HELPING STUDENTS IMPROVE CITATION PERFORMANCE

Brian Nienhaus
Elon University

DURING MY FINAL YEAR in graduate school, I began teaching business communication. Without much forethought, I asked students to write a report with a sources requirement. When students turned their reports in, I learned that we were worlds apart on the practice of citing such sources. As a student in a rarefied academic environment, I wrote with proper citations. My students did not. I spent classroom time discussing citation practice. Their performance did not improve. In this article, I describe an approach to citing sources in a business context that has improved students' performance.

Students have long struggled with citation (Moeck, 2002; Wilhoit, 1994), and the causes of their poor performance are uncertain. The ESL literature does suggest one cause: Students from some cultures find the concept of intellectual property immoral, so for that small subset there is an explanation for poor citation practice (Thompson & Williams, 1995). But studies of U.S.-born students show that a large number of individual and contextual factors may be implicated (McCabe, 1992; McCabe, Treviño, & Butterfield, 2001). Students continue to feign ignorance or deflect criticism onto others, even after prior instruction has been documented.

My approach to the performance problem has been to assume that business writing is different from academic writing and that if those differences are fully embraced, one may find new motivations to cite and different formatting requirements. The idea stemmed from my experience with students who came to business communication thinking they could not write well (as evidenced by their reflections in the self-assessment memo assignment in Locker, 2003) but who found they could write better and more confidently when they had definite tasks

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and readerships for guidance. Could their citation performance also improve if presented with a business context? There was not much information available on actual business citation practice then, so the ideas in this article only partially reflect recent findings (Krapels & Davis, 1999). I also suspected that good citation performance would not completely mirror academic standards for citation (Hiemstra, 2002) because a business reader's needs might be different from ours.

In recasting citation as a business practice, I was mostly guided by one general principle: orientation to the business reader. A one-page handout summarizes the results of my research and experiments in class (see the appendix) and has helped students understand the process. The rest of this article comments on each of the major sections of the handout.

REASONS FOR CITING

Students mention the law frequently in class as the reason for citing sources, but they have yet to make their living by producing intellectual property, either as writers or performers or as academic professionals. Right now, intellectual property rights intersect with students' lives primarily through attempts to freely download music and video from the Web. Unless they have been professional musicians themselves, it is in their interest to acquire music for free. Some students may envision a future personal interest in intellectual property rights, but at present, as undergraduates struggling to put together a paper for a course, they may calculate as slim their chances of being caught using a source's ideas or words without giving proper credit. Thus undergraduates need other reasons to cite properly. The handout notes two that work well: consequence and vertical relationship management (credibility).

Using comments from nontraditional students or from students who have returned from internships, we discuss in class the kinds of consequences that can follow from actual business writing. What one writes may lead to the hiring or firing of colleagues. Large sums of money, too, can ride on what one writes. Presently, I introduce citation concurrently with an assignment in which students are to imagine they are university purchasing officers. They have to research and write a report that may lead to the university's purchasing of a product or service. I tell them a story about someone who recommended one model of a copier-fax-printer-scanner for a company's business offices based on its superior service warranty. Because a $100,000 purchase was riding on those facts, they should have been accurate. They were not.

Moreover, the information came from a phone conversation with a sales representative who could not later be tracked down, making the situation worse. I use the example to demonstrate the need to document a source when the facts are key and the writing consequential and to support later instruction on how to classify sources and write the source notes. Consequence, then, is introduced as a business-related motivation for documenting sources.

Krapels and Davis (1999) found vertical relationship management, or credibility, to be a reason for documenting sources in business writing, especially to support arguments in persuasive tasks. For my undergraduate students, I have focused on the more circumscribed bad news situation rather than on credibility in general. If one is a subordinate faced with the task of telling the boss something she or he may not want to hear, one is in a politically difficult situation. To reduce personal risk, one finds a source to deliver the bad news. If the boss becomes upset, she or he likely will criticize the source (or sources) before she or he criticizes the writer. Students respond positively to this idea, possibly because they can try the strategy right away in their other classes. Most of their writing has been upward communication with folks like us.

CITATION STYLE

Standard stylebook instructions for parenthetic notation emphasize reader orientation and ease in moving back and forth between text and source or reference list. But a business context introduces other complications addressed in examples shown in the handout (see the appendix). As a result, I have developed practices for class that differ from some we find in contemporary style manuals (*Chicago Manual of Style*, 2003; *Publication Manual of the American Psychological Association*, 2001; Trimmer, 1999).

Except for the Clark citation, the samples in the handout follow American Psychological Association (APA) style; the last is from the current APA *Publication Manual* (2001, p. 272). When I discuss reference formatting, I talk about the concept of discourse communities to set up the idea that each community may have its own needs and, therefore, may develop different format requirements. Many students are familiar with two such communities—humanities and Modern Language Association (MLA) and social sciences and APA—and understand that even within the academy, variation exists in citation practice.

We then capitalize on the idea of variation. Business is a different discourse community that is still in the process of codifying its practices.

As Sabin suggests in *The Gregg Reference Manual* (2001), for busy business writers and readers, what is needed is a simple, reader-friendly citation and referencing system. That is why I ask for parenthetic citation with alphabetized, reverse-indented references. Chicago, APA, MLA, and Gregg are all adequate on this criterion. Students may use any of them and even develop their own idiosyncratic formats as long as they use reader ease as their guide. Practically, that has meant that they make sure their entries are parallel in structure: Similar kinds of sources must be presented in visually and grammatically similar ways.

Considering business readers' needs further, I have found one area of substantial difference from academic readers' needs as currently articulated in the style manuals. Business writers may make more frequent use of unpublished sources—information from personal or telephone interviews, for example, or from product or service point-of-purchase displays—and somewhat less frequent use of information from published books and articles than academics normally do, primarily because information from the former tends to be much more current. To reflect this possibility (we need research on business practice here), I ask students to do the following:

- Classify sources as secondary if published on paper or electronically and primary if not.
- Provide contact information for primary (unpublished) sources in the reference entries.

In APA and MLA, *primary* sources mean the original published sources, whereas *secondary* means something like an abstract of the original published source or use of that source's information when drawn from another source using or citing it (*Publication Manual*, 2001; Trimmer, 1999). In many of the report-writing chapters of our business communication texts, students learn that *primary research* is something they conduct themselves, as when they develop and conduct a survey, and *secondary research* refers to information from a published research study. For the academic community, moral emphasis is given to the use of primary sources. "In scholarly research," the *Publication Manual* (2001) offers, "it is preferable to read and cite primary sources whenever possible" (p. 245). "To cite a source from a secondary source . . . is generally to be discouraged," notes the *Chicago Manual* (2003), "since authors are expected to have examined the works they cite" (p. 727).

The academic's moral emphasis makes sense when we consider its community's needs. Academic discourse can be complex and nuanced. Much can be lost in trying to apprehend secondhand something Heidegger was trying to express. Best practice, then, is to encourage students and colleagues to wrestle with Heidegger directly before trying to make use of his thought. In addition, the practice encourages the use of *primary* and *secondary* as ways to classify two distinct types of published sources.

For students in my business writing classes, however, that usage does not seem appropriate. Do we need to reserve the terms *primary* and *secondary* to indicate when a business writer is consulting an original published source rather than an abstract? Do business writers need those terms to signal a distinction between originally gathered and published research? In both instances the answer is occasionally yes, but only occasionally. Although business professionals share the craft of writing with their academic colleagues, their organizational contexts evoke different needs, particularly in the types of sources they will tend to consult.

For my business communication students, then, I classify secondary sources as published and primary sources as unpublished. This typology prepares them for the actual research they will do and for my specific requirements concerning unpublished sources. For the purchasing report assignment, I require sources but do not specify the type. Instead, I ask them to use sources that will help them produce a report of use to the university in purchasing a product or service. The reports will either aim at replacing something the university already has but that does not work (the dryers in our campus's new dormitories do not dry clothes well, for example) or at purchasing something new (say, DVD burners for some of the computer labs, with who knows what implications for intellectual property rights).

Students tend to conduct research in two areas: end users and administrators of the product or service in a particular part of campus and vendors of the products or services. To garner information from end users and administrators (often in the Physical Plant Department or the Office of Student Life), students are mostly interviewing real people face to face, by telephone, or via e-mail. To gather vendor information, students call distributors, hit the Internet, or visit retail outlets. They are producing typical business reports. What is striking are the kinds of sources they consult in the process. The majority of the sources are unpublished—people and point-of-purchase displays and brochures. Once students finish gathering their data and start writing their reports, they consult a style manual for help with their references. It is then that they discover that academic manuals are great for published sources but inadequate for unpublished ones. They then consult the class handout for procedures to handle primary sources to serve business readers more adequately.

For published sources, following the manuals will result in an entry readers can use to track down that source for themselves. Standard practice will not, however, allow a business reader to track down an unpublished source. Here is how MLA would have us write the first sample reference entry for Clark given in the handout:

> Clark, James. Telephone interview. 5 March 2004.

Were the contact via e-mail, MLA would give us

> Clark, James, "Careers in Battery Research." Email to Brian Nienhaus. 5 March 2004.

The *Chicago Manual* (2003) indicates that information from conversations and e-mail rarely finds its way onto the reference page, and therefore, it provides no examples (p. 706). The information is referenced in a parenthetic note or footnote in the text, with content similar to the MLA examples above. The APA *Publication Manual* (2001) follows the *Chicago Manual*, justifying the absence of reference entries by saying, "Because they do not provide recoverable data, personal communications are not provided in the reference list" (p. 224). Unpublished sources, across the board, would have minimal or no presence in reference lists if business students follow current guidance provided in the academic style manuals. Why? The manuals mostly follow the needs of academic readers, and our discourse community has preferred published sources.

Recall Neil Postman's (1986) description of a graduate student who, unfortunately, tried to insert information from a personal interview into his doctoral thesis. "This citation," Postman wrote,

> drew the attention of no fewer than four of the five oral examiners, all of whom observed that it was hardly suitable as a form of documentation and that it ought to be replaced by a citation from a book or article. (p. 20)

Postman went on,

> The student protested that the information was valid. He had even included the names of two witnesses to the conversation in the reference note, but to no avail. The committee responded that for the academic community, the written word had greater prestige and credi-

> bility than the spoken word, mostly because of its endurance on a printed page and its having survived an editing and reviewing process. The clincher, perhaps, was when the committee asked the candidate if he would prefer oral or written confirmation of his having passed his examination. The student wanted the event recorded in writing, so he found a published source to say what he wanted said at that point in his work. (p. 21)

We academics are socialized to prefer the written, published word, and appropriately so. But consider again the example of a business writer trying to determine which all-in-one office machine to purchase to replace all the existing faxes, printers, scanners, and photocopiers in her company's headquarter offices. Let us say her report will lead to the purchase of 200 machines, at about US$500 each. That is a US$100,000 purchase. She has closely evaluated three candidates and is recommending one machine because the manufacturer provides a full 5-year warranty—much longer than the other warranties the other manufacturers are offering. She learned the details of the warranty in a phone conversation with a vendor. She reports the warranty facts with a text or source note following APA, MLA, Chicago, or Gregg style. Now, what if the warranty facts are wrong? What if she had been on the phone with a dishonest sales representative for the vendor, a person willing to make up facts to close a sale? It is true that if she followed the members of that doctoral committee in insisting on written documentation and acquired the warranty information in writing, she would be on solid ground in recommending the purchase of that particular all-in-one office machine. If the vendor tried not to honor the warranty, the company would have documentation to help enforce its terms. Business writing needs do not conflict with Postman's (1986) account of academic needs, at least in the abstract.

But in organizational practice, business writers may need a different take on unpublished sources. Purchasing officers write many short recommendation reports. They include facts garnered from numerous unpublished sources. If they have to wait for paper or fax documentation of all facts, their work would slow down. Why not adopt a new practice in business documentation: Include contact information for unpublished references, such as phone calls with salespeople or facts garnered from a retail display. In this way, when reading the reports and lighting upon a key fact, the writer's colleagues or supervisor can simply pick up the phone or use e-mail to double-check the fact, possibly asking for fax confirmation if the issue is important enough. Paper is probably best, but in fast-paced environments, allowing people to be used as sources and asking the writer to provide the person's name, title, organization, date, type of contact, and phone number seems a reasonable compromise. In addition, in fluid, changing, competitive market environments, product technologies and prices can change so quickly that facts can become obsolete by the time they are committed to paper or have gone through a publishing process. Business writers, then, may wish to use citation practices that can handle more adequately fast-changing facts from unpublished sources.

These considerations stand behind the current style instructions I give to my students. They may use an existing style or develop a new one, but they need to be consistent in the development of their entries, and they must include contact information for their unpublished sources. We reserve the term *primary* for those unpublished sources, and that word itself signals the need to include contact information. It becomes a citation and referencing strategy that feels more logical given the type of writing students envision that they will do as business professionals and squares with a minimalist version of a formatting strategy for business (Sabin, 2001).

PARAPHRASING

I prohibit direct quotation for the following reason: In the past, I often would read a piece of student writing and note that the student was doing reasonably well. Suddenly, a strange voice would enter the paragraph, and typically the voice would talk about something other than what the student was talking about. The result was disruption, and it was happening because I had given a short business writing assignment and had required sources. The offending students complied by shoehorning pieces of quoted material somewhere into their papers. Their guiding assumption was to credit sources when one quoted them. My first response as a teacher was to let them know how infrequently sources were quoted directly in academic and professional writing. We typically paraphrase (Mills, 1994). Still, the disruptions continued until one day I decided to outlaw direct quotes completely. For the past 10 years, I have had students paraphrase all source information, so that everything I read is to have been written by them. The risk has been that they would paraphrase inaccurately, but in return I rarely receive papers with disrupting foreign voices, and in the process of presenting this requirement I compliment the students by letting them know that I am more interested in what they themselves write. Occasionally, a student is upset at the prohibition. If so, she or he can bring in a draft and show me where a direct quote will help. I will then give permission to quote.

I do not teach paraphrasing generally, but I have found some students erring (and possibly plagiarizing) by copying point-of-purchase or Internet product advertising copy word for word. The instances are easy to spot. Currently, I show students that it is unproductive to offer readers a phrase like "innovative, state-of-the-art microtextured FiberEX mobile platform construction" when describing a property of a candidate treadmill for a university exercise facility. Readers likely do not have the source handy when they read that section of the report. They will not understand the marketing language and thus will need a translation, which for the above might be something like, "a lighter, stronger tread platform than the other candidate treadmills." With one or two similar examples, most students get the point, so this particular error in paraphrasing now occurs less frequently.

Some difficulties have emerged with Internet sources. Students frequently encounter unauthored information on the Web. In those instances I ask them to create an authorial entity (Guffey, 1997). Frequently, especially with unauthored Web sites, students want to use only the URL for both the parenthetic note and the corresponding source entry. In their experience, the URL should be sufficient—all one has to do is type it in the computer and up it comes. My response is that a busy business reader must decide whether to consult the source, and to do that, they need to know what kind of source it is. For that reason, Internet sources must have not only an authorial entity and an access date (Griffin, 2003) but a description of the type of site as well. In the past academic year, about 85% of my students used sources properly in their first report drafts. Of the 15% who did not, two out of three failed by presenting the URLs instead of fully developed notes and entries. I am employing examples in class to address the problem. It is one area where current style manuals also provide substantial help (*Publication Manual*, 2001).

This article describes an approach to citation practice developed during the past 12 years, guided by consideration of business readers' needs. As the pieces of this approach to teaching citation have fallen into place, I have noticed improved student performance. Plagiarism has become a minor occurrence. One reason may be the assignment of highly situational, practical writing tasks. Another is that the guidelines encourage students to see citation as influenced by reader orientation, which reinforces the central principle we stress in business writing. Citation has become more enjoyable to teach, possibly because it no longer rests solely on intellectual property law, which is often personally irrelevant to or even suspiciously regarded by undergraduate students. They see the reasons for citation as more logical and strategic; the challenge then becomes how to use their judgment and cite well. Most are meeting the challenge.

APPENDIX
Using and Citing Sources in Business Reports

Why Cite Sources?

- By law, to give credit to those whose ideas we use in our writing
- To allow colleagues and supervisors to verify key facts and arguments
- To protect ourselves from direct criticism for ideas we suspect our readers may not like

How to Cite Sources?

There are many ways, but one that is easy to use is the parenthetic method (*Publication Manual*, 2001). Every place we've used information from a source in our document, we give credit with a note such as the one you've just seen. At the end of the document we create a sources list, and in it we create entries to give full information for each of the sources to which we've referred in parenthetic notes in our document.

What is "full information for each of the sources"? It is the information readers need to find the source themselves. You can use a style manual for help for published secondary sources like books and journal articles (*Publication Manual*, 2001) as well as for the Internet (VandenBos, Knapp, & Doe, 2001), but when you use primary sources in business reports, you'll need to include the name of a person, their organization and title, and contact information, typically an e-mail address or a telephone number. The Clark example below illustrates how to present a primary source (2004). In general, as you write your source entries, ask yourself if a reader will understand what kind of source each entry is and whether, with the information you have provided, they could track the source down for themselves. If your answer to both questions is yes, you will have produced a useful source entry for your business reader.

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Format Requirement for Source Entries

You may use any style manual as a guide, or develop your own style, but make sure your source entries are

- Arranged in alphabetical order
- Reverse-indented (use the "hanging" option in the format/paragraph menu in Word)
- Single-spaced, but with a line skipped between each entry
- Matched accurately with the word or words your readers encounter in the corresponding parenthetic notes in your document
- Consistently formatted by type of source: book, phone interview, etc.

Writing Requirement: Paraphrase Source Information

Do not quote interviewees or written material directly. Instead, put their information into your own words or in tables of your own design, and give them credit with parenthetic notes. If you wish to quote directly anywhere in your writing, consult with me first.

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Address correspondence to Brian Nienhaus, Martha and Spencer Love School of Business, Elon University, 2075 Campus Box, Elon NC 27244-2020; e-mail: bnienhaus@elon.edu.