meant for people in a particular profession, often accessible through a professional organization. Staff writers or other professionals in the targeted field write these articles at a level and with the language to be understood by everyone in the profession.

Additionally, they are

- About trends and news from the targeted field, book reviews, and case studies.
- Often less than 10 pages, some of which may contain footnotes and references.
Types of Sources

- Usually published by professional associations and commercial publishers.
- Published after approval from an editor.

Scholarly – Scholarly journal articles (such as *Plant Science and Education* and *Child Psychology*) are meant for scholars, students, or the general public who want a deep understanding of a problem or issue. Researchers and scholars write these articles to present new knowledge and further understanding of their field of study.

Additionally, they are

- Where findings of research projects, data and analytics, and case studies usually appear first.
- Often long (usually over 10 pages) and always include footnotes and references.
- Usually published by universities, professional associations, and commercial publishers.
- Published after approval by peer review or from the journal’s editor.

Publication Formats and the Information Cycle

We can also categorize sources by publication format. That’s because of the difference in timing and effort sources in each format require for their production.

Sources in particular formats simply cannot exist until there has been enough time for people to create them. The result is that the sources that are created toward the end of the information cycle may come to very different conclusions about the event than did those sources created early on.

Sometimes the information presented in the later formats is more valid and reliable that what is in those produced earlier.

A very good example is that conclusions about Columbine and the causes of that tragedy reached by books—which took years to complete after the event—were likely to be very different than the conclusions reached by news coverage created early on. For instance, many early reports concluded that
the two teens responsible for the shooting had been shunned by their classmates and that it was the pain of their exclusion that had moved them to take revenge. Consequently, many K-12 schools nationwide took steps to try to ensure that all students felt included in their student bodies. But more time-consuming reportage concluded that the boys were not shunned (one had had a date for prom activities just days before) and that it was mental illness that made them kill their classmates.

A Closer Look at Common Formats

**Books** – Usually a substantial amount of information, published at one time, requiring great effort on the part of the author and a publisher.

**Magazines/Journals** – Published frequently, contain lots of articles, related to some general or specific professional research interest, edited, and selected.

**Newspapers** – Usually a daily publication of events of social, political and lifestyle interest.

**Websites** – Digital item, consisting of multiple pages produced by someone with technical skills or the ability to pay someone with technical skills.

**Articles** – A distinct, short, written piece that might contain photos and is generally timely. Timeliness can mean that it’s because it’s something that is of interest to readers at the point of publication or that is something the writer is thinking about or researching at a given point of time.

**Conference Papers** – Written form of a paper delivered at a professional or research-related conference. Authors are generally practicing professionals or scholars in the field.

**Blogs** – A frequently updated website that does not necessarily require extensive technical skills and can be published by virtually anyone for no cost to themselves other than the time they devote to content creation. Usually marked by postings that indicate the date when they were written.

**Documentaries** – A work, such as a film or television program, presenting political, social, or historical subject matter in a factual and informative manner and often consisting of actual news films or interviews accompanied by narration.

**Online Videos** – A short video produced by anybody, with a lot of money or a little money, about anything for the world to see. Common sites for these are YouTube and Vimeo.

**Podcasts** – A short audio or video produced by anybody, with a lot of money or a little money, about anything for the world to see. Common sites for these are YouTube and Vimeo.

Scholarly Articles as Sources

Why are articles in scholarly journals such valuable sources? It’s because they present new research on specific research questions, which makes them primary sources. And, when they are secondary sources, they are valuable because they review existing research in a field.
**Peer-Reviewed Sources**

The most-respected scholarly journals are peer-reviewed, which means that other experts in their field check out each article before it can be published. It’s their responsibility to help guarantee that new material is presented in the context of what is already known, that the methods the researcher used are the right ones, and that the articles contribute to the field.

Peer-reviewed articles are more likely to be credible. Peer-reviewed journal articles are the official scholarly record, which means that if it’s an important development in research, it will probably turn up in a journal article eventually.

**Parts of a Scholarly Article**

But, of course, the articles you use for your assignments must also be relevant to your research question—not just credible. Reading specific parts of an article can help save you time as you decide whether an article is relevant.

**Finding Scholarly Articles**

Most scholarly articles are housed in specialized databases. Libraries (public, school, or company) often provide access to scholarly databases by paying a subscription fee for patrons. For instance, PVCC Libraries provide access to many databases via its Research Databases List that are made available free to people affiliated with the college. You can search for a journal title or view a list of databases by subject in these databases.

Databases that aren’t subject-specific are called general databases. Google Scholar is a free general scholarly database available to all who have access to the Internet. For more information, see our section on using Google Scholar.

**News as a Source**

News sources can provide insights that scholarly sources may not or that will take a long time to get into scholarly sources. For instance, news sources are excellent for finding out people’s reactions, opinions, and prevailing attitudes around the time of an event.

**So whether news sources are good for your assignment depends on what your research question is.**

News is a strange term, because even when the information is old, it’s still news. Some sources are great for breaking news, some are great for aggregated (or compiled) news, and others are great for historical news.

While news was transmitted for centuries only in newspapers, news is now transmitted in all formats: via radio, television, and the Internet, in addition to print. Even most newspapers have Internet sites today.

News must be brief because much of it gets reported only moments after an event happens. News reports occur early in the Information Cycle.
When Are News Sources Helpful?

- You need breaking news or historical perspectives on a topic (what people were saying at the time).
- You need to learn more about a culture, place, or time period from its own sources.
- You want to keep up with what is going in the world today.

When Are News Sources of Limited Use?

- You need very detailed analysis by experts.
- You need sources that must be scholarly or modern views on a historical topic.

Mainline and Non-Mainline News Sources


News from non-mainline American news outlets is often mixed with opinions. One way they frequently exhibit bias is that they leave out pertinent facts. Some examples of non-mainline American news outlets: MSNBC, Fox News, Gawker, Reddit.

Types of News Sources

Press Services—News outlets (print, broadcast, and online) get a lot of their news from these services, such as Reuters or Associated Press (AP), that make it unnecessary for individual outlets to send their own reporters everywhere. These services are so broadly used that you may have to look at several news outlets to get a different take on an event or situation.

News aggregators—Aggregators don’t have reporters of their own but simply collect and transmit the news reported by others. Some sources pull news from a variety of places and allow for a single place to search for and view multiple stories. You can browse stories or search for a topic. Aggregators tend to have current, but not archival news. Google News and Yahoo News are examples.
Newspaper sites – Many print newspapers also have their own websites. They vary as to how much news they provide for free. Take a look at these examples:

- Puma Press, PVCC student newspaper
- Arizona Republic – AZ Central
- USA Today
- The Boston Globe
- Washington Post
- The Times of London
- China Daily, USA edition

Broadcast News Sites – Although broadcast news (from radio and television) is generally consumed in real time, such organizations also offer archives of news stories on their web sites. However, not all of their articles are provided by their own reporters: some originate from the press services, Reuters and AP. Here are some examples of broadcast new sites:

- ABC News
- BBC
- CNN
- NPR News

Social Media – Most of the news outlets listed above contribute to Twitter and Facebook. It’s customary for a highly condensed announcement in this venue to lead you back to the news outlet’s website for more information. Social media has built an interesting link between news and activism. It has also provided an accessible place for ordinary citizens to report their own breaking news.

Blogs – Sometimes these are good sources for breaking news as well as commentary on current events and scholarship. Authors who write more objectively elsewhere can share more insights and opinions, more initial questions and findings about a study before they are ready to release definitive data and conclusions on their research.

Citizen Journalism – A growing number of sites cater to those members of the general public who want to report breaking news and submit their own photos and videos on a wide range of topics. The people who do this are often referred to as called citizen journalists.

Examples of such sources include CNN iReport, Reddit, and Gawker. For more details on the history and development of citizen journalism, including addressing some of the pros and cons, read Mark Glaser’s “Your Guide to Citizen Journalism” at http://mediashift.org/2006/09/your-guide-to-citizen-journalism270/.

News Feeds – You can get updates on specific topics, or a list of major headlines, regularly sent to you so you don’t have to visit sites or hunt for new content on a topic. Look for links that contain headings such as these to sign up for news feeds:

- RSS feeds
- News Feeds
- News Alerts
- Table of Contents Alerts
Data as a Source

Researchers find data (quantitative or qualitative information) to describe people, places, events, or situations, back up their claims, prove a hypothesis, or show that one is not correct. In other words, they often use data to help answer their research questions.

Here are some hypotheses that would require data to prove:

- More women than men voted in the last presidential election in a majority of states.
- A certain drug shows promising results in the treatment of pancreatic cancer.
- Listening to certain genres of music lowers blood pressure.
- People of certain religious denominations are more likely to find a specific television program objectionable.
- The average weight of house cats in the United States has increased over the past 30 years.
- The average square footage of supermarkets in the United States has increased in the past 20 years.
- More tomatoes were consumed per person in the United Kingdom in 2015 than in 1962.

Researchers may find data on easily accessed web pages or buried in a database, book, or article that may or may not be on the open web.

Obtaining Data

There are two ways of obtaining data:

- Obtain data that already exists. (That’s what this section will cover.)
- Collect data yourself by making observations. This can include activities such as conducting surveys or interviews, directly recording measurements in a lab or the field, or even receiving electronic data recorded by computers/machines that gather the data. You will explore these activities in courses you take.

Data can be found all over the place. While you can, of course, use general web search engines to try to find data, there are several excellent tools for finding data on a wide range of topics.

- Budget of the United States Government
- U.S. Bureau of Justice Statistics
- National Center for Education Statistics
Types of Sources

Science Data:
- Census of Agriculture
- World Health Organization Statistical Information System
- EPA
- Center for Disease Control and Prevention

Finding Data in Articles, Books, Web Pages, and More

A lot of data can be found as part of another source—including web pages, books, and journals. In other words, the data do not stand alone as a distinct element, but rather are part of a larger work.

You could, of course, contact an author to request additional data. Researchers will discuss their data and its analysis—and sometimes provide some (or occasionally, all) of it. Some may link to a larger data set. A lot of data can be found as part of other a source—including web pages, books, and journals. In other words, the data do not stand alone as a distinct element, but rather are part of a larger work. Researchers will discuss their data and its analysis—and sometimes provide some (or occasionally, all) of it. Some may link to a larger data set. You could, of course, contact an author to request additional data.

Terms like statistics or data may or may not be useful search terms to use. Use these with caution, especially when searching library catalogs. (See information on the Library Catalog. More information on searching is at Precision Searching.)

Once you search for your topic, you may want to try skimming the items for tables, graphs, or charts. These items are summaries or illustrations of data gathered by researchers. However, sometimes data and interpretations are solely in the body of the text.

Depending on your research question, you may need to gather data from multiple resources to get everything you need. You may also find data gathered on the same topic give conflicting results. This is the reality of research. When this happens, you can’t just ignore the differences—you’ll have to do your best to explain why the differences occurred.

Proper Use of Data

Once you have your data, you can examine them and make an interpretation. Sometimes, you can do so easily. But not always.
What if...

...you had a lot of information? Sometimes data can be very complicated and may include thousands (or millions...or billions...or more) of data points. Suppose you only have a date and the high temperature for Columbus—but you have this for 20 years’ worth of days. Do you want to calculate the average highs for each month based upon 20 years’ worth of data by hand or even with a calculator?

...you want to be able to prove a relationship? Perhaps your theory is that social sciences students do better in a certain class than arts/humanities or science students. You may have a huge spreadsheet of data from 20 years’ worth of this course’s sections and would need to use statistical methods to see if a relationship between major and course grade exist.

You may find yourself using special software, such as Excel, SAS, and SPSS, in such situations.

Many people may have a tendency to look for data to prove their hypothesis or idea. However, you may find that the opposite happens: the data may actually disprove your hypothesis. You should never try to manipulate data so that it gives credence to your desired outcome. While it may not be the answer you wanted to find, it is the answer that exists. You may, of course, look for other sources of data; perhaps there are multiple sources of data for the same topic with differing results. Inconclusive or conflicting findings do happen and can be the answer (even if it’s not the one you wanted).

And, like with any other information resource, you should cite any data you use from a resource. If you found the data in a book, on a web page, or in an article, cite the data like you would those formats. If you used a database or downloaded a file, the citation style’s guide/manual should have directions for how to properly cite the data.
Chapter 2: Sources and Information Needs

It’s easier to find appropriate sources when you start with a plan.

This section and the section on Types of Sources work together. That’s because knowing the kinds of information in each category of sources will help you choose the right kind of information to meet each of your information needs. And some of those needs are very particular.

Information needs are why you need sources. Meeting those needs is what you’re going to do with sources as you complete your research project.

Here are those needs:

- To learn more background information.
- To answer your research question(s).
- To convince your audience that your answer is correct or, at least, the most reasonable answer.
- To describe the situation surrounding your research question for your audience and explain why it’s important.
- To report what others have said about your question, including any different answers to your research question.

Needs and Final Products

The verbs in the list of information needs above tell you exactly how you’ll use sources to carry out your research and create your final product: to learn, answer, convince, describe, and report. But you won’t be doing any of that alone.
Your sources will give you information with which to reason. They’ll also give you direct quotes and information to summarize and paraphrase as you create your final product. In other words, your sources will support you every step of the way during your research project.

Background information may seldom appear directly in any final product. But meeting each of the other information needs will result in written sections of a research paper. For other final products, you’ll have the same needs and will use sources to meet them, but not all needs will result in a section of your final product.

**EXAMPLE: Final Products & Information Needs**

On a poster about your own original research, you aren’t likely to have room to describe the situation surrounding your research question and why the question is important or to report what others have said about your question. But that doesn’t mean you didn’t meet those needs and others as you carried out your research—unlike a research paper or journal article, the poster format in which you reported it just had more limited space.

More specifically, in order to justify doing the research to yourself and your professor, you will have started by meeting the information need to describe the situation and why it is important. (Your instructor may or may not have you turn in that justification.) And in order to do research based on what has already been found out, you will have studied what others have already reported. Since every discipline requires its researchers to follow particular conventions when conducting and reporting research so as to produce results that are believable, you also will have tried to meet the need to convince your audience by your choice of what you report about your research after reading in sources how others have used the conventions for your discipline.

**Sources to Meet Needs**

Because there are several categories of sources, the options you have to meet your information needs can seem complex.

Our best advice is to pay attention to when only primary and secondary sources are required to meet a need and to when only professional and scholarly sources will work. If your research paper is in the arts, also pay attention to when you can or must use popular sources.

These descriptions and summaries of when to use what kind of resource should help.

**To Learn Background Information**

Get a good look at your topic through background reading.

When you first get a research assignment and perhaps for a considerable time afterward, you will almost always have to learn some background information as you develop your research question and explore how to answer it.

Sources from any category and from any subgroup within a category can meet students’ need to learn background information and understand a variety of perspectives—except journal articles, which are
usually too specific to be background. From easy-to-understand to more complex sources, read and/or view those that advance your knowledge and understanding.

For instance, especially while you are getting started, secondary sources that synthesize an event or work of art and tertiary sources such as guidebooks can be a big help. Wikipedia is a good tertiary source of background information.

Sources you use for background information don’t have to be sources that you cite in your final report, although some may be.

<table>
<thead>
<tr>
<th>Resources to Learn Background Information</th>
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</thead>
<tbody>
<tr>
<td>• Quantitative or Qualitative: Either—whatever advances your knowledge</td>
</tr>
<tr>
<td>• Fact or Opinion: Any—whatever advances your knowledge</td>
</tr>
<tr>
<td>• Scholarly, Professional or Popular: Any—whatever advances your knowledge</td>
</tr>
<tr>
<td>• Primary, Secondary or Tertiary: Any—whatever advances your knowledge</td>
</tr>
<tr>
<td>• Publication Format: Any—whatever advances your knowledge</td>
</tr>
</tbody>
</table>

One important reason for finding background information is to learn the language that professionals and scholars have used when writing about your research question. (It will help you later, particularly when you’re searching for sources to answer your research question.)

To identify that language, you can always type the word glossary and then the discipline for which you’re doing your assignment in the search engine search box.

Here are two examples to try:

- Glossary neuroscience.
- Glossary “social media marketing.”

(Putting a phrase in quotes in most search boxes insures that the phrase will be searched rather than individual words.)

**To Answer Your Research Question**

*Your research question may call for qualitative or quantitative sources.*

You have to be much more picky with sources to meet this need because only certain choices can do the job. Whether you can use quantitative or qualitative data depends on what your research question itself calls for.

Only primary and secondary sources (from the category called publication mode) can be used to answer your research question and, in addition, those need to be professional and/or scholarly sources for most disciplines (humanities, social sciences, and sciences). But the arts often accept popular sources as primary or secondary sources to answer research questions. Also, the author’s purpose for most disciplines should be to educate and inform or, for the arts, to entertain and perhaps even to sell. As you
may remember, primary sources are those created at the same time as an event you are researching or that offer something original, such as an original performance or a journal article reporting original research.

Secondary sources analyze or otherwise react to secondary sources. Because of the information cycle, the latest secondary sources are often the best because their creators’ have had time for better analysis and more information to incorporate.

**EXAMPLE: Quantitative or Qualitative Data**

Suppose your research question is “How did the previous king of Saudi Arabia (King Abdullah) work to modernize his country?”

That question may lend itself to qualitative descriptive judgments—about what are considered the components of modernization, including, for instance, what were his thoughts about the place of women in society.

But it may also be helped by some quantitative data, such as those that would let you compare the numbers of women attending higher education when Abdullah became king and those attending at the time of his death and whether manufacturing increased while he reigned.

So looking for sources that provide both quantitative and qualitative information (not necessarily in the same resource) is usually a good idea.

If it is not clear to you from the formats of sources you are assigned to read for your course, ask your professor which formats are acceptable to your discipline for answering your research question.

**Resources to Answer Your Research Question**

- **Quantitative or Qualitative:** Will be determined by the question itself.
- **Fact or Opinion:** Professional and scholarly for most disciplines; the arts often use popular, as well.
- **Scholarly, Professional or Popular:** Professional and scholarly for most disciplines; the arts often use popular, as well.
- **Primary, Secondary or Tertiary:** Primary and secondary.
- **Publication Format:** Those acceptable to your discipline.

**To Convince Your Audience**

Sources that meet the approval of your audience will be more convincing.

Convincing your audience is similar to convincing yourself and takes the same kinds of sources—as long as your audience is made up of people like you and your professor, which is often true in academic writing. That means using many of those sources you used to answer your research question.
When your audience isn’t very much like you and your professor, you can adjust your choice of sources to meet this need. Perhaps you will include more that are secondary sources rather than primary, some that are popular or professional rather than scholarly, and some whose author intent may not be to educate and inform.

**Resources to Convince Your Audience**

- **Quantitative or Qualitative Data**: Same as what you used to answer your research question if your audience is like you and your professor. If you have a different audience, use what is convincing to them.

- **Fact or Opinion**: Those with the purpose(s) you used to answer your research question if your audience is like you and your professor. If you have a different audience, you may be better off including some sources intended to entertain or sell.

- **Scholarly, Professional or Popular**: Those with the same expertise level as you used to answer the question if your audience is like you and your professor. If you have a different audience, you may be better off including some popular.

- **Publication Mode**: Primary and secondary if your audience is like you and your professor. If you have a different audience, you may be better off including more secondary sources than primary.

- **Publication Format**: Those acceptable your discipline, if your audience is like you and your professor.
To Describe the Situation

Use sources to frame the situation.

Choosing what kinds of sources you’ll need to meet this need is pretty simple—you should almost always use what’s going to be clear and compelling to your audience. Nonetheless, sources intended to educate and inform may play an out-sized role here.

But even then, they don’t have to educate and inform formally, which opens the door to using sources such as fiction or the other arts and formats that you might not use with some other information needs.

### Resources to Describe the Situation

- **Quantitative or Qualitative:** Whatever you think will make the description most clear and compelling and your question important to your audience.
- **Fact or Opinion:** Often to educate and inform, but sources don’t have to do that formally here so they can also be to entertain or sell.
- **Scholarly, Professional or Popular:** Whatever you think will make the description most clear and compelling and your question important to your audience.
- **Primary, Secondary or Tertiary:** Whatever you think will make the description most clear and compelling and your question important to your audience.
- **Publication Format:** Whatever you think will make the description most clear and compelling and your question important to your audience.

To Report What Others Have Said

Look for sources about how others have treated your research question.

The choices here about kinds of sources are easy: just use the same or similar sources that you used to answer your research question that you also think will be the most convincing to your audience.

### Resources to Report What Others Have Said

- **Quantitative or Qualitative:** Those sources that you used to answer your research question that you think will be most convincing to your audience.
- **Fact or Opinion:** Those sources that you used to answer your research question that you think will be most convincing to your audience.
- **Scholarly, Professional or Popular:** Those sources that you used to answer your research question that you think will be most convincing to your audience.
- **Primary, Secondary or Tertiary:** Those sources that you used to answer your research question that you think will be most convincing to your audience.
- **Publication Format:** Those sources that you used to answer your research question that you think will be most convincing to your audience.
Your Source Plan

Okay, so once you know what kinds of sources you need to meet your information needs, where should you look for them? Once more, thinking about categories can help.

Where sources are located is generally organized by audience expertise level—by whether they are popular, professional, or scholarly sources. Popular and professional are often grouped together. But scholarly sources tend to hang out by themselves. (That’s why searching Google Scholar locates more of them than just plain old Google, and an academic library has more scholarly sources than a public library.)

Before you start looking, try the Plan for Sources table that follows along with the suggestions made in this section to think through what sources you’ll need for your own research project. Having your Plan for Sources always at your side while you search for sources will guide where you look and what you’re willing to accept. It will help you keep track of whether you have found the right resources.

<table>
<thead>
<tr>
<th>PLAN FOR SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course:</td>
</tr>
<tr>
<td>Research Question:</td>
</tr>
<tr>
<td>Information Needs</td>
</tr>
<tr>
<td>To learn more background information</td>
</tr>
<tr>
<td>To answer your research question and convince your audience</td>
</tr>
<tr>
<td>To report what others have said</td>
</tr>
<tr>
<td>To describe the situation and why it’s important</td>
</tr>
</tbody>
</table>

Thinking through the types of sources you need to meet your information needs helps you target your search. You can download the Plan for Sources table at http://pvccenglish.files.wordpress.com/2018/08/planforsources.docx
### EXAMPLE: Sample “Plan for Sources” Table

<table>
<thead>
<tr>
<th>Information Needs</th>
<th>Kinds of Sources (Popular, Professional, or Scholarly) That Should Meet Each Need</th>
<th>Publication Formats Likely to be Helpful in Meeting Each Need</th>
<th>Where to Look</th>
</tr>
</thead>
<tbody>
<tr>
<td>To learn more background information</td>
<td>✔ Popular Professional</td>
<td>Any, including magazine articles, professional blogs, and association websites and publications</td>
<td>Google and Bing</td>
</tr>
<tr>
<td>To answer your research question and convince your audience</td>
<td>✔ Professional Scholarly</td>
<td>Books, Research journal articles, Conference papers</td>
<td>Library catalog, Library databases, Google Scholar</td>
</tr>
<tr>
<td>To report what others have said</td>
<td>✔ Professional Scholarly</td>
<td>Any, including professional blogs and association websites and publications, Research journal articles, Conference papers</td>
<td>Google and Bing, Library databases, Google Scholar</td>
</tr>
<tr>
<td>To describe the situation and why it’s important</td>
<td>✔ Popular Professional</td>
<td>Any, including magazine articles, professional blogs, and association websites and publications</td>
<td>Google and Bing</td>
</tr>
</tbody>
</table>
Chapter 3: Precision Searching

Effective searching takes precision. This section shows you how to perform several steps to make your searching more precise—you’ll turn up more sources that are useful to you and, more likely, sources that may be even crucial to your topic.

You’ve probably been searching in a more casual way for years and may wonder: Is going to the trouble of precision searching actually worth it?

Yes, definitely, for searches that are important to you! You’re in competition with many people who are working to be as skilled as they can be. So you should use as many of these steps as possible for course assignments and for information tasks you do on the job. With other tasks and searches, precision searching may be less important.

Search Strategy

This information on precision searching is based on how search tools such as Google and specialized databases operate. If you’ve been more casual in your searching practices, some of these steps may be new to you.

Starting with a research question helps you figure out precisely what you’re looking for. Next, you’ll need the most effective set of search terms—starting from main concepts and then identifying related terms. Those search terms need to be organized in the most effective way as search statements, which you actually type into a search box.

An important thing to remember is that searching is an iterative process: we try search statements, take a look at what we found and, if the results weren’t good enough, edit our search statements and search again—often multiple times. Most of the time, the first statements we try are not the best, even though Google or another search tool we’re using may give us many results.
It pays to search further for the sources that will help you the most. Be picky. Here are the steps for an effective search.

**Step 1: Identify Main Concepts**

Identify the main concepts in your research question by selecting nouns important to the meaning of your question and leaving out words that don’t help the search, such as adjectives, adverbs, prepositions and, usually, verbs. Nouns that you would use to tag your research question so you could find it later are likely to be its main concepts.

Finding the main concepts in a research question is a lot like finding the main idea in an essay or story. Often the main idea is in the first paragraph, but not always. Sometimes it’s in a later paragraph or even in the conclusion. The same is true with research questions—the main concepts can be at the beginning, middle, or end. Stick to the nouns and only what’s necessary, not already implied. Don’t read in concepts that are not really there. Be alert to words that may have connotations other than the concept you are interested in. For instance, if you identify depression as a main idea, beware that the search engine won’t automatically know whether you mean depression as a psychological state or as a condition of the economy or as a weather characteristic.

**EXAMPLE: How are birds affected by wind turbines?**

The main concepts are *birds* and *wind turbines*. Avoid terms like *affect* and *effect* as search terms, even when you’re looking for studies that report effects or effectiveness.

**EXAMPLE: What lesson plans are available for teaching fractions?**

The main concepts are *lesson plans* and *fractions*. Stick to what’s necessary. For instance, don’t include: *children*—nothing in the research question suggests the lesson plans are for children; *teaching*—teaching isn’t necessary because lesson plans imply teaching; *available*—available is not necessary.

Sometimes the questions themselves can seem complicated. Make sure you’ve stated the question as precisely as possible (as you learned in Research Questions). Then apply our advice for identifying main concepts as usual.

**EXAMPLE: Does the use of mobile technologies by teachers and students in the classroom distract or enhance the educational experience?**

Acceptable main concepts are *teaching methods* and *mobile*. Another possibility is *mobile technologies* and *education*.

Watch out for overly broad terms. For example, don’t include: *educational experience*—this choice misses mobile technology; *classroom distractions*—classroom distractions is also too broad because there are many distractions that have nothing to do with technology; *technology* or *education*—these terms are too broad since the question is focused on mobile technology.
Step 2: List Related Terms

For each main concept, list alternative terms, including synonyms, singular and plural forms of the words, and words that have other associations with the main concept.

Sometimes synonyms, plurals, and singulants aren’t enough. So also consider associations with other words and concepts. For instance, it might help, when looking for information on the common cold, to include the term virus—because a type of virus causes the common cold.

Check to make sure that your terms are not too broad or too narrow for what you want. Figuring out what’s too broad or too narrow takes practice and may differ a bit with each search.

TIP: Try a Thesaurus

Have you considered using a thesaurus, such as thesaurus.com? Or adding a thesaurus to your browser search bar?

ACTIVITY: Finding Synonyms

When figuring out search terms, you can try your search terms in Visuwords <visuwords.com>, an online graphical dictionary, to see the connections visually in a diagram reminiscent of a neural net. It can help you see connections between terms that it’s easy not to think of.

Subject Headings Instead of Keywords

All the searches we have talked about so far have been keyword searches, usually used in search engines. But sometimes it pays to use tools—such as library catalogs and journal article databases—that have subject headings. Subject headings are standardized terms that are assigned by trained experts. (Some such tools also allow keyword searching.)

Step 3: Form Search Statements

At this point in your search process, you are moving from merely identifying main concepts and similar search terms to developing more complicated search statements that can do more precise searching.

Use Quotation Marks for Phrases

Put quotation marks around any phrases among your terms so that the phrase is what’s searched for, rather than the separate words. “Common cold” instead of common cold is a good example. Without those quotation marks, just think how many sources Google or other search tools would waste their/your time on things that have nothing to do with our sniffles.
Putting a phrase in quotes returns results containing that phrase, and not the individual words.

**Use Wildcard and Truncation Symbols to Broaden**

Consider whether using wild card or truncating symbols would help find variations of a word(s). For instance, the wildcard symbol in wom?n finds both woman and women, and the truncating symbol in mathematic* finds mathematics, mathematically, mathematician, etc.

Using wildcard characters allows you to find variations on a word.

**Consider AND, OR, NOT**

You can often do more precise searching by combining search terms by using the words AND, OR and NOT. These are known as Boolean Operators. Generally, using these operators narrows your search, making it more precise.

The Boolean operators AND, OR, and NOT exclude or include subsets of sources.

**AND** – If the main idea contains 2 or more ideas, you’ll want to use AND to combine them. To look for information about spiders as signs of climate change you’ll want to have both terms in the search and are performing an AND search. That’s what automatically happens in search engines such as Google and Bing unless you tell them to do something different by using OR or NOT.

**OR** – If the main idea has several synonyms, use OR to combine them. Most search tools search for all terms (AND) by default, so you need to use the term OR between terms to let it know you want to find any of the terms. In the previous example of Latino small business growth, we would want to also use the term Hispanic.
NOT – If the main idea has a common use you want to exclude, use NOT to exclude that word. For example, if we were looking for information about illegal drug use we would want to exclude prescription drugs from the search results. This is commonly done with NOT or the use of the Minus (-) sign. (When using some search tools, use AND NOT before the term.)

Using Parentheses with Multiple Operators

When a search requires the use of more than one Boolean operator, use parentheses to group the terms with each Boolean. Doing that usually involves putting parentheses, quotation marks, and Boolean operators (AND, OR, NOT or their symbols) in specific places in the search statement. (The operators or symbols used can vary from search tool to search tool, but the concepts are the same.)

The resulting arrangements connect terms, remove terms, and organize search terms in complex ways, much like you might write mathematical statements.

### EXAMPLE: “United States” AND (immigration or emigration)

Can you tell that the searcher wants to find information about the United States’ immigration or emigration?

The searcher will find more with this arrangement than would turn up if the arrangement had been “United States” immigration emigration. That’s because the latter arrangement without parentheses would find only information that was about both United States immigration and emigration, instead of either.

### EXAMPLE: (cats OR dogs) AND (treatment OR therapy)

Can you tell that the searcher wants to find information about either treatment or therapy for either cats or dogs?

That’s a different search from what the searcher would have gotten if this arrangement had been used: cats dogs treatment therapy. Anything found with the later arrangement without parentheses would have had to be about both—not just either—therapy and treatment for both—not just either—cats and dogs. So the latter arrangement would have turned up fewer pieces of information.

Step 4: Search Iteratively, Practice Exercise

Take some time to practice searching precisely—start by identifying main concepts, then listing related terms (with the help of wildcard and truncation symbols), and finally constructing search statement.
Library Catalog

The Paradise Valley Community College library catalog contains records for all the items owned or licensed by Maricopa Community College District Libraries and is searchable online. It also includes a circulation system that is used to check out materials. Students can use the system to have books and other materials quickly sent to the library from other campuses.

Items in the catalog include books, journals, documents, maps, movies, and recordings.

When to Use It

Use the library catalog to search for items that you can access with your MEID username and password, to locate where those materials are stored, and to request them.

Note that PVCC’s library catalog

- Does not contain the full-text of any materials. However, some items may include a table of contents and a link to full-text digital content.
- Does not contain specific articles. The catalog can only tell you whether a periodical title is available.

How to Use It

To access the catalog, choose the One Search tab on the Paradise Valley Community College Library’s main page at https://www.paradisevalley.edu/library.

Search Types

The catalog allows searching by author, title, journal title, subject, and keyword as well as specialty numbers such as the Library of Congress call number and ISBN (International Standard Book Number). There is also an option for advanced search.
Additional tips:

- Keyword searches are the broadest search, as they span all information in an item record. (The search tips in Precision Searching, are based on using keywords.)
- Subjects are a very specific set of terms that are helpful for precision searches. Often, the easiest way to find subject terms is to do a keyword search and look at the subject terms for those that are good matches for your topic.
- The Advanced Search screen allows a few additional search capabilities, such as multiple search fields to narrow the scope of a search term. You can also limit by year range, language, location, or format.

Narrowing Searches

- To specific databases – From the Search All tab, click the Advanced Search link to get access to other search options, including selecting specific databases.

Google Scholar

Google Scholar is a tool for finding books and journal articles that you might normally get from a library. Where possible, it provides links to online versions and to library copies to help you locate an item.
**When to Use It**

Use Google Scholar to find scholarly articles and books, verify citations, and explore related resources. When books are available through Google Books, some of their content may be available online.

**How to Use It**

Go to Google Scholar (http://scholar.google.com).

**MOVIE: Using Google Scholar**

Watch this tutorial on the basics of Google Scholar use.

https://www.youtube.com/watch?v=t1ZwgDeX2eQ

**Additional Tips**

- Authors related to your search are shown in the left column to help you find related content. The Recent Articles link allows you to limit your search results by date.
- Advanced Scholar Search provides additional search fields such as author, publication, and date, as well as phrase matching and word exclusion. You can also limit by subject area.

**Keyword Searching**

Although keyword search principles apply, you may want to use fewer search terms since the optimal number of terms is related to database size. Google and Bing work best with several terms since they index billions of web pages and additional terms help narrow the results; each scholarly database indexes a fraction of that number so you are less likely to be overwhelmed by results even with one or two keywords.

Phrase searching (putting multiple words in quotes so Google or Bing will know to search them as a phrase) is also less helpful in specialized databases because they are smaller and more focused. Databases are better searched by beginning with only a few general search terms, reviewing your results and, if necessary, limiting them in some logical way. (See Limiting Your Search below.)

**Limiting Your Search**

Many databases allow you to choose which areas (also called fields) of items to search for your search term(s), based on what you think will turn up documents that are most helpful.

For instance, you may think the items most likely to be helpful to you are those whose titles contain your search term(s). In that case, your search would not show you any records for items whose titles do not have your term(s). Or maybe you would want to see only records for items whose abstracts contain the term(s).

When this feature is available, directing your search to particular parts of items, you are said to be able to “limit” your search. You are limiting your search to only item parts that you think will have the biggest pay-off at distinguishing helpful items from unhelpful items.
Searching fields such as title, abstracts, and subject classification often gives helpful items.

**TIP: Full-Text Searches**

Some databases allow for full-text searching, but this option includes results where a search term appears only once in dozens or more pages. Searching fields such as title, abstracts, and subject classification will often give more relevant items.

**Subject Heading Searching**

One precision searching technique may be helpful in databases that allow it, and that’s subject heading searching. Subject heading searching can be much more precise than keyword searching, as you are sure to retrieve only your intended concept.

Subject searching is helpful in the following situations:

- There are multiple terms for the same topic you’re interested in (example: cats and felines).
- There are multiple meanings for the same word (example: cookie the food and cookie the computer term).
- There are terms used by professionals and terms used by the general public, including slang or shortened terms (example: flu and influenza).

Here’s how it works:

Database creators work with a defined list of subject headings, which is sometimes called a controlled vocabulary. That means the creators have defined which subject terms are acceptable and assigned only those words to the items it contains. The resulting list of terms is often referred to as a thesaurus. When done thoroughly, a thesaurus will not only list acceptable subject headings, but will also indicate related terms, broader terms and narrower terms for a concept.

**TIP: Finding Useful Subject Headings**

Try this strategy to find useful subject headings. Remember it by thinking of the letters KISS:

- **K**eypoint-search your topic.
- **I**dentify a relevant item from the results.
- **S**elect subject terms relevant to your topic from that item’s subject heading.
- **S**earch using these subject terms. (Some resources will allow you to simply click on those subject terms to perform a search. Others may require you to copy/paste a subject term[s] into a search and choose a subject field.)
Web Search Engines

Web search engines use special software programs (called robots, spiders, or crawlers) to find web pages and list (or index) all words within each one to make searching large quantities of page faster. Indexes capture the largest amount of information on the Web, but no index lists everything on the Internet.

Commonly used search engines include Google (https://www.google.com) and Bing (http://www.bing.com).

In addition to search engines, there are also

- Specialized web search engines – A tool that has a specialty, usually either a subject or format focus. It ignores the rest of the information on the web. Examples include science.gov (http://www.science.gov/) and TinEye Reverse Image Search (https://www.tineye.com).
- Metasearch engines – Tools that search multiple web search engines and gives you results from all of them. Some of these return the best results from the search engines they search. Examples include Dogpile (http://www.dogpile.com) and Crawler (https://www.webcrawler.com).
- Web directories – Tools created by editors or trained researchers who categorize or classify websites by subject. Directories are more selective than search engines. An example includes Ipl2 (http://www.ipl.org).

When to Use

Web Search Engines and related web search tools are helpful for locating background information, news (especially if it’s recent), and public opinion.

However, scholarly information is often not available through a regular web search. If you do find scholarly information through a web search engine, especially if you are off campus, you may be asked for payment to access it. The PVCC library can usually get you what you need without additional payment.

Remember to follow the advice in Source Evaluation to determine whether information you locate online is suitable for your information needs.

How to Use

See links above. Use of each tool varies. If a search engine has an advanced search, it may include options such as specifying format, language, domain, or date range.

Tips for Common Search Tools

Academic Search Premier

- **AND:** default (alternatively: term AND term)
- **OR:** term OR term
- **NOT:** term NOT term
• **Exact Phrase**: “exact phrase search”  
• **Grouping**: term AND (term OR term)

**Bing**

• **AND**: default  
• **OR**: term OR term  
• **NOT**: term NOT term  
• **Exact Phrase**: “exact phrase search”  
• **Grouping**: Not available

**Google**

• **AND**: default  
• **OR**: term OR term  
• **NOT**: term NOT term  
• **Exact Phrase**: “exact phrase search”  
• **Grouping**: term AND (term OR term)
Source evaluation usually takes place in two stages:

- First you try to determine which sources are credible and relevant to your assignment.
- Later, you try to decide which of those relevant and credible sources contain information that you actually want to quote, paraphrase, or summarize. This requires a closer reading, a finer examination of the source.

This lesson teaches the first kind of evaluation—how to “weed out” sources that are irrelevant and not credible and how to “weed in” those that are relevant enough and credible enough.

Because there often aren’t clear-cut answers when you evaluate sources, most of the time you have to make inferences—educated guesses from available clues—about whether to use information from the website or other source.

The clues are factors you should consider when trying to decide whether a source is relevant and credible:

- A relevant source of information: Is it truly about your topic and from the right time period?
- A credible source of information: Is there sufficient reason to believe it’s accurate?

**Good Enough for Your Purpose**

Not every resource you turn up in your searches will be credible and relevant enough to meet your information needs. So, how will you ferret out the very best to use?
Sources should always be evaluated relative to your purpose—why you’re looking for information.

Your information needs will dictate

- What kind of information will help.
- How serious you consider the consequences of making a mistake by using information that turns out to be inaccurate. When the consequences aren’t very serious, it’s easier to decide a site and its information are good enough for your purpose. Of course, there’s a lot to be said for always having accurate information, regardless.
- How hard you’re willing to work to get the credible, timely information that suits your purpose. (What you’re learning here will make it easier.)

Thus, your standards for relevance and credibility may vary, depending on whether you need, say

- Information about a personal health problem.
- An image you can use on a poster.
- Evidence to win a bet with a rival at work.
- Dates and times a movie is showing locally.
- A game to have fun with.
- Evidence for your argument in a research paper.

For your research assignments, the consequences may be great if you use information that is not relevant or not credible.

**What Do You Already Know**

You must already be continually evaluating information sources in your personal life. Think for a minute about what information you have acted on today (where to go, what to do, what to eat, whether to read this page, etc.). What helped you decide whether the information was relevant and credible? Which of the factors below do you consider to be criteria for evaluating sources of information?

- My instructor recommended the source.
- Other sources I like are linked to it.
- I know who runs the site.
- Its information makes sense with what I already know.
- I recognize the truth when I see it.
- The site fits with how I was raised.
- All my friends accept its information / A friend recommended the website.
- I’ve used similar sources before / I’ve used the source before and nothing bad happened.
- The website is easy to use / It has all the information I need so I don’t have to go to a lot of sites.
- What kind of site it is / The website looks professional.

You probably chose at least several factors that we would agree with. Take a look at what we recommend on the next page.
Evaluating Websites

What are the clues for inferring a source’s relevancy and credibility? Let’s start with evaluating websites, since we all do so much of our research online. But we’ll also include where to find clues relevant to sources in other formats when they differ from what’s good to use with websites. Looking at specific places in the sources will mean you don’t have to read all of every resource to determine its worth to you.

Note: Since we all do so much of our research online, this lesson emphasizes how to evaluate websites as sources. But along the way, we’ll interject information about evaluating sources in other formats, too, when it differs from what’s used with websites.

What Used to Help

It used to be easier to draw conclusions about an information source’s credibility, depending on whether it was a print source or a web source. We knew we had to be more careful about information on the Web—simply because all the filters that promoted accuracy involved in the print publishing process were absent from most web publishing. After all, it takes very little money, skill, and responsible intent to put content on the Web, compared with what has to be done to convince print publishers your content is accurate and that they will make money by printing it.

However, many publishers who once provided only print materials have now turned to the Web and have brought along their rigorous standards for accuracy. Among them are the publishers of government, university, and scholarly (peer-reviewed) journal websites. Sites for U.S. mainline news organizations also strive for accuracy rather than persuasion—because they know their readers have traditionally expected it. All in all, more websites now take appropriate care for accuracy than what used to be true on the web.

Nonetheless, it still remains very easy and inexpensive to publish on the Web without any of the filters associated with print. So we all still need the critical thinking skills you’ll learn here to determine whether print’s and websites’ information is credible and relevant enough to suit your purpose.

Evaluation Criteria by Acronym

Librarians and instructors have created myriad tools to assist writers in evaluating the credibility of their sources. Several of these methods are based on the acronyms CRAAP, CARBS, and DUPED.

First, and usually remembered because of its clever acronym: The CRAAP Test. It was first developed through the Meriam Library & California State University, Chico.

<table>
<thead>
<tr>
<th>Currency:</th>
<th>The timeliness of the information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• When was the information published or posted?</td>
</tr>
<tr>
<td></td>
<td>• Has the information been revised or updated?</td>
</tr>
<tr>
<td></td>
<td>• Does your topic require current information, or will older sources work as well?</td>
</tr>
<tr>
<td></td>
<td>• Are the links functional?</td>
</tr>
<tr>
<td><strong>Relevance:</strong></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
</tr>
<tr>
<td><em>The importance of the information for your needs</em></td>
<td></td>
</tr>
<tr>
<td><strong>Authority:</strong></td>
<td></td>
</tr>
<tr>
<td><em>The source and qualifications of the information</em></td>
<td></td>
</tr>
<tr>
<td><strong>Accuracy:</strong></td>
<td></td>
</tr>
<tr>
<td><em>The reliability, truthfulness and correctness of the content</em></td>
<td></td>
</tr>
<tr>
<td><strong>Purpose:</strong></td>
<td></td>
</tr>
<tr>
<td><em>The reason the information exists</em></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Relevance:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the information relate to your topic or answer your question?</td>
</tr>
<tr>
<td>Who is the intended audience?</td>
</tr>
<tr>
<td>Is the information at an appropriate level (i.e. not too elementary or advanced for your needs)?</td>
</tr>
<tr>
<td>Have you looked at a variety of sources before determining this is one you will use?</td>
</tr>
<tr>
<td>Would you be comfortable citing this source in your research paper?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Authority:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is the author/publisher/source/sponsor?</td>
</tr>
<tr>
<td>What are the author's credentials or organizational affiliations?</td>
</tr>
<tr>
<td>Is the author qualified to write on the topic?</td>
</tr>
<tr>
<td>Is there contact information, such as a publisher or email address?</td>
</tr>
<tr>
<td>Does the URL reveal anything about the author or source? examples: .com .edu .gov .org .net</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Accuracy:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Where does the information come from?</td>
</tr>
<tr>
<td>Is the information supported by evidence?</td>
</tr>
<tr>
<td>Has the information been reviewed or refereed?</td>
</tr>
<tr>
<td>Can you verify any of the information in another source or from personal knowledge?</td>
</tr>
<tr>
<td>Does the language or tone seem unbiased and free of emotion?</td>
</tr>
<tr>
<td>Are there spelling, grammar or typographical errors?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Purpose:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the purpose of the information? Is it to inform, teach, sell, entertain or persuade?</td>
</tr>
<tr>
<td>Do the authors/sponsors make their intentions or purpose clear?</td>
</tr>
<tr>
<td>Is the information fact, opinion or propaganda?</td>
</tr>
<tr>
<td>Does the point of view appear objective and impartial?</td>
</tr>
<tr>
<td>Are there political, ideological, cultural, religious, institutional or personal biases?</td>
</tr>
</tbody>
</table>
Next, a Paradise Valley Community College Library Lib Guide helps writers evaluate sources so that you do not get DUPED.

| **Dated** | • Is the most up-to-date information included – what is your proof?  
• Does currency of the information matter for your topic or not (e.g. healthcare, technology vs. history, literature)? Why or why not? |
| **Unclear** | • Does the information present fact, opinion, or both? Provide an example.  
• Does the information maintain a fair and balanced perspective with a minimum of bias or opinion? If not, does this opinion help your research? Provide an example. |
| **Purpose** | • What is the purpose of the information (to inform, to entertain or to persuade)? Provide an example.  
• Who is the intended audience? Provide an example FOR BOTH. |
| **Expertise** | • Is the author or publisher an expert? Provide an example of the author’s EXPERTISE (i.e., their education or expertise for writing on the topic, reputation or where they work).  
• What expertise did the author provide on your topic? |
| **Determine** | • How does incorporating this information into your paper or project increase YOUR credibility as a researcher?  
• How does the information provide a unique contribution to your own paper or project?  
• Is the information relevant to your thesis statement, your premises, or the scope of your project? Explain the relevance. |
And finally, CARBS, according to the Paradise Valley Community College library website:

| Currency                              | • Can you tell how current the information is?  
|                                      | • When was it last updated?                     |
| Authority                             | • Who is the author?                           
|                                      | • Is the person an authority in the field?     
|                                      | • Remember, an author can be an organization, 
|                                      |   government agency, advocacy group, etc.       |
| Relevancy                             | • Does this piece contribute something unique 
|                                      |   to your paper?                               
|                                      | • Does it offer something that other sources do 
|                                      |   not?                                         
|                                      | • Make sure that it contributes to the overall 
|                                      |   balance of your paper.                       |
| Biased or Factual                     | • Most sites will have some inherent bias. This 
|                                      |   doesn’t mean you can’t use them—just be      
|                                      |   aware of the bias, and balance it with more  
|                                      |   objective, factual pages whenever possible.  |
| Scholarly or Popular                  | • The information may be completely accurate   
|                                      |   and reliable, but if it was written for a non- 
|                                      |   scholarly audience, it may not be the best    
|                                      |   choice for a research paper.                 |

**Six Factors to Consider: An Alternate Evaluation**

Evaluating a website means considering the six factors below in relation to your purpose for the information. These factors are what you should gather clues about and use to decide whether a site is right for your purpose:

1. The source’s neighborhood on the Web.
2. Author and/or publisher’s background.
3. The degree of bias.
4. Recognition from others.
5. Currency of the content.
6. Thoroughness of the content.

How many factors you consider at any one time depends on your purpose when seeking information. In other words, you’ll consider all six factors when you’re looking for information for a research project or other high-stakes situation where making mistakes have serious consequences. But you might consider only the first three factors for many of your other information needs.
Chapter 4: A Source's Neighborhood

To understand this concept and begin to use it, imagine that all the sites on the web constitute a community. Just like in a geographical community, there are neighborhoods in which individual sites "hang out."

Thinking about what neighborhood a source is in on the Web can help you decide whether the site is credible, relevant, and suits your purpose.

TIP: Author’s Purpose for Print

Rather than examine print sources for their web neighborhood, examine them for their author’s purpose. Read the introduction and conclusion and look at the table of contents to discern the author’s purpose.

For instance, did the author intend to use the book or magazine article to inform/educate, persuade, sell, or entertain?

And is the author’s purpose suitable for your purpose? For instance, does the fact that a resource was intended to persuade mean it can’t help you answer your research question?

On a website, check pages labeled About This Site, Mission, Site Index, and Site Map, if available. (If such pages or similarly labeled ones don’t exist, it may be a sign that the site may be less trustworthy.)
Ask yourself these questions to gather clues that will help you decide what neighborhood you’re in:

- **Is the site selling products and/or services (even if there are articles and other useful information, too)?** Perhaps it’s a retail, service center, or corporate site.
- **Are there membership applications and requests for contributions of money or time anywhere on the site?** They’re usually a sign that you’re on a site that promotes particular ideas or behavior—in other words, they’re in the advocacy neighborhood.
- **Do postings, articles, reports, and/or policy papers give a one-sided view or multiple views on issues, people, and events?** If they’re one-sided, the site is probably a commercial site or in the advocacy group neighborhood. If the information is even-handed and includes different sides of an issue, the site is more likely to be on the library/museum, school, or traditional U.S. news side of town. Sites there usually provide information designed to educate rather than persuade. (This does not apply to material labeled something like Opinion, of course, just as it doesn’t apply to the editorial pages of print newspapers.)

**EXAMPLE: Check Them Out**

Think we’re making a mountain out of a molehill about being careful about web sources? Please click the web icons below to look at three websites. Is there an inference(s) you can make that applies to all three? Perhaps that whether a website looks professionally done is not enough to insure it is credible.

- RYT Hospital: Dwayne Medical Center – http://rythospital.com
- Dog Island – http://www.thedisland.com
- The Manhattan Airport Foundation – http://manhattanairport.org

**Making the Inference**

Consider the clues. Then decide the extent that the site’s neighborhood is acceptable for your purpose. It might help to grade the extent that this factor contributes to the site being suitable on a scale like this one:

A – Very Acceptable
B – Good, but could be better
C – OK in a pinch
D – Marginal
F – Unacceptable

You’ll want to make a note of the resource’s grade for neighborhood so you can combine it later with the grades you give the other factors.

**ANSWER TO ACTIVITY: Self-Check**

The answer to the “Self-Check” Activity above:

Advocacy sites are useful to learn about a particular viewpoint. They may provide a wealth of information—you just have to keep in mind that it’s just one side’s view and then also seek out the other side’s view.
Two: Author and Publisher

The reputation of the author and publisher influences your confidence in a source.

You’ll always want to know who’s providing the information for a website or other source. Do they have the education, training, or other experience that make you think they are authorities on the subject covered? Or do they just have opinions?

The more you know about the author and/or publisher, the more confidence you can have in your decision for or against using content from that source.

Authors and publishers can be individuals or organizations, including companies. (Web masters usually put things on the site, but do not decide what goes on all but the smallest websites. They often just carry out others’ decisions.)

Sites that do not identify an author or publisher are generally considered less credible for many purposes, including research papers and other high-stakes projects. The same is true for sources in other formats.

Clues About an Author’s and/or Publisher’s Background

If they’re available, take a look at pages called such things as About This Site, About Us, or Our Team first. But you may need to browse around a site further to determine its author. Look for a link labeled with anything that seems like it would lead you to the author. Other sources, like books, usually have a few sentences about the author on the back cover or on the flap inside the back cover.

You may find the publisher’s name next to the copyright symbol, ©, at the bottom of at least some pages on a site. In books the identity of the publisher is traditionally on the back of the title page.

Sometimes it helps to look for whether a site belongs to a single person or to a reputable organization. Because many colleges and universities offer blog space to their faculty, staff, and students that uses the university’s web domain, this evaluation can require deeper analysis than just looking at the address.
Personal blogs may not reflect the official views of an organization or meet the standards of formal publication.

In a similar manner, a tilde symbol (~) preceding a directory name in the site address indicates that the page is in a “personal” directory on the server and is not an official publication of that organization. For example, you could tell that Jones’ web page was not an official publication of XYZ University if his site’s address was: http://www.XYZuniversity.edu/~jones/page.html. The tilde indicates it’s just a personal web page—in the Residences, not Schools, neighborhood of the Web.

Unless you find information about the author to the contrary, such blogs and sites should not automatically be considered to have as much authority as content that is officially part of the university’s site. Or you may find that the author has a good academic reputation and is using their blog or website to share resources he or she authored and even published elsewhere. That would nudge him or her toward the Schools neighborhood.

Learning what they have published before can also help you decide whether that organization or individual should be considered credible on the topic. Listed below are sources to use to look for what the organization or individual may have published and what has been published about them.

**TIP: Find Out What the Author (Person or Organization) Has Published**

**Library Catalogs** – Search in a large library catalog to find books written by the author.

**Web Article Database** – Use a free web article database to search for articles by this author. Note: While you can search for free, you may not be able to retrieve articles unless searching through a library.

For example:

- Google Scholar
- MagPortal.com

**Specialized Database** – Locate articles written by the author by using a specialized database that covers the same topical area as information on the website. Check your library’s website to find databases that you can use for this purpose. (Such databases are also called periodical indexes.)

For example:

- Use ERIC to locate any articles published by the author of an education website.
TIP: Find Out What Has Been Written about the Author

**Web Search Engine** – Use a search engine to find web pages where the author’s name is mentioned. (Be sure to search for the name as a phrase, as in “Jane Doe.”)

For example:
- Google
- Yippy

**Full-Text Article Database** – Use a database that searches the full-text of articles (not just descriptive information about the article) to find those that mention people and organizations.

**Specialized Biographical Sources** – Use directories and indexes provided by your library to find backgrounds of people.

Making the Inference

Consider the clues. Then decide the extent that the source’s author and/or publisher is acceptable for your purpose. It might help to grade the extent that this factor contributes to the site being suitable on a scale like this one:

- A – Very Acceptable
- B – Good, but could be better
- C – OK in a pinch
- D – Marginal
- F – Unacceptable

You’ll want to make a note of the source’s grade for author and/or publisher so you can combine it later with the grades you give the other factors.

Three: Degree of Bias

Most of us have biases, and we can easily fool ourselves if we don’t make a conscious effort to keep our minds open to new information. Psychologists have shown over and over again that humans naturally tend to accept any information that supports what they already believe, even if the information isn’t very reliable. And humans also naturally tend to reject information that conflicts with those beliefs, even if the information is solid. These predilections are powerful. Unless we make an active effort to listen to all sides we can become trapped into believing something that isn’t so, and won’t even know it.

— A Process for Avoiding Deception, Annenberg Classroom

Probably all sources exhibit some bias, simply because it’s impossible for their authors to avoid letting their life experience and education have an effect on their decisions about what is relevant to put on the site and what to say about it.
But that kind of unavoidable bias is very different from a wholesale effort to shape the message so the site (or other source) amounts to a persuasive advertisement for something important to the author.

Even if the effort is not as strong as a wholesale effort, authors can find many—sometimes subtle—ways to shape communication until it loses its integrity. Such communication is too persuasive, meaning the author has sacrificed its value as information in order to persuade.

While sifting through all the web messages for the ones that suit your purpose, you’ll have to pay attention to both what’s on the sites and in your own mind.

That’s because one of the things that gets in the way of identifying evidence of bias on websites is our own biases. Sometimes the things that look most correct to us are the ones that play to our own biases.

**Clues About Bias**

*Look for evidence of bias in your sources.*

Review the website or other source and look for evidence that the site exhibits more or less bias. The factors below provide some clues.

### Coverage

<table>
<thead>
<tr>
<th>Unbiased</th>
<th>Biased</th>
</tr>
</thead>
<tbody>
<tr>
<td>This source’s information is not drastically different from coverage of the topic elsewhere. Information and opinion about the topic don’t seem to come out of nowhere. It doesn’t seem as though information has been shaped to fit.</td>
<td>Compared to what you’ve found in other sources covering the same topic, this content seems to omit a lot of information about the topic, emphasize vastly different aspects of it, and/or contain stereotypes or overly simplified information. Everything seems to fit the site’s theme, even though you know there are various ways to look at the issue(s).</td>
</tr>
</tbody>
</table>

### Citing Sources

<table>
<thead>
<tr>
<th>Unbiased</th>
<th>Biased</th>
</tr>
</thead>
<tbody>
<tr>
<td>The source links to any earlier news or documents it refers to.</td>
<td>The source refers to earlier news or documents, but does not link to the news report or document itself.</td>
</tr>
</tbody>
</table>
### Evidence

<table>
<thead>
<tr>
<th>Unbiased</th>
<th>Biased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statements are supported by evidence and documentation.</td>
<td>There is little evidence and documentation presented, just assertions that seem intended to persuade by themselves.</td>
</tr>
</tbody>
</table>

### Vested Interest

<table>
<thead>
<tr>
<th>Unbiased</th>
<th>Biased</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is no overt evidence that the author will benefit from whichever way the topic is decided.</td>
<td>The author seems to have a “vested interest” in the topic. For instance, if the site asks for contributions, the author probably will benefit if contributions are made. Or, perhaps the author may get to continue his or her job if the topic that the website promotes gets decided in a particular way.</td>
</tr>
</tbody>
</table>

### Imperative Language

<table>
<thead>
<tr>
<th>Unbiased</th>
<th>Biased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statements are made without strong emphasis and without provocative twists. There aren’t many exclamation points.</td>
<td>There are many strongly worded assertions. There are a lot of exclamation points.</td>
</tr>
</tbody>
</table>

### Multiple Viewpoints

<table>
<thead>
<tr>
<th>Unbiased</th>
<th>Biased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both pro and con viewpoints are provided about controversial issues.</td>
<td>Only one version of <em>the truth</em> is presented about controversial issues.</td>
</tr>
</tbody>
</table>

### EXAMPLES: Bias

- The Cigarette Papers – Sources of information are documented for each chapter.
- White Poison: The Horrors of Milk – Claims are not supported by documentation.
**Making the Inference**

Consider the clues. Then decide the extent that the bias you detected on the source is acceptable for your purpose. It might help to grade the extent that this factor contributes to the site being suitable on a scale like this one:

- A – Very Acceptable
- B – Good, but could be better
- C – OK in a pinch
- D – Marginal
- F – Unacceptable

You’ll want to make a note of the source’s grade for bias so you can combine it later with the grades you give the other factors.

**Four: Recognition from Others**

Checking to see whether others have linked to a website or tagged or cited it lets you know who else on the web recognizes the value of the site’s content. Reader comments and ratings can also be informative about some sites you may be evaluating, such as blogs.

If your source is a book, the blurbs on the front or back cover give you information from authors, experts, or other well-known people who were willing to praise the book and/or author. The same kind of “mini-reviews” may be available on the publisher’s website. You can also look for reviews of the book or other source by using Google and Google Scholar.

Those links, tags, bookmarks, citations, and positive reader comments and ratings are evidence that other authors consider the site exemplary. Book reviews, of course, may be either positive or negative.

Exactly which individuals and organizations are doing the linking, tagging, citing, rating and commenting may also be important to you. There may be some company you’d rather your site not keep. Or, maybe the sites that link to the one you’re evaluating may help solidify your positive feelings about the site.

Don’t let an absence of links, tags, citations, ratings, and comments damn the site in your evaluation. Perhaps it’s just not well-known to other authors. The lack of them should just mean this factor can’t add any positive or negative weight to your eventual decision to use the site—it’s a neutral.
TIP: Peer Review as Recognition

The peer review process most articles undergo before publication in a scholarly journal lets you know they’re considered by other scholars to be worth publishing. You might also be interested to see to what extent other researchers have used an article after it was published. (That use is what necessitates their citation.) But keep in mind that there may not be any citations for very new popular magazines, blogs, or scholarly journal articles.

ACTIVITY: Influence You

Which of the following blurbs would influence you positively or negatively in your evaluation of the video game Fortnite?

1. My wife and I were concerned about letting our 8 and 11-year-old sons play the game so we consulted with this website [Common Sense Media] which essentially stated that Fortnite develops strategic thinking while your kids kill "monsters." When I actually watched my sons play the game, I was shocked to learn that the "monsters" were not monsters at all but human avatars of other players simultaneously playing the game. So, bottom line, if you are a parent considering allowing your children to play this game you need to understand that it involves killing humans, not monsters, and involves the use of military and automatic-type weapons. In my opinion as a former Army officer, hunter and gun owner, this game trivializes killing human beings, normalizes violent gun use, including AR 15 type weapons, and otherwise desensitizes children to violence.

   b., kevin. "User Reviews: This game is about killing other humans not monsters!" Common Sense Media, 26 February 2018, https://www.commonsensemedia.org/game-reviews/fortnite

2. Dude. The fornight game is way cool with total-package weaponry and characters. Anyone want to play teams?

   Pat Doe. Facebook post

3. Stiff arming its way through the crowded battle royale genre, Fortnite Battle Royale sets itself apart by trading the traditional, bland military simulation vibe with vivid colors and an outstanding, freeform building system that’s unlike anything else in competitive multiplayer games… unlike other battle royale games, like PlayerUnknown’s Battlegrounds, where an unlucky circle could leave getting out of the encroaching circle almost impossible, Fortnite’s map is at least small enough (relative to PUBG’s) that even if you have to run across the entire island to get to the safety of the randomly centered eye of the storm you run very little risk of being killed by the collapsing border.


For articles published in scholarly journals, use Google Scholar to enter the title of the article in quotes. In the results list, find the article you’re evaluating. (Many articles have similar titles.) Look for the number of citations in the lower left of the listing for your article. If you want more information on the authors who have done the citing, click on the citation number for a clickable list of articles or papers and
get the names of authors to look up at the end of the articles or with a search engine. (This is a good way
to discover more articles about your topic, too.)

Google Scholar shows how many articles have cited a given article:
https://scholar.google.com/scholar?q=Massillion%2BDiplomacy%2Bbefore%2Bthe%2BSec

Making the Inference

Consider the clues. Then decide the extent that the source’s recognition from others is acceptable for your
purpose. It might help to grade the extent that this factor contributes to the site being suitable on a scale
like this one:

A – Very Acceptable
B – Good, but could be better
C – OK in a pinch
D – Marginal
F – Unacceptable

You’ll want to make a note of the source’s grade for recognition so you can combine it later with the
grades you give the other factors.

Five: Currency of the Content

If the topic of your research is time-sensitive, the currency of information in the source will be important
to your decision about whether it fits your purpose. You’ll be asking yourself whether its information is
from the right time period to suit your purpose.

For some topics, that may mean you want the most up-to-date information. But for other topics, you may
need primary sources—those created at the same time as the event or condition you’re researching.
(Secondary sources are those that cite, comment on, or build on primary sources.)
**Clues About Currency**

*Check dates and other indicators that a source is current.*

Click around a website to gather clues as to how recent the information is. Look for statements about when the information was created:

- The dateline on a newspaper article represented there, for instance, and/or when it was posted on the site.
- Page creation or revision dates.
- A “What’s New” page that describes when content was updated.
- Press releases or any other dated materials.

Also test links on a website to see whether they work or are broken. If several are broken, perhaps no one is looking after the site anymore, which could indicate there is newer information that is relevant to the site that has never been posted there.

In a book, look at the back of the title page to see when it was published. Also take a look at the publication dates for sources listed in the bibliography. That will help you determine how current the information cited in the book is.

**Making the Inference**

Consider the clues. Then decide the extent that the source’s currency is acceptable for your purpose. It might help to grade the extent that this factor contributes to the source being suitable on a scale like this one:

- A – Very Acceptable
- B – Good, but could be better
- C – OK in a pinch
- D – Marginal
- F – Unacceptable

You’ll want to make a note of the resource’s grade for currency so you can combine it later with the grades you give the other factors.

**Six: Thoroughness**

*Consider how well a source covers your topic.*

Figuring out whether a website or other source is suitable for your purpose also means looking at how thoroughly it covers your topic.

You can evaluate thoroughness in relation to other sources on the same topic. Compare your source to how other sources cover the material, checking for missing topics or perspectives.
Clues About Thoroughness

Click around a site to get some idea of how thoroughly it covers the topic. If the source you are evaluating is a print resource, read the introduction and conclusion and also the table of contents to get a glimpse of what it covers. Look at the index to see what subject is covered with the most pages. Is it thorough enough to meet your information need?

Making the Inference

Consider the clues. Then decide the extent that the source’s thoroughness is acceptable for your purpose. It might help to grade the extent that this factor contributes to the source being suitable on a scale like this one:

A – Very Acceptable
B – Good, but could be better
C – OK in a pinch
D – Marginal
F – Unacceptable

You’ll want to make a note of the source’s grade for thoroughness so you can combine it later with the grades you give the other factors.

Combining the Factors

Once you’ve considered each factor used in evaluating a source, it’s important to take a look at the inferences you made about them. Now is the time to look at those grades all together—to average them if you’ve been assigning grades—and to make one more inference.

Taking the grade on each factor into account, can you infer that the source is relevant and credible enough for your purpose? If it isn’t, this is one source that can’t be helpful in your project. If it is relevant and credible enough, you can use information from that resource with confidence.

Making the Final Inference

Assume you’re writing a research paper and are considering using information from Site XYZ. You ran through the evaluation process as you looked over the site, and you made notes about the grades you assigned.

The grades you gave individual factors are:

- Neighborhood: A
- Author/publisher’s background: B
- Degree of bias: A
- Recognition from others: No Evidence
- Currency of the content: A
- Thoroughness: C
You average the grades (A=4, B=3, C=2, D=1, F=0), remembering not to include the factor on which you gave no grade. The score was 3.4, about a B, which is a “Good, but could be better” score on the scale we used in this tutorial. You decide to use information from this site in your project.

A – Very Acceptable
B – Good, but could be better
C – OK in a pinch
D – Marginal
F – Unacceptable
Chapter 5: Ethical Use and Citing of Sources

You likely know that research projects always need a reference or a works cited page (also called a bibliography). But have you ever wondered why?

There are some big picture reasons that don’t often get articulated that might help you get better at meeting the citation needs of research projects. It’s helpful to understand both the theory behind citing, as well as the mechanics of it, to really become a pro.

In everyday life, we often have conversations where we share new insights with each other. Sometimes these are insights we’ve developed on our own through the course of our own everyday experiences, thinking, and reflection. Sometimes these insights come after talking to other people and learning from additional perspectives. When we relate the new things we have learned to our family, friends, or co-workers, we may or may not fill them in on how these thoughts came to us.

Image source: https://xkcd.com/285/

Academic research leads us to the latter type of insight—the insight that comes from gaining perspectives and understandings from other people through what we read or watch. In academic work we must tell our readers who and what led us to our conclusions. Documenting our research is important because people rely on academic research to be authoritative, so it is essential for academic conversation to be as clear as possible. Documentation for clarity is a shared and respected practice, and it represents a core value of the academy called “academic integrity.” It is a way to distinguish academic conversations (or discourse) from everyday conversations (or discourse).

It is hard to talk about citation practices without considering some related concepts. Here are some definitions of those concepts that are often mentioned in assignments when citation is required.
Academic Integrity

Different universities have different definitions, but a general understanding follows in this definition:

Academic integrity is a commitment, even in the face of adversity, to five fundamental values: honesty, trust, fairness, respect, and responsibility. From these values flow principles of behavior that enable academic communities to translate ideals into action.

In other words, you must take full responsibility for your work, acknowledge your own efforts, and acknowledge the contributions of others’ efforts. Working/writing with integrity requires accurately representing what you contributed as well as acknowledging how others have influenced your work. When you are a student, an accurate representation of your knowledge is important because it will allow both you and your professors to know the extent to which you have developed as a scholar.

Academic Misconduct and Plagiarism

Maricopa County Community College District defines academic misconduct and plagiarism as the following:

A. Academic Misconduct - includes any conduct associated with the classroom, laboratory, or clinical learning process that is inconsistent with the published course competencies/objectives and/or academic standards for the course, program, department, or institution. Examples of academic misconduct include, but are not limited to: (a) cheating and plagiarism (including any assistance or collusion in such activities, or requests or offers to do so); (b) excessive absences; (c) use of abusive or profane language; and (d) disruptive behavior.

B. Cheating is any form of dishonesty in an academic exercise. It includes, but is not limited to, (a) use of any unauthorized assistance in taking quizzes, tests, examinations, or any other form of assessment whether or not the items are graded; (b) dependence upon the aid of sources beyond those authorized by the faculty member in writing papers, preparing reports, solving problems, or carrying out other assignments; (c) the acquisition, without permission, of tests or other academic material belonging to or administered by the college or a member of the college faculty or staff; and (d) fabrication of data, facts, or information.

C. Plagiarism is a form of cheating in which a student falsely represents another person’s work as his or her own – it includes, but is not limited to: (a) the use of paraphrase or direct quotation of the published or unpublished work of another person without full and clear acknowledgment; (b) unacknowledged use of materials prepared by another person or agency engaged in the selling of term papers or other academic materials; and (c) information gathered from the internet and not properly identified.

In addition Paradise Valley Community College English division includes the following as plagiarism:

- Recycled papers from previous classes.
- The use of teacher textbook editions whether they were unintentionally purchased or not.
Why Cite Sources?

Citing, or citation, is a practice of documenting specific influences on your academic work.

As a student citing is important because it shows your reader (or professor) that you have invested time in learning what has already been learned and thought about the topic before offering your own perspective. It is the practice of giving credit to the sources that inform your work.

In other words, you must cite all the sources you quote directly, paraphrase, or summarize as you

- Answer your research question.
- Convince your audience.
- Describe the situation around your research question and why the question is important.
- Report what others have said about your question.

Our definitions of academic integrity, academic misconduct and plagiarism, give us an important reason for citing the sources we use to accomplish academic research. Here are all the good reasons for citing.

To Avoid Plagiarism & Maintain Academic Integrity

Misrepresenting your academic achievements by not giving credit to others indicates a lack of academic integrity. This is not only looked down upon by the scholarly community, but it is also punished. When you are a student this could mean a failing grade or even expulsion from the university.

To Acknowledge the Work of Others

One major purpose of citations is to simply provide credit where it is due. When you provide accurate citations, you are acknowledging both the hard work that has gone into producing research and the person(s) who performed that research.

Think about the effort you put into your work (whether essays, reports, or even non-academic jobs): if someone else took credit for your ideas or words, would that seem fair, or would you expect to have your efforts recognized?

To Provide Credibility to Your Work & to Place Your Work in Context

Providing accurate citations puts your work and ideas into an academic context. They tell your reader that you’ve done your research and know what others have said about your topic. Not only do citations provide context for your work but they also lend credibility and authority to your claims.

For example, if you’re researching and writing about sustainability and construction, you should cite experts in sustainability, construction, and sustainable construction in order to demonstrate that you are well-versed in the most common ideas in the fields. Although you can make a claim about sustainable construction after doing research only in that particular field, your claim will carry more weight if you can demonstrate that your claim can be supported by the research of experts in closely related fields as well.
Citing sources about sustainability and construction as well as sustainable construction demonstrates the diversity of views and approaches to the topic. Further, proper citation also demonstrates the ways in which research is social: no one researches in a vacuum—we all rely on the work of others to help us during the research process.

**To Help Your Future Researching Self & Other Researchers Easily Locate Sources**

Having accurate citations will help you as a researcher and writer keep track of the sources and information you find so that you can easily find the source again. Accurate citations may take some effort to produce, but they will save you time in the long run. So, think of proper citation as a gift to your future researching self.

**Other Challenges in Citing Sources**

Besides the clarifications and difficulties around citing that we have already considered, there are additional challenges that might make knowing when and how to cite difficult for you.

**Not Really Understanding the Material You’re Using**

If you are working in a new field or subject area, you might have difficulty understanding the information from other scholars, thus making it difficult to know how to paraphrase or summarize that work properly.

**Running Out of Time**

When you are a student taking many classes simultaneously and facing many deadlines, it may be hard to devote the time needed to doing good scholarship and accurately representing the sources you have used. Research takes time. The sooner you can start and the more time you can devote to it, the better your work will be.

**Shifting Cultural Expectations of Citation**

Because of new technologies that make finding, using and sharing information easier, many of our cultural expectations around how to do that are changing as well. For example, blog posts often “reference” other articles or works by simply linking to them. It makes it easy for the reader to see where the author’s ideas have come from and to view the source very quickly. In these more informal writings, blog authors do not have a list of citations (bibliographic entries). The links do the work for them. This is a great strategy for online digital mediums, but this method fails over time when links break and there are no hints (like an author, title and date) to know how else to find the reference, which might have moved.

This example of a cultural change of expectations in the non-academic world might make it seem that there has been a change in academic scholarship as well, or might make people new to academic scholarship even less familiar with citation. But in fact the expectations around citing sources in academic research remain formal, and scrutiny of source use and citation is probably more thorough.
Chapter 6: Quoting, Paraphrasing, and Summarizing to Avoid Plagiarism

Learning how to effectively quote and paraphrase research can be difficult and it certainly takes practice. Your abilities to make good use of your research will improve as you work through the exercises in this section, not to mention as you take on other research writing experiences beyond college. Following are some basic strategies for summarizing, quoting and paraphrasing research in your writing and to explain how to avoid plagiarizing your research.

How to Summarize: An Overview

A summary is a brief explanation of a longer text. Some summaries, such as the ones that accompany annotated bibliographies, are very short, just a sentence or two. Others are much longer, though summaries are always much shorter than the text being summarized in the first place. Summaries of different lengths are useful in research writing because you often need to provide your readers with an explanation of the text you are discussing. This is especially true when you are going to quote or paraphrase from a source. Of course, the first step in writing a good summary is to do a thorough reading of the text you are going to summarize in the first place. Beyond that important start, there are a few basic guidelines you should follow when you write summary material:

- **Stay “neutral” in your summarizing.** Summaries provide “just the facts” and are not the place where you offer your opinions about the text you are summarizing. Save your opinions and evaluation of the evidence you are summarizing for other parts of your writing.
- **Don’t quote from what you are summarizing.** Summaries will be more useful to you and your colleagues if you write them in your own words.
- **Don’t cut and paste from database abstracts.** Many of the periodical indexes that are available as part of your library’s computer system include abstracts of articles. Do no cut this abstract material and then paste it into your own annotated bibliography. For one thing, this is plagiarism. Second, cutting and pasting from the abstract defeats one of the purposes of writing summaries and creating an annotated bibliography in the first place, which is to help you understand and explain your research.
How to Quote and Paraphrase: An Overview

Writers quote and paraphrase from research in order to support their points and to persuade their readers. A quote or a paraphrase from a piece of evidence in support of a point answers the reader’s question, “says who?”

This is especially true in academic writing since scholarly readers are most persuaded by effective research and evidence. For example, readers of an article about a new cancer medication published in a medical journal will be most interested in the scholar’s research and statistics that demonstrate the effectiveness of the treatment. Conversely, they will not be as persuaded by emotional stories from individual patients about how a new cancer medication improved the quality of their lives. While this appeal to emotion can be effective and is common in popular sources, these individual anecdotes do not carry the same sort of scholarly or scientific value as well-reasoned research and evidence.

Of course, your instructor is not expecting you to be an expert on the topic of your research paper. While you might conduct some primary research, it’s a good bet that you’ll be relying on secondary sources such as books, articles, and websites to inform and persuade your readers. You’ll present this research to your readers in the form of quotes and paraphrases.

A quote is a direct restatement of the exact words from the original source. The general rule of thumb is any time you use three or more words as they appeared in the original source, you should treat it as a quote. A paraphrase is a restatement of the information or point of the original source in your own words. While quotes and paraphrases are different and should be used in different ways in your research writing (as the examples in this section suggest), they do have a number of things in common. Both quotes and paraphrases should

- be introduced to the reader (use a signal phrase), particularly the first time you mention a source;
- include an explanation of the evidence which explains to the reader why you think the evidence is important, especially if it is not apparent from the context of the quote or paraphrase; and
- include a proper citation of the source.

The method you should follow to properly quote or paraphrase depends on the style guide you are following in your academic writing. The two most common style guides used in academic writing are the Modern Language Association (MLA), and the American Psychological Association (APA). Your instructor will probably assign one of these styles before you begin working on your project; however, if it is not specified, be sure to ask.

When to Quote, When to Paraphrase

The real art to research writing is using quotes and paraphrases from evidence effectively in order to support your point. There are certain rules, dictated by the rules of style you are following, such as the ones presented by the MLA or the ones presented by the APA.

The question of when to quote and when to paraphrase depends a great deal on the specific context of the writing and the effect you are trying to achieve. Learning the best times to quote and paraphrase takes practice and experience.
In general, it is best to use a quote when

- The exact words of your source are important for the point you are trying to make. This is especially true if you are quoting technical language, terms, or very specific word choices.
- You want to highlight your agreement with the author’s words. If you agree with the point the author of the evidence makes and you like their exact words, use them as a quote.
- You want to highlight your disagreement with the author’s words. In other words, you may sometimes want to use a direct quote to indicate exactly what it is you disagree about. This might be particularly true when you are considering the antithetical positions in your research writing projects.

In general, it is best to paraphrase when

- There is no good reason to use a quote to refer to your evidence. If the author’s exact words are not especially important to the point you are trying to make, you are usually better off paraphrasing the evidence.
- You are trying to explain a particular a piece of evidence in order to explain or interpret it in more detail. This might be particularly true in writing projects like critiques.
- You need to balance a direct quote in your writing. You need to be careful about directly quoting your research too much because it can sometimes make for awkward and difficult to read prose. So, one of the reasons to use a paraphrase instead of a quote is to create balance within your writing.

**Tips for Quoting and Paraphrasing**

- Introduce your quotes and paraphrases to your reader, especially on first reference.
- Explain the significance of the quote or paraphrase to your reader.
- Cite your quote or paraphrase properly according to the rules of style you are following in your essay.
- Quote when the exact words are important, when you want to highlight your your agreement or your disagreement.
- Paraphrase when the exact words aren’t important, when you want to explain the point of your evidence, or when you need to balance the direct quotes in your writing.

**Examples of Quotes and Paraphrases**

Here are four examples of properly quoting and paraphrasing evidence in your research essays. In each case, a weak example, or the way not to quote or paraphrase is provided.
Quoting in MLA Style

Here’s the first weak example, where the writer is trying to follow the rules of MLA style:

> There are many positive effects for advertising prescription drugs on television. “African-American physicians regard direct-to-consumer advertising of prescription medicines as one way to educate minority patients about needed treatment and healthcare options” (Wechsler 21).

This is a potentially good piece of information to support a research writer’s claim, but the researcher hasn’t done any of the necessary work to explain where this quote comes from or to explain why it is important for supporting her point. Rather, she has simply “dropped in” the quote, leaving the interpretation of its significance up to the reader.

Now consider this improved example of how this quote might be better introduced into the essay:

> In her “Pharmaceutical Executive” article, Jill Wechsler writes about one of the positive effects of advertising prescription drugs on television: “African-American physicians regard direct-to-consumer advertising of prescription medicines as one way to educate minority patients about needed treatment and healthcare options” (21).

In this revision, it’s much more clear what point the writer is trying to make with this evidence and where this evidence comes from.

When you use a direct quote in your research, you need to indicate the page number of that direct quote if a page number is available. While it can be a bit awkward to indicate within the text how the writer found this information if it’s from an online source, it’s important to do so on the first reference of a piece of evidence in your writing. On references to this piece of evidence after the first reference, you can use just the last name of the writer. For example:

> Wechsler also reports on the positive effects of advertising prescription drugs on television. She writes...

Paraphrasing in MLA Style

In this example, the writer is using MLA style to write a research essay for a Literature class. Here is a weak example of a paraphrase:

> While Gatsby is deeply in love with Daisy in The Great Gatsby, his love for her is indistinguishable from his love of his possessions (Callahan).

There are two problems with this paraphrase. First, if this is the first or only reference to this particular piece of evidence in the research essay, the writer should include more information about the source of this paraphrase in order to properly introduce it. Who is Callahan? Where is he published? Second, this paraphrase is actually not of the **entire** article but rather of a specific passage. The writer has neglected to note the page number within the parenthetical citation.
The improved revision of this paraphrase might look like this:

*John F. Callahan suggests in his article “F. Scott Fitzgerald’s Evolving American Dream” that while Gatsby is deeply in love with Daisy in *The Great Gatsby*, his love for her is indistinguishable from his love of his possessions (381).*

By incorporating the name of the author of the evidence the research writer is referring to here, the source of this paraphrase is now clear to the reader. Furthermore, because there is a page number at the end of this sentence, the reader understands that this passage is a paraphrase of a particular part of Callahan’s essay and not a summary of the entire essay. Again, if the research writer had introduced this source to his readers earlier, he could have started with a phrase like “Callahan suggests...” and then continued on with his paraphrase.

If the research writer were offering a brief summary of the entire essay following MLA style, he wouldn’t include a page number in parentheses. For example:

*John F. Callahan’s article “F. Scott Fitzgerald’s Evolving American Dream” examines Fitzgerald’s fascination with the elusiveness of the American Dream in the novels *The Great Gatsby*, *Tender is the Night*, and *The Last Tycoon.*

**Signal Phrases for Quotes and Paraphrases**

Signal phrases are used to alert readers to information being included in the writing to support your own ideas, to expand upon points already made, to provide examples, and to allow for alternate opinions/theories. But the signal phrase is more than just a “signal” that you will be bringing another’s voice, ideas or words into your writing. If the signal phrase is chosen with purpose and thought, it gives you control over how the information is perceived by the reader.

**Why Do We Use Them?**

George Mason University’s Writing Center explains there are three important reasons to use signal phrases:

1. **To mark boundaries:** Signal phrases mark boundaries between your words and the source’s words. By marking the boundaries, you also provide a smooth transition for the reader between your words and the source.
2. **To emphasize the source:** Signal phrases call attention to the author or source being used. In some cases, such as a literature review or the use of a well-known author, specific information about the source is important for the reader to know.
3. **To avoid plagiarism:** All source material must be cited, and signal phrases are one way to cite a source—however, additional citation formatting may be necessary depending on your citation style.

The following examples and tables from Antioch University Writing Center show how skillful writers choose appropriate signal phrases.
**MLA Citation**

Written by Antioch University Santa Barbara Writing Center

MLA uses an author–location (page #, paragraph #) system of citation.

You can cite in two ways:

With a signal phrase:

Stevens claims modern poetry “has to find what will suffice” (132).

In a parenthetical:

Modern poetry “has to find what will suffice” (Stevens 132).

**Basic Signal Phrase: Author’s Name + Verb (present/present perfect)**

Example:

Elizabeth Warren, an advocate for tax reform, asserts “...”

Elizabeth Warren, a former Harvard Law professor and US Senator, claims “...”

Optional information you can add to a signal phrase the first time you mention an author:

- **Title of the work:**
  - Elizabeth Warren, in her article “What’s Hurting the Middle Class?”, asserts “...”
- **Author’s credentials:** (helps establish author’s credibility/provides useful background):
  - Elizabeth Warren, an advocate for tax reform, argues “...”
  - Elizabeth Warren, a former Harvard Law professor and US Senator, claims “...”

**Signal Phrases: Verbs to Give Context**

Select verbs that will give readers more context for a quote or paraphrase:

<table>
<thead>
<tr>
<th>Verbs to introduce a fact/statement:</th>
<th>Verbs to introduce views the author disagrees with:</th>
</tr>
</thead>
<tbody>
<tr>
<td>states, writes, mentions, adds, points out, notes, comments, finds, observes, discusses, expresses, considers, explores, illustrates</td>
<td>refutes, denies, contradicts, critiques, rejects, calls into question, disputes, challenges, negates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Verbs to introduce a claim:</th>
<th>Verbs to introduce views the author agrees with:</th>
</tr>
</thead>
<tbody>
<tr>
<td>claims, argues, posits, reasons, asserts, proposes</td>
<td>endorses, confirms, agrees, supports, echoes, affirms</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Verbs to introduce what the author focuses on or excludes:</th>
<th>Verbs to introduce the author’s qualified agreement:</th>
</tr>
</thead>
<tbody>
<tr>
<td>emphasizes, stresses, highlights, focuses on, centers their argument around, overlooks, ignores, downplays, omits, excludes</td>
<td>acknowledges, admits, grants, concedes</td>
</tr>
</tbody>
</table>
Use Longer Phrases to Signal Your View of a Quote/Paraphrase:

Phrases to show that you agree with an author’s claims:

<table>
<thead>
<tr>
<th>Warren/ The article</th>
<th>offers/presents</th>
<th>a useful/timely/thorough/ important ... an effective counterargument/ interpretation... ample evidence of ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warren’s interpretation</td>
<td>analysis/argument</td>
<td>is incisive/cogent/persuasive/effective because ... is relevant to/has significant practical applications for ... effectively proves/integrates/challenges/explains...</td>
</tr>
</tbody>
</table>

Phrases to show that you disagree with an author’s claims:

<table>
<thead>
<tr>
<th>Warren/ The study/ The article</th>
<th>ignores/overlooks ... oversimplifies/downplays ... incorrectly assumes ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warren’s interpretation/analysis/argument</td>
<td>is problematic because/assumes that ... does not/fails to ... overlooks the deeper problem ... rests upon the questionable claim/assumption ...</td>
</tr>
</tbody>
</table>
Phrases for Concessions and Rebuttals:

<table>
<thead>
<tr>
<th>Concession</th>
<th>Refutation Phrases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admit that the other side has some merit</td>
<td>Point out the flaws in the other side, and return to your claim.</td>
</tr>
</tbody>
</table>

It is true that...  
Certainly...  
Admittedly...  
Of course...  
Obviously...  
It may seem that...  
Although X is right that...  
X is right to argue that...

But more careful analysis shows that...  
However, ... therefore,...  
On the other hand, ... so...  
Nevertheless, ... as a result...  
However, it is less certain that ... Therefore,...  
Nonetheless, ... Thus...  
However, the conclusion that ... is questionable because...  
But it does not necessary follow that. In fact,...

Purposeful and Accidental Plagiarism

Plagiarism can take several different forms. The most well-known, **purposeful plagiarism**, is handing in an essay written by someone else and representing it as your own, copying your essay word for word from a magazine or journal, or downloading an essay from the Internet.

A much more common and less understood phenomenon is **accidental or unintentional plagiarism**. Accidental plagiarism is the result of improperly paraphrasing, summarizing, quoting, or citing your evidence in your academic writing. Generally, writers accidentally plagiarize because they simply don’t know or they fail to follow the rules for giving credit to the ideas of others in their writing.

Both purposeful and accidental plagiarism are wrong, against the rules, and can result in harsh punishments. Ignoring or not knowing the rules of how to not plagiarize and properly cite evidence might be an *explanation*, but it is not an *excuse*.

Consider the examples below that use quotations and paraphrases from this brief passage:

*Those who denounce cybertulture today strangely resemble those who criticized rock music during the fifties and sixties. Rock started out as an Anglo-American phenomenon and has become an industry. Nonetheless, it was able to capture the hopes of young people around the world and provided enjoyment to those of us who...*
listened to or played rock. Sixties pop was the conscience of one or two generations that helped bring the war in Vietnam to a close. Obviously, neither rock nor pop has solved global poverty or hunger. But is this a reason to be “against” them? (ix).

Here is the citation in MLA style:

Here’s an obvious example of plagiarism:
Those who denounce cyberculture today strangely resemble those who criticized rock music during the fifties and sixties.

In this case, the writer has literally taken one of Lévy’s sentences and represented it as her own. That’s clearly against the rules.

Here’s another example of plagiarism, perhaps less obvious:
The same kind of people who criticize cyberculture are the same kind of people who criticized rock and roll music back in the fifties and sixties. But both cyberculture and rock music inspire and entertain young people.

While these aren’t Lévy’s exact words, they are certainly close enough to constitute a form of plagiarism. And again, even though you might think that this is a lesser form of plagiarism, it’s still plagiarism.

Both of these passages can easily be corrected to make them acceptable quotations or paraphrases.
In the introduction of his book Cyberculture, Pierre Lévy observes that “Those who denounce cyberculture today strangely resemble those who criticized rock music during the fifties and sixties” (ix).

Or
Author Pierre Lévy suggests that the same kind of people who criticize cyberculture are the same kind of people who criticized rock and roll music back in the fifties and sixties. But both cyberculture and rock music inspire and entertain young people (ix).

Note that changing these passages from examples of plagiarism to acceptable examples of a quotation and a paraphrase is extremely easy: properly cite your sources.

This leads to the golden rule of avoiding plagiarism:

| Always cite your sources. If you are unsure as to whether you should or should not cite a particular claim or reference, you should probably cite your source. |

Often, students are unclear as to whether or not they need to cite a piece of evidence because they believe it to be “common knowledge” or because they are not sure about the source of information. When in doubt about whether or not to cite evidence in order to give credit to a source ("common knowledge" or not), you should cite the evidence.
Plagiarism and the Internet

Sometimes, the ease of finding and retrieving information on the World Wide Web makes readers think that this information does not need to be cited. After all, it isn’t a traditional source like a book or a journal; it is available for free. All a research writer needs to do with a web site is cut and paste whatever he needs into his essay, right? Wrong!

You need to cite the evidence you find from the Internet or the World Wide Web the same way you cite evidence from other sources. To not do this is plagiarism, or, more bluntly, cheating. Just because the information is freely available on the Internet does not mean you can use this information in your academic writing without properly citing it, much in the same way that the information from library journals and books freely available to you needs to be cited in order to give credit where credit is due.

It is also not acceptable to simply download graphics from the World Wide Web. Many images found on the Internet are protected by copyright laws. Quite literally, taking images from the Web (particularly from commercial sources) is an offense that could lead to legal action. There are places where you can find graphics and clip art that are publicly available, but be sure that the Web site where you find the graphics makes this explicit before you take graphics.

In short, you can use evidence from the Web as long as you don’t plagiarize and as long as you properly cite it; don’t take graphics from the Web unless you know the images are in the public domain. For example, all images in this book are licensed and used with permission and are attributed as required.

MLA 8th Edition: Format Guidelines

Basic Information - Setting Up the Paper

Always cite your sources. If you are unsure as to whether you should or should not cite a particular claim or reference, you should probably cite your source.

- Use white 8.5 x 11 inch paper.
- Double-space everything.
- Unless instructor has a preference, use 12-point Times New Roman font.
- Leave only ONE space after punctuation.
- Set all margins to 1 inch.
- Include a header with last name and page number. The header should be in the upper right-hand corner 1/2 inch from the top.

Works Cited Page

- Center the title Works Cited – no bold, underline or italics is necessary.
- Alphabetize the Works Cited page by using the first term of the entry.
- Use hanging indents for each entry. The second, third, fourth (or more) lines should be indented 1/2 inch from the left margin.
The Works Cited page is made up of core elements organized in a specific order. Include the following elements in the order they are given followed by the punctuation mark shown. (If the source does not include one or more of the elements, go to the next one.)

1. **Author.** (Last name, First name.) For more than one author list the first author’s name as Last name, First name, and the other authors as First name(s) Last Name(s).

2. **Title of source.** (Articles, chapters, web pages etc. are in quotes and books are in italics.)

3. **Title of container,** (Source documented is part of a larger whole. For example, a journal article is the source and the journal/magazine is the container. The title of the container should be italicized. Examples of containers are: anthologies, journals, magazines, encyclopedias, title of a TV series, a Web site.)

4. **Other contributors,** (Aside from the author(s), other people may be credited. For example, an editor, translator, illustrator etc. may have played in a key role and should be acknowledged.)

5. **Version,** (May also be referred to as the edition of a work. Use the abbreviation ed.)

7. **Number,** (The source may be part of a numbered sequence. If provided, include the volume and the issue numbers. If a volume number is provided, it should be set up as vol. 2 [lower case “v” if following a comma] or Vol. 2 [upper case “V” if it is after a period.]. If the source has an issue number, it should come after the volume # and is set up as no. #.)

8. **Publisher,** (Organization primarily responsible for producing a work.)

9. **Publication date,** (Give whatever date the source provides and site it in its entirety. If the source includes the day, month, & year, set it up as 28 Oct. 2016.)

10. **Location,** (For books, include page number as p.# or numbers as pp. #. For web sources, it is preferred to include the DOI [digital object identifier] if it is provided. If the DOI is not provided include the URL (copy the URL from the search box and do not include the https://.) The URL is optional; include it if required by your instructor.

11. The date of access is optional and is the last part of the entry. Set it up as Accessed Day Month Year.

### Examples of Entries for the Works Cited Page

#### Template for Database Entries

Author. “Title of Article.” *Title of Scholarly Journal*, vol. #, issue #, year of publication, pages. *Name of Database*, doi # or URL. Accessed Day Month Year (optional).

#### Samples for Commonly Used Library Databases

*Academic OneFile* (The items included may vary and depend on the source. The DOI is preferred, but if it not provided, use the URL starting with www.)

**Academic Search Premier** (The items included may vary and depend on the source. The DOI is preferred, but if it not provided, use the URL starting with www.)


**CQ Researcher** (The items included may vary and depend on the source. The DOI is preferred, but if it not provided, use the URL starting with www.)


**Issues and Controversies** (The items included may vary and depend on the source. The DOI is preferred, but if it not provided, use the URL starting with www.)


**JSTOR** (The items included may vary and depend on the source. The DOI is preferred, but if it not provided, use the URL starting with www.)


**ProQuest** (National Newspaper Core). (The items included may vary and depend on the source. The DOI is preferred, but if it not provided, use the URL starting with www.)


**Templates for Website Articles**

Author. “Title of the Web page.” *Sponsoring Organization*, date of publication, URL.

**A Website Article with a Named Author**

A Website Article with No Author


An Entire Website

Name of Site. Version number, Name of institution/organization affiliated with the site (sponsor or publisher), date of resource creation (if available), URL, DOI or permalink.


Template for Books

Last name, First name. Title of Book. Publisher, Publication Date.

A Book with a Single Author


A Book with More Than One Author (2-3 names are listed)


Please note: The example above is a book, but listing multiple authors this way applies to any source.

A Source with Three or More Authors

List the first author followed by the phrase et al. (Latin for “and others”)


Please note: The example above is for a database article, but listing multiple authors this way applies to any source.

Template for a Work in an Anthology

Last name, First name. “Title of the Work.” Title of the Collection, edition, edited by Editor’s Name(s), Publisher, Year, Page range.

A Work in an Anthology or Collection

Template for an Article in a Magazine

Last Name, First name. “Title of Article.” Title of Magazine, date, page range.

Article for a Monthly Magazine Article


(If the magazine article is from a weekly magazine, like Time, provide the complete date using the order of day, month, year).

Template for an Article in a Newspaper

A newspaper article is cited the same way as a magazine article except page numbers are different for a newspaper. Also, if there are multiple editions of the newspaper, indicate the ed. after the date.

A Newspaper Article


In-Text (Parenthetical) Citations

The in-text citation is a brief reference that directs the reader to a source listed on the Works Cited page. The in-text citation should be in parentheses and placed after the source material. The period goes after the parentheses, not before.

An in-text or parenthetical citation can be created by

1. Using a signal phrase that names the author or title of the source and includes the page # in the parentheses.

   Example: Dr. Linda Elder and Dr. Richard Paul explain that “When we consider the feelings of others before we do something we are being fair” (15).

2. Placing the author (or title if no author) and page # (if provided) in parentheses immediately after the source material.

   Example: In order to engage in high order thinking, one must learn to identify problems in their own thinking and improve it by applying intellectual standards (Elder and Paul 20).

   Example: (No author(s) named, so use the title in parentheses.) Students who engage in the development of critical thinking skills will benefit in ways that go far beyond the classroom (“Fostering Critical Thinking”).
Practice Exercise: Quote or Paraphrase ABCs

Incorporating Sources Using MLA

**Plagiarism:** Using another writer’s words and ideas in an essay without giving proper credit to that individual. **This is a violation of the student code of conduct.**

**Paraphrase:** Taking a section of information from a source and rewording it to keep the essence of the text and ideas. This still requires a citation.

**Parenthetical citation:** Placing the source information in parentheses after borrowed material. Usually you include the author and the page number, if available. Example: (Polliard 7)
If no author is given, use an abbreviated version of the title of the article. Example: (“Multiple Personalities in Hamlet” 7)

**Signal Phrase:** An introductory phrase before a quote or paraphrase that indicates the source of the information by providing the author or the title of the article. Example: According to Professor Polliard, plagiarism can potentially result in a failing grade for the course.

ABC’s for Incorporating Sources

**Always cite your information**
- Use a signal phrase to indicate where source material begins.
- Use a parenthetical citation after information borrowed from a source whether you paraphrase it or quote it.
- Use quotation marks around material that is taken word for word from the source.
- Include a complete Works Cited page at the end of the essay.

**Balance the source material with paraphrases and quotations**
- Do not use an exact quotation for every piece of documented information.
- Use quotes only when the information is highly technical or can’t be stated equally well in your own words.
- Consider what the audience would find interesting in terms of quotations.

**Connect the source material to the topic sentence with explanation between sources.**
- Don’t plan on using quote after quote without connective commentary.
- Connective commentary means that you interpret the significance of the source material in relation to the topic sentence or thesis statement. Why is this information relevant? Use your own words and insight to illustrate the usefulness of the source information.
- An essay should have more of your own words than it has source information; source information is meant to add “backing” or credibility to your ideas.
- Don’t be a name-dropper! Provide context to explain the background qualifications/ credentials of the person credited for the original information whenever possible.
Practice Exercises

**Exercise 1**

Given the excerpt from a recent *Time* magazine article, evaluate the attempted paraphrases for plagiarism and citation accuracy. Use a highlighter to note words and phrases lifted exactly from the passage.

Sample excerpt:

“Simply being an introvert can also feel taxing—especially in America, land of the loud and home of the talkative. From classrooms built around group learning to open-plan offices that encourage endless meetings, it sometimes seems that the quality of your work has less value than the volume of your voice” (Walsh 42).

1. Simply being an introvert can also feel taxing—especially in America, land of the loud and home of the talkative (Walsh 42).
2. Being an introvert in America is challenging because we are the land of the loud and home of the loquacious. Today’s classrooms are adapted around group learning environments, and office settings have open-plans that encourage endless meetings (Walsh 42).
3. In an article published recently in *Time* magazine, the author discusses how introverted people struggle to be successful in classrooms and business settings because these work environments are planned to enable students and employees to work in groups and participate in long business meetings. Often the amount and quality of a person’s work goes unnoticed compared to the person who speaks the loudest and produces the least.
4. Sometimes introverted people struggle to be successful in classrooms and business settings because these work environments are planned to enable students and employees to work in groups and participate in long business meetings. Often the amount and quality of a person’s work goes unnoticed compared to the person who speaks the loudest and produces the least (Walsh 42).

**Exercise 2**

Pretend that you have been assigned an essay to argue the virtues of an introverted personality. Consider and analyze the information below to include as possible support. To create a sense of balance in source material, evaluate whether the following excerpts would be more effective as quoted or paraphrased material. Check the box for either quote or paraphrase. Be prepared to share and explain your answer.

Hints:
- Can the information be paraphrased without losing any of the value of the style or poignancy of the information?
- Does the original wording of the information offer any special insight?
- Does the information have ideas that would speak to the audience in a way that would make them understand the material better than a paraphrase?
1. “Shyness is a form of anxiety characterized by inhibited behaviors. It also implies a fear of social judgment that can be crippling” (Walsh 40).

Paraphrase [ ] Quote [ ]

2. “In schools, it’s the bolder kids who get attention from the teachers, while quiet children can too easily languish in the back of the classroom” (Walsh 42).

Paraphrase [ ] Quote [ ]

3. “Introverts may be able to fit all their friends in a phone booth, but those relationships tend to be deep and rewarding” (Walsh 42).

Paraphrase [ ] Quote [ ]

4. “And simply by virtue of their ability to sit still and focus, introverts find it easier to spend long periods in solitary work, which turns out to be the best way to come up with a fresh idea or master a skill” (Walsh 42).

Paraphrase [ ] Quote [ ]

5. “There’s even a case to be made that introverted CEOs are the business leaders of the future” (Walsh 44-45).

Paraphrase [ ] Quote [ ]

Exercise 3

The passage below is taken from the same Time article written by Bryan Walsh. Explain why the passage is a good example of balancing and connecting his ideas with “backing.”

The very fact that introverts are more sensitive to their environment often means they’re fully aware that they appear out of step with the expectations of others, and they can easily internalize that criticism. Just about every adult introvert can remember being scolded, even if gently, for being too quiet as a kid. Anytime a teacher grades on participation, introverted kids will be at a disadvantage. There’s nothing wrong with parents’ nudging their shy children into the world, but there is something wrong if it’s more than a nudge. “You don’t want to break the kid by overwhelming their coping capacity,” says Jay Belsky, a psychologist at the University of California at Davis. “The key is sensitive encouragement.”

1. How much of the paragraph is the author’s own words and ideas?

2. What does the quote at the end add to the paragraph?
As you develop a working thesis for your research project and begin to collect different pieces of evidence, you will soon find yourself needing some sort of system for keeping track of everything. The annotated bibliography is a list of sources on a particular topic that includes a brief summary of what each source is about. This writing exercise isn’t an “essay”; rather it is an ongoing writing project that you will be building as you discover new pieces of evidence for your research project.

Why Write Annotated Bibliographies

An annotated bibliography is an excellent way to keep track of the research you gather for your project. Make no mistake about it—it is extremely important that you keep track of all of your evidence for your research project, and that you keep track of it from the beginning of the process of research writing.

There is nothing more frustrating than finding an excellent article or book chapter you are excited about incorporating into your research project, only to realize you have forgotten where you found the article or book chapter in the first place. This is extremely frustrating, and it is easily avoided by doing something like writing an annotated bibliography.

You could use other methods for keeping track of your research. Some instructors require note cards. For example, you use note cards and write down the source information as a proper citation, then write down the information about the source that is important. If the material you know you want to use from a certain source is short enough, you might even write a direct quote, which is where you write down word
Annotated Bibliography

for word what the source says exactly as it is written. At other times, you can write a paraphrase, which is where you write down what the source means using your own words.

While note cards and other methods have their advantages, annotated bibliographies are an extremely useful tool for keeping track of your research. An annotated bibliography

- Centralizes your research into one document that you can keep track of both as a print-out of a word-processed file and as a file you save electronically.
- Allows you to copy and paste citation information into the works cited part of your research project.

An annotated bibliography also gives you the space to start writing and thinking a bit about how some of your research might fit into your project. Consider these two sample entries from an annotated bibliography from a research project on pharmaceutical advertising:


Siegel, who is a doctor himself, writes about how drug advertising has undermined the communication between doctors and patients. He says that drug ads have driven up the costs of prescription drugs, particularly big selling drugs like those for cholesterol.


This article is about a study that said that African-American doctors saw advertising of prescription drugs as a way of educating their patients. The ads are useful because they talk about diseases that affect African-Americans.

Even from the limited amount of information available in these entries, it is clear that a relationship between these articles exists. Both are similar articles about how the doctor/patient relationship is affected by drug advertising. But both are also different. The first article is from the newspaper *The Nation*, which is in many ways similar to an academic journal and which is also known for its liberal views. The second article is from a trade journal (also similar to academic journals in many ways) that obviously is an advocate for the pharmaceutical industry.

In other words, in the process of compiling an annotated bibliography, you are doing more than keeping track of your research. You are starting to make some comparisons and beginning to see some relationships between your evidence, a process that will become increasingly important as you gather more research and work your way through the different exercises that lead to the research project.

**How to Write Annotated Bibliographies**

Annotated bibliographies always have two distinct parts, and depending on the instructor’s specific requirements, and optional third part.

The first part of an annotated bibliography entry is the citation. Just like the citation used for a Works Cited page, this citation lists information like the name of the writer, where the evidence appeared, the
The first two sentences of this annotation are an example of this sort of very brief, “just the facts” sort of summary. In the brief summaries in an annotated bibliography, stay away from making evaluations about the source—“I didn’t like this article very much” or “I though this article was great.” The most important goal of your summary is to help you, colleagues, and other potential readers get an idea about the subject of the particular piece of evidence.

Summaries can be challenging to write, especially when you are trying to write them about longer and more complicated sources of research. Keep these guidelines in mind as you write your own summaries.

- **Keep your summary short.** Good summaries for annotated bibliographies are not complete summaries; rather, they provide the highlights of the evidence in as brief and concise a manner as possible.
- **Don’t quote from what you are summarizing.** Summaries will be more useful to you and your colleagues if you write them in your own words. Instead of quoting directly what you think is the point of the piece of evidence, try to paraphrase it. (For more on paraphrasing your evidence, see Chapter 3, “Quoting, Paraphrasing, and Avoiding Plagiarism”).
- **Don’t cut and paste from database abstracts.** Many of the periodical indexes that are available as part of your library’s computer system include abstracts of articles. Do not cut this abstract material and then paste it into your own annotated bibliography. For one thing, this is plagiarism. Second, cutting and pasting from the abstract defeats one of the purposes of writing summaries and creating an annotated bibliography in the first place, which is to help you understand and explain your research.

Different writers will inevitably write slightly different summaries of the same evidence. Some differences between different writers’ summaries of the same piece of evidence result from different interpretations of what is important in the research; there is nothing wrong with that.

However, two summaries from different writers should both provide a similar summary. In other words, it is not acceptable when the difference of interpretation is the result of a lack of understanding of the evidence.

Sometimes, an annotated bibliography can contain a **third part:** an evaluation of the source. This section answers questions such as, “What makes this source credible?” and “Why will this source be useful for my research purpose?”

**Sample Assignment: Writing an Annotated Bibliography**

*As you conduct your research for your research writing project, compile an annotated bibliography with 15-20 entries. Each entry in your annotated bibliography should contain a citation, followed by a brief*
summary of the cited material. You will be completing the project in phases and a complete and revised version of it will be due when you have completed your research.

You should think of your annotated bibliography as having roughly twice as many sources as the number of sources you will need to include for the research project, but your instructor might have a different requirement regarding the number of sources required.

Also, you should work on this assignment in parts. Going to the library and trying to complete this assignment in one sitting could turn this into a dreadful writing experience. However, if you complete it in stages, you will have a much better understanding of how your resources relate to each other.

Last, but not least, you will need to discuss with your instructor the sorts of materials you need to include in your research and your annotated bibliography. You may be required to include a balance of research from scholarly and non-scholarly sources, and from “traditional” print resources (books, magazines, journals, newspapers, and so forth) and the library databases and the World Wide Web.

Questions to Ask While Writing and Researching

- Would you classify the material as a primary or a secondary source? Does the research seem to be difficult to categorize this way? (For more information on primary and secondary sources, see Chapter 1, “Thinking Critically About Research” and the section “Primary versus Secondary Research”).
- Is the research from a scholarly or a non-scholarly publication? Does the research seem difficult to categorize this way?
- Is the research from a web page, a podcast? Remember: while Internet research is not necessarily “bad” research, you do need to be more careful in evaluating the credibility of Internet-based sources. (For more information on evaluating Internet research, see Chapter 1, “Thinking Critically About Research.”)
- Do you know who wrote the material you are including in your annotated bibliography? What qualifications does your source say the writer has?
- Why do you think the writer wrote it? Do they have a self-interest or a political viewpoint that might make them overly biased?
- Besides the differences between scholarly, non-scholarly, and Internet sources, what else do you know about where your research was published? Is it an academic book? An article in a respected journal? An article in a news magazine or newspaper?
- When was it published? Given your research topic, how important do you think the date of publication is?
- Are you keeping your summaries brief and to the point, focusing on the point your research source is trying to make?
- If it is part of the assignment, are you including a sentence or two about how you see this piece of research fitting into your overall research project?

Revision and Review

Because of its ongoing nature, revising an annotated bibliography is a bit different from the typical revision process. Take opportunities as you compile your annotated bibliography to show your work in progress to your classmates, your instructor, and other readers you trust. If you are working
collaboratively on your research projects, you will certainly want to share your annotated bibliography with classmates who are working on a similar topic. Working together like this can be a very useful way to get more ideas about where your research is going.

It is best to approach the annotated bibliography in smaller steps—five or six entries at a time. If that is how you’re approaching this project, then you will always be in a process of revision and review with your classmates and your instructor. You and your readers (your instructor and your classmates) should think about these questions as you revise, review, and add entries:

- Are the summaries you are including brief and to the point? Do your readers understand what the cited articles are about?
- Are you following a particular style guide consistently?
- If you are including a sentence or two about each of your resources, how do these sentences fit with your working thesis? Are they clarifying parts of your working thesis that were previously unclear? Are they suggesting changes to the approach you took when you began the research process?
- Based on the research you have so far, what other types of research do you think you need to find?

**How Many Sources Do I Need?**

Inevitably, students in research writing classes always ask how many sources they need to include in their research projects. In one sense, “how many sources do I need?” is a utilitarian question, one usually attached to a student’s exploration of what it will take to get a particular grade. Considered more abstractly, this question is also an effort to explore the scope of a research project.

Like a certain page or word count requirement, the question “how many sources do I need?” is an effort to get a handle on the scope of the research project assignment. In that sense, asking about the number of sources is probably a good idea, a little like asking how much something weighs before you attempt to pick it up.

Ultimately, there is no right or wrong answer to this question. Longer research projects tend to have evidence from more different sources than shorter projects, but there is no cut-and-dry formula where “X” number of pages will equal “X” number of sources.

However, an annotated bibliography often contains significantly more entries than you intend or expect to include in your research project. For example, if you think you will need or if your instructor requires you to have research from about 7-10 different sources, you should probably have about 15-20 different entries on your annotated bibliography.

The reasons you need to find twice as many sources as you are likely to use is that you want to find and use the best research you can reasonably find, not the first pieces of research you can find. Usually, researchers have to look at a lot more information than they would ever include in a research writing project to begin making judgements about their research. And by far the worst thing you can do in your research is to stop right after you have found the number of sources required by the instructor for your project.

Personal computers, software, and the Internet tools can make putting together an annotated bibliography more useful and a lot easier. If you use software to create your annotated bibliography, you can
dramatically simplify the process of creating a “works cited” or “references” page, which is a list of the sources you quote in your research project. All you will have to do is copy and paste the citation from the annotated bibliography into your research project.

This same sort of copy and paste function also comes in handy when doing research on the Web. For example, you can usually copy and paste the citation information from your library’s online database for pieces of evidence you are interested in reading. In most cases, you should be able to copy and paste information you find in your library’s online database into a document. Many library databases—both for books and for periodicals—also have a feature that will allow you to email yourself results from a search.

A Reminder about Plagiarism

Keep two things in mind about using the Internet for your annotated bibliographies:

- You will have to reformat whatever information you get from the Internet or your library’s databases in order to meet the most recent version of MLA or APA style guides.
- Citation Machines are helpful for generating proper citations. Examples are Easy Bib, KnightCite, CiteMaker, and others. However, be aware that these tools are not always updated to the most recent style manuals. It is your responsibility to check these citations for correct order of information and required punctuation. Some sources include a full citation at the end of an article, but again, make sure that these citations reflect the most current version of the style guide required by your instructor.

Don’t use the copy and paste feature to plagiarize. Simply copying things like abstracts defeats one of the important purposes for writing an annotated bibliography in the first place, and it’s cheating.

Remember

However you decide to keep track of your research as you progress through your project—an annotated bibliography, note cards, or another method—the important thing is that you need to keep track of your research as you progress through your project.
Copyright Basics: What Is Copyright?

Copyright gives creators an incentive to produce and share new works by granting them exclusive rights to their work for a limited time.

Copyright is the law. While digital technology has made some aspects of copyright more complex, knowing the basics can help you to use material legally and to protect your own creative works.

You create copyrighted works regularly. When you write something, record a song or video, or take a photograph you have created a work that is protected by copyright. It is important to know how to manage your rights as a creator.

Every day you work with copyrighted materials created by other people. Whenever you read a book, download a song, stream a video or play a video game, you are potentially dealing with copyrighted materials. It is important to understand what is and is not covered by copyright law.

U.S. Copyright Law has its origin in the U.S. Constitution:

“The Congress shall have the power…to promote the Progress of Science and useful Arts, by securing for limited Times to Authors and Inventors the exclusive Right to their respective Writings and Discoveries.
– U.S. Constitution Article 1, Section 8
The U.S. Congress has the power to create laws that govern copyright.

The purpose of copyright is to encourage the creation and sharing of creative works. Copyright gives creators an incentive to produce and share new works by granting them exclusive rights to their work for a limited time. This provides an opportunity for a creator to benefit from his or her work.

Congress determines the limits of this monopoly, including the length of time that copyright coverage lasts. These limits can (and have) changed over time.

**What Copyright Covers**

*Copyright covers original work that is fixed in a tangible medium of expression.*

The kinds of works covered by copyright are listed in Section 102 of the Copyright Act. In order for a work to be covered by copyright, it must be an original work of authorship fixed in a tangible medium of expression.

There are several types of works that can be protected:

- literary works
- musical works, including any accompanying words
- dramatic works, including any accompanying music
- pantomimes and choreography
- pictorial, graphic, and sculptural works
- motion pictures and other audiovisual works
- sound recordings
- architectural works

In addition to these, new formats such as email, software, video games, and digital works including web pages and online images have all been determined to be covered by copyright protection.

**DEFINITION: Original Work of Authorship**

In copyright law, originality means that a work should have at least a minimum amount of creativity. For example, an alphabetized list of names and phone numbers would not receive copyright protection because it required no creativity to produce.

**DEFINITION: Tangible Medium of Expression**

For a work to be “fixed in a tangible medium,” it must exist in some perceptible format for more than a transitory duration. For example, a work that is fixed in a tangible medium could be written on paper, saved to a computer hard drive, or recorded on film. An improvised jazz performance that is not recorded would not have copyright protection, because the creative expression of the musician has not been saved in any tangible format.
What Isn’t Covered by Copyright

Not all works are covered by copyright. Those not covered include the following types of works:

Works already in the public domain
- *Moby Dick*
- Shakespeare’s plays
- Beethoven’s works

Works not fixed in a tangible medium
- A song in your head, but not recorded or written down

Ideas
- Boy meets girl, they fall in love and live happily ever after
- Hero protagonist saves the world with the help of wacky sidekick

Facts
- 1+1=2
- George IV died in 1830
- Copenhagen is the capital of Denmark

Works of the U.S. Government produced by government employees
- Federal government reports
- Acts/Bills of Congress
- [www.whitehouse.gov](http://www.whitehouse.gov)

Rights Granted by Copyright

So, now that you know what kinds of works are covered by copyright, what exactly are the rights granted to a copyright holder?

Five exclusive rights are granted to the creator of a copyrighted work. We call these the Author’s Bundle of Rights. This means the copyright holder is the only person who has the right to do these things and has the authority to grant permission for others to do these things.

If you are not the copyright holder and want to do any of the activities on the right, you may need to get permission to do so from the holder of the copyright.
# AUTHOR’S BUNDLE OF RIGHTS

## To Reproduce
- Making physical and digital copies

## To Prepare Derivative Works
- Creating foreign language translations, movie adaptation of a book, etc.

## To Distribute
- Sharing over Peer-to-Peer networks or posting online, as well as distributing physical copies

## To Display Publicly
- Displaying in a gallery, putting posters on a noticeboard, etc.
- To Perform Publicly (for literary, musical, dramatic and other audiovisual works)

## Performing a play, showing a movie, broadcasting on TV, reading aloud from a book, etc.
- To Perform Publicly (for sound recordings, to perform by means of digital audio transmission)
- Playing recorded music in clubs, restaurants, stores, on the radio, etc.

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## When Copyright Applies

Under current U.S. law, copyright applies as soon as a work is fixed in a tangible medium of expression. This means that when you save a file, take a photograph, record a song, or paint a picture your work has copyright protection.

As the creator, provided that the work is not a work made for hire, you are the owner of the copyright on your work. You do not have to register the work with the U.S. Copyright Office, publish it, or put a copyright notice on it.

If you wish to give away, sell or license any or all of the copyright on your work, you have the right to do so.

If you give away or sell your exclusive copyright to someone else, you no longer have the rights mentioned above and need to treat the work the same as any other copyrighted work created by someone else.

## Respecting Copyright

While working with other people’s copyrighted works, remember that their works are under copyright protection from the moment of creation.
Additionally, U.S. Copyright Law applies to works found on the Internet. Many of the works you find online are protected by copyright, even if there is no copyright notice. The availability of and the ability to access copyrighted materials on the Internet does not mean that those works are in the public domain, and thus free to use, reuse and distribute in any manner you wish. It is important to respect copyright, whether the works are in a physical or digital format.

**Risks of Infringing Copyright**

If you infringe upon one or more of the exclusive rights, the copyright owner can bring a claim against you for copyright infringement. There are a few different penalties that are possible if you are accused of copyright infringement:

- Under specific circumstances, U.S. copyright law allows criminal prosecution in cases of willful infringement.
- If the infringing work is online, such as a video posted to YouTube, the copyright owner can send a takedown notice. The material will be taken down and you will be notified of the accusation of infringement. If you believe that your use of the material is legal, you can respond with your explanation of why. Some Internet Service Providers will cut off your access if you receive too many takedown notices.
- The copyright owner can sue you. They could ask for an injunction to stop your use of their work. They can also ask for either actual damages or statutory damages. Actual damages are the actual amount of money the copyright owner lost due to your activity plus any profit you made from using the work. These can be hard to determine, so the law also allows for statutory damages. These are a set range, from $750 to $30,000 per infringed work, that the judge or jury awards to the rights holder if you are found guilty. These damages can increase to $150,000 per infringed work if your use is determined to be “willful” infringement.
- Some rights holders will offer the option of settling out of court for a few thousand dollars. This is cheaper than the cost of a trial for the rights holder and you.

The accusation of infringement is not the same as a conviction. You always have the right to defend your use.

**Exceptions to Copyright**

U.S. Copyright Law includes exceptions that limit the rights of the copyright holder. These exceptions allow for certain uses of copyrighted material without seeking permission. Congress created these exceptions in order to balance the rights of creators and users and to enable some socially beneficial uses of copyrighted works.

Some of these exceptions are explained in the following categories:
Fair Use

Fair Use (Sec. 107) allows for various uses of copyrighted works. This is the most flexible of the exceptions in the copyright law and can apply in a wide variety of situations.

First Sale Doctrine

The first sale doctrine (Sec. 109) allows you to distribute a legally acquired physical copy of a copyrighted work. This allows libraries to lend books and individuals to lend or sell used books, movies or CDs.

Classroom Display or Performance

Under Section 110(1) it is okay to display or perform copyrighted works in a face- to-face classroom setting at a non-profit educational institution. This allows a teacher to show a video or students to create and display multimedia projects in class. Section 110(2) allows for the display or performance of copyrighted works for distance learning (e.g. on a course management system), but you must fulfill many specific requirements in order to qualify for this exception.

What Is Fair Use?

Fair Use is an exception to U.S. copyright law that allows use of copyrighted work under certain conditions.

Are you incorporating any materials in your research final product that were created by someone else, such as images or text from other works? These materials could be protected by copyright. For example, content you find online, text, books, movies, songs, email, images, and videos are most likely copyrighted. Fortunately, U.S. copyright law includes an exception that allows you to use copyrighted work in your assignments for class.

However, if you would like to share your research product outside of the classroom (such as on a webpage or blog or in your portfolio), you will need permission from the copyright owner(s) unless your use is covered under another statutory exception. Fair use is one such exception, and it can apply to a wide variety of uses.

NOTE: Fair Use and Educational Use

Fair Use plays an important role in education. Although educational use receives several protections in copyright law, not all educational use is automatically fair use. It’s important to know that there are limits to how you can use others’ creative works even as a student or teacher in the classroom.

It is important to learn about fair use and strategies to help determine whether or not a proposed use of someone else’s copyrighted works falls under the fair use exception. Understanding how to properly perform a fair use analysis and assert your fair use rights can help you to build upon others’ works with confidence.
Fair Use and Copyright – A Balance

Copyright in the U.S. is intended to promote the creation of new works by providing an incentive for creators. However, recognizing that new works often build on or incorporate existing works, the law strikes a balance between the rights of creators and the rights of users via exceptions to the exclusive rights of the creator.

The fair use exception is detailed in Section 107 of the U.S. Copyright Act. Unlike other copyright exceptions, fair use is flexible and can apply to a broad array of uses. It is designed to be adaptable to new uses and technologies so that Congress doesn’t have to create new exceptions before a new technology can be utilized.

The Four Factors

Most of the copyright exceptions are very specific about what kinds of uses may qualify for the exception and often include various restrictions about who can use the exception and under what precise conditions.

Fair use, on the other hand, is much more flexible and can apply to a wide variety of uses. Instead of specifying an exact type of user, type of material or amount that qualifies for this exception, the fair use statute provides a framework for the analysis and application of four factors that determine whether or not a particular use may qualify as fair use.

Here are four factors of fair use:

1. Purpose & character of use, including whether commercial (i.e. publishing a book) or non-commercial (i.e. using in a classroom assignment)
2. Nature of the original material (i.e., is the work published or unpublished? Fact or fiction? Highly creative?)
3. Amount and substantiality of the original work (are you using the entire work or just a portion?)
4. Effect on the marketplace or on the work’s value (will your use have a financial impact on the creator?)

When considering whether a proposed use of a copyrighted work may qualify as fair use, you must weigh all four factors together. Each factor is equally important.

Transformation

The courts have recently emphasized the concept of transformation or a transformative purpose, which falls under the first factor of fair use.
Transformation means that the way in which the work is being used is significantly different than the original use for which it was created. In many cases a transformative use of a copyrighted work will strongly favor a determination of fair use.

There are two ways in which a use can be transformative.

First, you could actually make changes to the original work in order to use it for a new purpose. An example would be to take short clips of popular movies and remix them to create a video for the purpose of social commentary or teaching.

The second form of transformative use does not require that you alter the original work in any way. Instead, you simply use the work for a purpose that is significantly different than the use for which it was created. An example of this would be using clips from a blockbuster movie that was originally sold for mass market entertainment for the purpose of teaching and research.

Evaluating Your Case for Fair Use

Copyright law lacks specificity, so it can be difficult to determine whether or not a particular use may qualify as fair use. Fortunately, there are a number of useful tools available online to help you consider the four fair use factors as they apply to your intended use.

In a fair use analysis, you consider each of the four factors in light of your proposed use and determine whether your use is favoring or opposing fair use for that factor.

You then weigh all four factors together. You cannot rely on a numerical tallying of criteria in favor and opposing fair use in order to make a determination. You must consider all four factors holistically and determine if, taken as a whole, they favor or oppose fair use, and to what extent (e.g. strongly favoring fair use, slightly favoring, etc.).

- If, overall, your use favors fair use, then you may proceed.
- If your use instead opposes fair use, you should reassess your use and determine if you can make any changes that could strengthen your case for fair use.

There are other tools in addition to the checklist that can help you conduct a fair use analysis. The American Library Association has developed a tool called the Fair Use Evaluator which can be found at the ALA website: www.ala.org.

Tips for Best Practice

While it is important to perform a fair use evaluation for each and every use of copyrighted material, there are some general rules that can often help you to strengthen a fair use claim.

Below are a few tips to consider when relying on the fair use exception in order to use copyrighted works in your endeavors.
- **Use only lawfully acquired copyrighted works** – To be able to claim fair use you must have used a legal copy of the original work.
- **Acknowledge all of your sources with a bibliographic citation** – Giving proper credit to the original creator demonstrates good faith and may help strengthen your fair use case.
- **Use only the amount of the original work that you need to accomplish your goal** – Since the amount of the original work that is used is one of the fair use factors, it is always important to only use what you need and not add extra material.
- **Restrict the audience and/or make only the number of copies that you need** – The less you copy and share the parts of the original work, the less effect you have on the market for it.
- **Use Creative Commons licensed or public domain works** – If you use works that expressly allow you to use them or have no copyright protection, you do not need to rely on fair use and can be more confident that your use is legal.
- **Use works that you created** – If you created it, you own the copyright, with the exception of works made for hire. (When you create things for your job, typically your employer owns the copyright.)
- **If you are in doubt about your fair use claim, either reassess and make changes to your proposed use in order to make a stronger claim or ask for permission to use the copyrighted material** – It is much easier to make changes or ask for permission before you use copyrighted material than to get hit with an infringement claim and have to make changes or face a law suit after your use.
Credits

The course pack is a compilation of Open Education Resources and original material written for OER use. All contents are used by permission and covered by a Creative Commons CC-BY-NC use.

Sources include:

*Choosing & Using Sources: A Guide to Academic Research.* Ohio State University Library

*The Process of Research Writing.* Steven D. Krause

*Writing Commons.* Joe Moxley, Ed.

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