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Citation Conventions

ABOUT THIS GUIDE
This guide describes the citation conventions that HBS students should use when writing research papers. For information about citing source materials not covered in this guide, please contact rreiser@hbs.edu.

PURPOSE OF CITATIONS
There are three main reasons to include citations in your papers:

- To give credit to the authors of the source materials you used when writing the paper.
- To enable readers to follow up on the source materials.
- To demonstrate that your paper is well-researched.

There are many ways to document your research. The following guidelines, based on The Chicago Manual of Style, present one method. Whichever method you choose, it is important to follow a format that is clear and consistent.

WHAT TO CITE
You should cite all direct quotations, paraphrased factual statements, and borrowed ideas. The only items you don’t need to cite are facts that are common knowledge, such as the year of the first U.S. stock market crash. However, if you present facts in someone else’s words, you should cite the source of those words. In addition, if you paraphrase large amounts of information from one source, you should cite that source, as emphasized in the following guidelines from sourcing expert Gordon Harvey:

> When you draw a great deal of information from a single source, you should cite that source even if the information is common knowledge, since the source (and its particular way of organizing the information) has made a significant contribution to your paper.¹

Failure to give credit to the words and ideas of another author is plagiarism. Most people do not intend to commit plagiarism but may do so inadvertently because they are in a hurry or because of sloppy work habits. For tips on how to avoid plagiarism, see the following resources:

TYPES OF CITATIONS: FOOTNOTES, SOURCE LINES, AND BIBLIOGRAPHIES

Citations can appear in three main forms: footnotes (or endnotes), source lines, and bibliographies. Each form contains similar information arranged in a different way. The following sections provide details about each form.

Footnotes and Endnotes

Footnotes and endnotes have the same function—to cite the exact page of a source you refer to in your paper. The only difference between footnotes and endnotes is placement: footnotes appear at the bottom of the page, whereas endnotes appear at the end of the document.

The main characteristics of footnotes and endnotes are as follows:

- They are preceded by a number.
- The author’s name is in natural order.
- The elements of the citation are separated by commas.

The following examples show a quotation and its corresponding footnote or endnote:

**Quotation cited in text**

Sahlman says, “Taking advantage of arbitrage opportunities is a viable and potentially profitable way to enter a business.” 32

**Corresponding footnote or endnote**


Source Lines

Source lines typically appear under charts, exhibits, tables, and other graphical items. Source lines should acknowledge the source of the graphic or the data that was used to create it. A source line begins with the word *Source* and continues with the same information that would appear in a footnote or endnote.

The following are some examples of source lines:

**Source**: Jon F. Thompson, *Cycle World*, vol. 35, no. 6 (June 2008), p. 23.


Bibliographies

A bibliography lists all of the references you used to create a research paper. The bibliography appears at the end of the paper, after the endnotes (if any).
Should You Include a Bibliography?

If you have included complete footnotes (or endnotes) and source lines in your paper, then you don’t need to include a bibliography unless your professor has requested one, or unless you want to provide a summary of the sources you used when writing your paper.

Formatting a Bibliography

Bibliographies have the following formatting conventions:

- The first author’s name is inverted (last name first), and most elements are separated by periods.
- Entries are arranged alphabetically by the author’s last name, or by the first word of the title if no author is listed.
- Entries have a special indentation style (*hanging indent*) in which all lines but the first are indented.

Examples of Bibliography Entries

The following are examples of bibliography entries:


Repeating a Citation

After the first complete citation of a work, you may abbreviate subsequent instances by using either Ibid. or a shortened form of the citation.

Ibid.

Use Ibid. to repeat a citation that appears immediately after the original one. Ibid. takes the place of the author’s name, the title of the work, and as much of the subsequent information as is identical. For example:


51 Ibid., p. 6.

If you are planning to rearrange your footnotes or endnotes later on, it’s a good idea to use the shortened citation form rather than Ibid.

Shortened Citation Form

Use the shortened citation form to a repeat citation that is after, but not contiguous to, the current one. This form is preferable to Ibid. for citations you intend to rearrange later.
The shortened citation should include enough information to help readers identify the source — i.e., the last name of the author; enough of the title to be clear; and the page number, if different from the first. For example:


2 [Citation of different source]

3 Hounshell, *From the American System*, p. 119.

**CREATING NEW CITATION STYLES**

If you can’t find an example of the type of source material you want to cite, and if you’ve exhausted other resources (including *The Chicago Manual of Style* and reiser@hbs.edu), then just cite all of the details that would help readers find the source easily. Think about the four “W”s: WHO created the work, WHAT is the title and type of information, WHEN was it published, and WHERE can readers find it?

The following examples show citations that were created without templates but that are precise and easy to follow:

Author’s e-mail survey of students from MBA class of 2013, November 16, 2012, Harvard Business School, Boston, MA.


Caroline J. Ferguson and Barbara A. Schaal, “Phylogeography of Phlox pilosa subsp. ozarkana,” poster presented at the 16th International Botanical Congress, St. Louis, 1999.²

When you’re citing unusual source materials, don’t be too concerned about following a particular format; instead, just include all of the details that would help readers locate the information quickly. (It’s usually better to provide too much rather than too little information.)

**PERMISSION REQUIREMENTS**

If you plan to publish your paper or distribute it beyond your classroom (e.g., on a website), and if the paper contains the following kinds of information, then you might need permission from the copyright holder:

- Graphical items (charts, graphs, maps, photographs, tables, etc.)
- Entire documents or articles
- Excerpts of text or data that are greater than 10% of the original

Be sure to check the copyright holder’s permission requirements before redistributing any of their information outside the classroom. (Citations for copyrighted information will vary according to each copyright holder’s requirements.) Note that the copyright holder might be a person, an organization, or even a state or national government.
Examples of Citations

This section shows examples for the most common types of source materials. For information about citing other materials, see Creating New Citation Styles on p. 7, or contact rreiser@hbs.edu.

A few notes:

ACCESS DATES – For brevity, access dates for URLs show only the month and year (e.g., June 2009). However, if you’re citing information that pertains to a time-sensitive field such as medicine, then it makes sense to include a complete access date.

CAPITALIZATION – Titles in citations are capitalized exactly as they appear in the source documents. For example, under Analyst Reports, the first two examples use sentence-style capitalization, whereas the next two use headline style. These styles reflect the capitalization of the original documents.

FOOTNOTE VS. BIBLIOGRAPHY FORMAT – Most examples appear in both footnote and bibliography format. Although your paper will probably require citations in footnote format only, the bibliography format is shown in case your professor wants you to include a bibliography.

URLs – In the examples, some URLs have been replaced by [URL]. In your paper, you should replace [URL] with the actual URL, or with a shortened URL if space is limited.

ADVERTISEMENTS

On the Web

Footnote

Bibliography

ANALYST REPORTS

Signed (on the Web)

Footnote
Bibliography

Unsigned

Footnote

Unsigned (via database)

Footnote

ANNUAL REPORTS (PRINTED)

Footnote
4 General Motors, 2001 Annual Report (Detroit: General Motors, 2002), p. 34.

Bibliography

NOTE: Publication details, such as the location and name of the publisher, are optional in citations of annual reports — e.g., the following format is also fine: General Motors, 2001 Annual Report.

ANNUAL REPORTS (ONLINE)

On the Web

Footnote

Bibliography

On the Web (via database)

Footnote

Bibliography
General Motors. 2010 Annual Report. Thomson Reuters/Investext, [access date].
ARTICLES

See Newspapers; Periodicals.

BLOGS

In the first example below, “blog” is in parentheses because it’s not part of the blog title. In the second example, “blog” is italicized and capitalized because it is part of the blog title.

Blog post

Footnote


Footnote


Comment on blog post

Footnote


BOND PROSPECTUSES

Footnote

8 Formula One Finance B.V., August 1999 prospectus for US$1.4 billion of 100% Secured Floating Rate Notes, due 2010.

Bibliography

Formula One Finance B.V. August 1999 prospectus for US$1.4 billion of 100% Secured Floating Rate Notes, due 2010.

BOOKS (PRINTED)

One author

Footnote

Bibliography


**Two authors**

Footnote


Bibliography


**Three authors**

Footnote


Bibliography


**More than three authors**

Footnote


Bibliography


**Editor**

Footnote


Bibliography

Multiple editors

Footnote


Bibliography


Corporate author (organization, association, or corporation)

Footnote


Bibliography


Edition

Footnote


Bibliography


Chapters or other titled parts of a book

Footnote


Bibliography

Footnote


Bibliography


BOOKS (ONLINE)

See E-Books.

BROCHURES

According to the *Chicago Manual of Style*, “pamphlets, corporate reports, brochures, and other freestanding publications are treated essentially as books.”

Signed

Footnote


Bibliography


Unsigned

Footnote


Bibliography


Footnote


Bibliography

CASES (PRINTED)

Printed

Footnote


Bibliography


CASES (ONLINE)

On the Web

Footnote


Bibliography


Footnote


Bibliography


CHARTS

When citing a chart, illustration, or other graphical item, use the same style that is used to cite tables. See Tables.

CITATION WITHIN A CITATION

See Secondary Sources.
CLASSROOM DISCUSSIONS

Footnote

Bibliography

COMPILED INFORMATION
The way you create a graphical item like a chart, exhibit, or table determines how you should word the source line for it. The following examples show source lines that vary according to how the item was created.

Item copied directly from a single source
Source: [Citation of SOURCE—e.g., author, title, publisher, date, etc.]

Item compiled from multiple sources
Source: Compiled from [SOURCE 1], [SOURCE 2], and [SOURCE 3].

Item compiled from multiple sources, including the author's own calculations
Source: Compiled from [SOURCE 1], [SOURCE 2], and author’s calculations.

Item in format created by the author, but based on data from multiple sources
Source: Author, based on data from [SOURCE 1], [SOURCE 2], and [SOURCE 3].

See also Tables.

CONFERENCE PAPERS

Published (in printed form)

Footnote

Bibliography
Published (in online form)

Footnote


Bibliography


Unpublished

Footnote


Bibliography


DATABASES

To cite information you retrieved from a database, see Citations of Commercial Databases on p. 37.

DOWNLOADED DOCUMENTS

Footnote


E-BOOKS

E-books can include PDF and HTML files as well as files optimized for e-readers such as the Amazon Kindle or Apple iPad. To cite an e-book, include the same information you would include when citing the printed version, but change the publication date and add the type of e-reader. In addition, include the URL if you read the e-book on the Web.

NOTE: The following examples are in footnote format only.
on CD-ROM


NOTE: If there are no page numbers, it’s fine to cite a chapter number, section name, or whatever type of locator that is used to organize the book.

on iBook


on Kindle


on Kobo


on Nook


PDF E-book


E-MAIL

Footnote

1 Sender’s Name, “Subject,” e-mail message to Recipient’s Name, Date.

NOTE: The Chicago Manual of Style says the following about e-mail addresses in citations: “An e-mail address belonging to an individual should be omitted. Should it be needed in a specific context, it must be cited only with the permission of its owner.”

7
FACEBOOK POSTS

The following examples are in footnote format only.

Generic example

1 Username or Group Name, “First few words of post,” Facebook [type of page], Date, Time, URL, Access Date.

Specific examples


Comment on Facebook post


FILMS

See Movies; Videos; Webcasts.

GOVERNMENT DOCUMENTS

According to the Chicago Manual of Style, “[B]ills or resolutions originating in the House of Representatives are abbreviated HR or HR Res., and those originating in the Senate, S or S Res. (all in roman). The title of the bill is italicized; it is followed by the bill number, the congressional session, and (if available) publication details in the Congressional Record.”

Congressional bills

Footnote


Bibliography

Congressional hearings, published

Footnote


Congressional hearings, unpublished

Footnote


Bibliography


Report for a public hearing

Footnote


Bibliography


Report of U.S. presidential commission (online)

Footnote


Bibliography

Testimony before congressional committee (printed)

Footnote

United States Code

Footnote

For more examples of citing government documents, see the information about public documents in The Chicago Manual of Style, 15th ed. See also the University of Nevada at Reno Knowledge Center website, http://knowledgecenter.unr.edu/help/manage/government_cite.aspx#links.

ILLUSTRATIONS

When citing a chart, illustration, or other graphical item, use the same style that is used to cite tables. See Tables.

INTERVIEWS

Television12

Footnote

Bibliography

Published or recorded

Footnote

Bibliography
Unattributed

Footnote

21 Interview with health care worker, August 1, 2006.

Unpublished

Footnote

14 Gene Powell, interview by author, Fort Worth, Texas, July 26, 2011.

Bibliography

Powell, Gene. Interview by author. Fort Worth, TX, July 26, 2011.

JOURNALS

See Periodicals.

LEGAL CASES

The following examples are in footnote format only.

U.S. Supreme Court


Lower federal courts


State and local courts


For more examples of legal citations, see the following resources:


The Bluebook: A Uniform System of Citation (Harvard Law Review Association).

Association of Legal Writing Directors, ALWD Citation Manual: A Professional System of Citation, 4th ed. (Aspen Publishers, 2010).

Introduction to Basic Legal Citation, ed. Peter W. Martin (Cornell Law School, Legal Information Institute, 2010), http://www.law.cornell.edu/citation/.
MAGAZINES
See Periodicals.

MAPS

Public domain maps

Footnote

Bibliography

Footnote

Bibliography

Copyrighted maps

Footnote
17 Used by permission of Graphic Maps, a d/b/a of the Woolwine-Moen Group, © 2007 Graphic Maps. All rights reserved. [URL], accessed July 2007.

Bibliography
Graphic Maps, a d/b/a of the Woolwine-Moen Group. © 2007 Graphic Maps. All rights reserved. [URL], accessed July 2007.

NOTE: The wording of citations for copyrighted information will vary according to each copyright holder’s requirements.

MARKET RESEARCH REPORTS

Footnote
Bibliography


MEMORANDUMS

Footnote
30 Harold Lehman to Runako Gregg, memorandum regarding [subject], [date], [company], from [source of memorandum—e.g., company, person, or external source].

Bibliography
Lehman, Harold, to Runako Gregg. Memorandum regarding [subject], [date], [company].
From [source of memorandum—e.g., company, person, or external source].

MINISODES

Footnote
31 “Arnold the Entrepreneur,” minisode adapted from same episode on *Diff’rent Strokes* (NBC, Season 7, Episode 8, originally aired November 17, 1984), available from YouTube, [URL], accessed April 15, 2009.

MOVIES

Footnote
32 *Jerry McGuire*, directed by Cameron Crowe (Columbia/TriStar Pictures, 1996).

Bibliography

Movie (DVD)

Footnote
33 *Jerry McGuire*, directed by Cameron Crowe (Columbia/TriStar Pictures, 1996; Sony Pictures, Special Edition DVD, 2002).

Movie (Blu-ray Disc)

Footnote
33 *Jerry McGuire*, directed by Cameron Crowe (Columbia/TriStar Pictures, 1996; Sony Pictures, BD, 2008).

See also *Videos; Webcasts*. 
NEWS RELEASES

See Press Releases.

NEWS WEBSITES

Signed article

Footnote


Bibliography


Unsigned article

Footnote


Bibliography


NOTES: In a bibliography entry for an unsigned article, the name of the news organization (e.g., CBS News) should stand in place of the author’s name.\textsuperscript{16}

The names of news websites (e.g., Reuters, CBS News) should appear in roman (vs. italic) type.

NEWSPAPERS (PRINTED)

Signed newspaper article (in a specific section)

Footnote


Bibliography

Unsigned newspaper article

Footnote

Bibliography

Unsigned newspaper editorial

Footnote

Bibliography

NOTE: In a bibliography entry for an unsigned editorial, the name of the newspaper (e.g., The Wall Street Journal) should stand in place of the author’s name).17

NEWSPAPERS (ONLINE)

Footnote

Bibliography

NEWSWIRES

The following examples are in footnote format only.


NOTES

HBS technical notes are often referred to as notes. When citing notes, use the same style that is used to cite cases.

Printed

Footnote

Bibliography

Online

Footnote

Bibliography

PERIODICALS (PRINTED)

Signed articles

Footnote

Bibliography

Footnote

Bibliography
Unsigned articles

Footnote

Bibliography

Footnote

Bibliography

NOTE: According to the Chicago Manual of Style: “In citations to a particular passage in a journal article, only the pages concerned are given. In references to the article as a whole (as in a bibliography or reference list), first and last pages are given.”

PERIODICALS (ONLINE)

Article from online journal or magazine

Footnote

Bibliography

Signed

Footnote

Bibliography
Unsigned

Footnote


Bibliography


PODCASTS

As the following examples show, some websites use the term podcast or webcast and others specify the file type, such as audio or video.


See also Webcasts.

POWERPOINT PRESENTATIONS

Footnote


Bibliography


See also Conference Papers (unpublished).
PRESS RELEASES

Printed

Footnote

Bibliography

On the Web

Footnote

Bibliography

PROCEEDINGS

See Conference Papers.

RADIO PROGRAMS

Footnote

Bibliography

Footnote

See also Podcasts.
**RESEARCH PAPERS**

See *Working Papers*.

**SEC FILINGS**

Footnote

Bibliography

Footnote

Bibliography

**SECONDARY SOURCES**

It is best to consult an original source whenever possible, but if the original source is unavailable, use the following citation style. (In the following examples, the Zukofsky article is the original source.)

Footnote

Bibliography

**SPEECHES**

Footnote
TABLES

Source lines are typically used to cite the source of a table or other graphical item. The following examples are in both source line and bibliography format.

Data from a table

Source line


Bibliography


Entire table (or other graphical item)

Source line

Source: Michael E. Porter, Competitive Strategy (New York: The Free Press, 1998), p. 73, Figure 3–4. Used with permission from The Free Press.

Bibliography


TECHNICAL NOTES

HBS technical notes are often referred to as notes. See Notes.

TELEVISION PROGRAMS

Footnote


Bibliography


THESES AND DISSERTATIONS

Footnote

Bibliography


TRANSCRIPTS

Conference speech

Footnote

Person’s Name, Person’s Title, remarks made to [person] at [conference name], Location, Date. From transcript provided by CQ FD Disclosure, URL, access date.

Television program

Footnote


TWEETS

The following examples are in footnote format only.

Generic Example

First Name, Last Name (Twitter handle), “The tweet in its entirety,” Twitter post [or Tweet], Date, Time, URL.

Specific Examples

Tyra Banks (tyrabanks), “Broke up with the gym this morning. It just wasn’t working out,” Twitter post, 24 June 2013, 7:11 a.m., https://twitter.com/tyrabanks.

Academy of Medical-Surgical Nurses (AMSN), “Writing a letter to an elected official can be a great way to be someone who actually makes a difference,” Twitter post, 7 April 2011, 5:51 a.m., [URL].

NOTE: If the company’s name and Twitter handle are the same, then it’s OK to omit the Twitter handle from the citation. For example:

TechCrunch, “Apple Re-Invents Its Wheel with iOS7, Takes Developers Along For the Ride,” Tweet, 18 September 2013, 12:20 p.m., [URL].

MarketWatch, “He’s baaaaack. Furby reclaims spot on Wal-Mart’s list of ‘hot’ holiday toys,” Tweet, 15 September 2013, 4:35 a.m., [URL].

NOTE: If the citation includes the complete text of the tweet, then the URL is optional. For example:
The Economist, “When the Frankfurt motor show opens this weekend visitors will encounter many new electric vehicles,” Twitter post, 12 September 2013, 6:43 p.m.

**UNPUBLISHED PAPERS**

**Footnote**


See also *Working Papers*.

**VIDEOS AND MULTIMEDIA**

**Commercial video**

**Footnote**


**Footnote**


**HBS video (multimedia)**

**Footnote**


**Bibliography**


**HBS video (special event)**

**Footnote**

Bibliography


YouTube video

Footnote

Bibliography


Footnote

Bibliography


WEBCASTS

As the following examples show, some websites use the terms podcast or webcast and others specify the file type, such as audio or video.

Footnote

Bibliography


Footnote

See also Podcasts; Videos and Multimedia.
WEBSITES

Company website

Footnote

Bibliography

Personal website

Footnote

Bibliography

Other kinds of websites

Footnote

Bibliography

WORKING PAPERS (PRINTED)

NOTE: The copyright holder for an academic working paper is typically the author.

Printed

Footnote

Bibliography
Footnote


Bibliography


WORKING PAPERS (ONLINE)

On the Web

Footnote


Bibliography

Citations of Commercial Databases

This section shows how to cite information from commercial databases. A few notes:

- Brackets [...] indicate variables to be supplied by the writer.

- When you cite information from a database, remember to mention both the copyright holder/owner of the information, and the provider that made it available. In addition, if you want to distribute the information outside the classroom, you should seek permission from the copyright holder. **Be sure to check the copyright holders’ requirements before distributing any of their information outside the classroom.** The Terms & Conditions link in most databases provides guidelines for using and citing their data.

- URLs are optional in database citations. If you include a URL, use only the briefest form which points to the main page of the database.

- The following examples cover some of the most frequently used databases at Baker Library. To cite other databases, try to adapt these examples, or contact rreiser@hbs.edu.

**ABI/INFORM**

**Generic Example**

Source: [Description of information — e.g., author, title, publisher, date, etc.], ABI/INFORM via ProQuest, accessed [month/year].

**Specific Example**


**BCC Research**

**Information Owned by BCC**

Source: BCC Research, accessed [month/year].

**Other Information**

Source: [Description of information], via BCC Research, accessed [month/year].

**Bloomberg**

**Information Owned by Bloomberg**

Source: Bloomberg LP, accessed [month/year].

**Other Information**

Source: [Description of information], via Bloomberg LP, accessed [month/year].

**Business Source Complete**

Source: [Description of information], Business Source Complete, EBSCO.
Capital IQ (see Standard & Poor’s)

Compustat (see Standard & Poor’s)

Datastream

Information Owned by Datastream
Source: Thomson Reuters/Datastream, accessed [month/year].

Other Information
Source: [Description of information], via Thomson Reuters/Datastream, accessed [month/year].

Deal Pipeline (The)
Source: [Description of information], The Deal Pipeline, accessed [month/year].

Economist Intelligence Unit (EIU)
Source: Economist Intelligence Unit, [Description of information — e.g., EIU Country Data or EIU Country Report, author, title, date, etc.], accessed [month/year].

eMarketer
Source: [Description of information], eMarketer, accessed [month/year].

Euromonitor (see Passport)

Factiva
Source: [Description of information], via Factiva, accessed [month/year].

Forrester
Source: [Description of information — e.g., author, title, volume no., date, etc.], Forrester Research, Inc., accessed [month/year].

Frost & Sullivan
Source: [Description of information], Frost & Sullivan, accessed [month/year].

Gartner Online Information Resources
Text:
Source: [Description of information], Gartner, Inc., accessed [month/year].

Graphics:
Source: [Source line under graphic], as published in [description of info.], Gartner, Inc., accessed [month/year].
Global Financial Data
Source: [Description of information], Global Financial Data, Inc., accessed [month/year].

Hoover’s
Information Owned by Hoover’s
Source: [Description of information], Hoover’s, Inc., accessed [month/year].
Other Information
Source: [Description of information], via Hoover’s, Inc., accessed [month/year].

I/B/E/S
Source: Thomson Reuters I/B/E/S, accessed [month/year].

IBISWorld
Source: [Description of information], IBISWorld, accessed [month/year].

IDC
Source: [Description of information], IDC, accessed [month/year].

ISI Emerging Markets
Information Owned by ISI
Source: [Description of information], ISI Emerging Markets, accessed [month/year].
Other Information
Source: [Description of information], via ISI Emerging Markets, accessed [month/year].

JSTOR
Source: [Description of information], via JSTOR, accessed [month/year].

LexisNexis
Source: [Description of information], via LexisNexis, accessed [month/year].

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