Ministry of Higher Education and Scientific Research

University of 20 August 1955 – Skikda

Faculty of Letters and Foreign Languages · Department of Foreign Languages

COURSE PACKAGE

Research Methodology

COURSE TITLE	Research Methodology (MTU)
LEVEL	Master One
MAJOR	Civilization and Literature
HOURLY VOLUME	3 hours per week
TEACHER	Dr. Soumaya Bouacida

Academic Year 2025–2026

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Course Overview

1. Course Description

This Research Methodology course provides systematic training in the principles and practices of academic research in history and literature. The course is structured around five core units that progress from foundational concepts to specialized methodologies and proposal development. Students will master essential research-integrity practices, develop sound analytical and note-taking techniques, and learn to navigate both historical and literary research methodologies. The course emphasizes practical application through hands-on activities, critical-analysis exercises, and the development of complete research proposals, preparing students to conduct original scholarly research while maintaining the highest standards of academic integrity in both disciplines.

2. Course Objectives

By the end of this course, students will be able to:

- Understand the systematic characteristics of academic research in historical and literary contexts.
- Recognize and avoid the various forms of plagiarism while applying MLA (8th edition) citation practices.
- Apply appropriate data-collection strategies, source-evaluation criteria, and analytical techniques in both literary and historical investigations.
- Master summarizing, paraphrasing, direct quotation, and synthesis to organize and integrate research materials effectively.
- Evaluate primary and secondary sources using the criteria of accuracy, authority, coverage, and relevance, while applying appropriate critical frameworks.
- Select and implement both deductive (theory-driven) and inductive (text-driven) methodologies for literary analysis and historical interpretation.
- Construct complete research proposals, including problem statements, literature reviews, methodologies, and structured chapter outlines, for both historical and literary studies.

3. Course Contents

SEMESTER ONE	
UNIT 1 **Academic Research in Literature and History**	■ **Academic Research in Literature and History:** Process, Skills, and Characteristics ■ Research Integrity and Plagiarism ■ Citing References ■ Understanding MLA 8th Edition ■ Note-Taking Techniques for Academic Research ■ Research Organization Tools ■ Workshops

UNIT 2 **Literary Research Methods**	■ Data Collection in Literary Research ■ Evaluating and Finding Sources in Literary Research ■ Reading a Text from a Critical Approach ■ Approaches to Literary Analysis ■ Workshops
UNIT 3 **Research Proposal Development in Literature**	■ **Research Proposal:** Meaning, Benefits, and Techniques ■ Research Proposal Components ■ Checklist Evaluation ■ Workshops
SEMESTER TWO	
UNIT 4 **Foundations of Historical Research**	■ Definition, Ethics, Process, and Limitations of Historical Research ■ Identification of the Historical Problem ■ Types and Characteristics of Historical Topics
UNIT 5 **Data Collection, Analysis, and the Research Proposal**	■ Gathering Primary and Secondary Sources in Historical Research ■ Evaluating Historical Sources ■ Types of Historical Criticism ■ Historical Data Interpretation ■ Guidelines for Writing the Historical Report ■ Historical Research Methods ■ The Historical Research Proposal ■ Workshops

4. Assessment Distribution

The total course grade is calculated according to the following distribution:



Component	Weight	Description
Continuous assessment	**50%**	
Attendance	15%	Regular class participation and punctuality
Class performance	15%	Active participation in discussions, workshops, and in-class activities
Projects	20%	Research assignments, analysis exercises, and practical applications
Final examination	**50%**	Written examination at the end of the course
Total	**100%**	

Introduction

Research in literature and history serves essential functions: it expands human knowledge, preserves cultural heritage, and deepens our understanding of the complexities of human experience across time and cultures. The development of essential research skills—including information literacy, critical analysis, methodological expertise, digital competency, communication abilities, and ethical awareness—provides scholars with the tools necessary to conduct meaningful inquiry and contribute to their respective fields. As both disciplines continue to evolve with technological advances and changing theoretical perspectives, researchers must remain adaptable while maintaining rigorous standards of evidence-based scholarship.

This course package is designed to guide advanced students through a structured journey that integrates theoretical foundations with hands-on practice. Beginning with an overview of key historiographical and literary theories, participants will cultivate critical reading strategies for primary documents and scholarly texts. Unit One introduces academic research in literature and history, covering research integrity, plagiarism prevention, MLA 8th edition citation, and note-taking techniques. Unit Two, Literary Research Methods, examines data-collection strategies—from close reading and archival exploration to digital humanities tools—and source evaluation. Unit Three, Research Proposal Development, equips students with the skills to formulate problem statements, construct literature reviews, design methodologies, and draft structured proposal outlines. Unit Four, Foundations of Historical Research, delves into the ethics, problem identification, and topics specific to historical inquiry. Unit Five, Data Collection, Analysis, and the Research Proposal, trains students in locating primary and secondary sources, employing external and internal criticism, interpreting documents, and writing rigorous historical reports and proposals. Throughout, the package provides workshops that integrate synthesis techniques, organization tools (source and note cards), and peer-review exercises to prepare students for original research projects. By weaving together historical inquiry and literary critique, the course empowers students to craft innovative research projects that bridge disciplinary boundaries and address contemporary questions about identity, memory, and meaning.

SEMESTER ONE

Literary Research

SEMESTER ONE

Unit One: Academic Research in Literature and History

IN THIS UNIT

- Lesson 01: Introduction to Academic Research
- Lesson 02: Research Integrity and Plagiarism
- Lesson 03: Citing References
- Lesson 04: Understanding MLA 8th Edition
- Lesson 05: Note-Taking Techniques for Academic Research
- Lesson 06: Note-Taking Techniques (Part Two) and Research Organization Tools
- Unit One Workshops

Lesson 01: Introduction to Academic Research

1. What is Academic Research?

Academic research is a systematic, rigorous, and methodical investigation designed to discover new facts, theories, or applications in a scholarly context. In the classic definition given by D. Slesinger and M. Stephenson in the *Encyclopaedia of Social Sciences*, research is "the manipulation of things, concepts or symbols for the purpose of generalising to extend, correct or verify knowledge, whether that knowledge aids in construction of theory or in the practice of an art" (qtd. in Kothari and Garg 1). Kothari and Garg also cite the *Advanced Learner's Dictionary of Current English*, which defines research as "a careful investigation or inquiry specially through search for new facts in any branch of knowledge" (1)—a definition that emphasizes the systematic and structured nature of research. Creswell and Creswell describe research design as encompassing "qualitative, quantitative, and mixed methods approaches" that follow philosophical assumptions and specific strategies of inquiry (22).

2. Fundamental Characteristics of Academic Research

2.1. Systematic and Scientific Approach

Academic research follows established scientific methodology with predetermined procedures that ensure reliability and validity. As outlined by Kumar, the research process involves eight systematic steps: formulating a research problem, conceptualizing a research design, constructing data collection instruments, selecting samples, writing research proposals, collecting data, processing and displaying data, and writing research reports (72).

2.2. Evidence-Based Foundation

All academic research must be thoroughly grounded in existing literature and credible sources. Scholarly books, as defined by the University of Toronto, are "written by scholars for scholars/researchers in the author's field and are typically intended to share research findings and contribute to the ongoing scholarly conversation" (University of Toronto Libraries).

2.3. Peer Review Process

Academic research undergoes rigorous peer review before publication, distinguishing it from non-academic sources. This process ensures that research meets established quality standards and contributes meaningfully to the field.

3. The Role of Research in Literature and History

3.1. Research in Literary Studies

Research plays a foundational role in literary scholarship, serving as the cornerstone for understanding texts within their cultural, historical, and theoretical contexts. According to the University of Central Florida's guide to literary research, "Usually literary research involves a combination of methods such as archival research, discourse analysis, and qualitative research methods" (University of Central Florida). Literary research encompasses multiple dimensions that work together to create comprehensive understanding:

3.1.1. Contextual Analysis: Literary scholars investigate the historical, social, and cultural circumstances surrounding a text's creation and reception. This involves examining the author's biographical details, the political climate of the period, and contemporary literary movements that may have influenced the work.

3.1.2. Theoretical Framework Development: Research in literature requires scholars to engage with various critical theories and methodologies. These may include Marxist literary criticism, which examines material forces like labor and ownership; Critical Race Theory, which investigates intersectionality and structural determinism; or feminist criticism, which analyzes gender dynamics in literary works.

3.1.3. Textual Analysis and Interpretation: The core of literary research involves close reading and systematic analysis of literary texts. Researchers examine language, style, structure, themes, and symbolic elements to develop meaningful interpretations supported by evidence from the text and relevant secondary sources.

3.1.4. Intertextual Studies: Literary research frequently involves comparing texts across different periods, authors, or cultural contexts. This comparative approach helps scholars identify patterns, influences, and evolutionary trends in literary expression.

3.2. Research in Historical Studies

Historical research serves as the systematic investigation of past events, processes, and human experiences to understand how societies, cultures, and individuals have evolved over time. The significance of historical research extends beyond mere documentation of events to encompass critical analysis and interpretation of evidence. The foundation of historical inquiry rests on meticulous examination of primary sources. Chitnis applies the classic definition of research to the discipline of history, describing it as "the manipulation of things, concepts or symbols for the purpose of generalizing to extend, correct or verify knowledge" (78). Such evidence includes archaeological remains, manuscripts, official records, personal correspondence, and other contemporary documents. Historical research proceeds through different steps:

3.2.1. Source Criticism and Verification: Historical researchers must develop expertise in evaluating the authenticity and reliability of sources through external and internal criticism. External criticism examines the physical characteristics and provenance of documents, while internal criticism assesses the credibility and accuracy of the content.

3.2.2. Interpretive Analysis: Beyond source verification, historical research requires synthetic operations aimed at finding connected, meaningful accounts of facts and forces. Researchers must interpret evidence within broader contexts, considering multiple perspectives and potential biases.

4. Essential Research Skills in Literature and History

4.1. Effective Information Gathering: The foundation of successful research lies in the ability to locate, access, and evaluate relevant sources. This encompasses understanding how to navigate academic databases, distinguish between primary and secondary sources, and identify credible scholarly publications. According to Kumar, effective information gathering involves several

systematic steps: formulating clear research questions, identifying appropriate databases and repositories, developing comprehensive search strategies, and maintaining organized records of sources consulted (101).

4.2. Source Evaluation and Critical Assessment: Researchers must develop sophisticated skills for evaluating source credibility, relevance, and potential bias. This includes understanding the peer review process, assessing author credentials, evaluating publication venues, and recognizing potential conflicts of interest.

4.3. Critical Analysis and Synthesis: Academic research requires the ability to examine multiple perspectives, identify patterns, and synthesize information from diverse sources. The Paul-Elder Critical Thinking Framework emphasizes developing systematic approaches to analyzing problems by addressing elements such as purpose, questions, information, interpretation, concepts, assumptions, implications, and point of view.

4.4. Argumentation and Evidence-Based Reasoning: Researchers must learn to construct logical arguments supported by credible evidence. This involves understanding different types of evidence, recognizing logical fallacies, and presenting coherent arguments that address counterarguments and alternative interpretations.

4.5. Research Design and Methodology: Successful researchers develop expertise in selecting appropriate research methods for their specific inquiries. Kothari outlines essential components including problem formulation, literature review, hypothesis development, research design selection, sampling procedures, data collection methods, and analysis techniques.

4.6. Data Collection and Management: Whether working with quantitative data, qualitative interviews, or archival materials, researchers must master systematic approaches to data gathering and organization. This includes developing efficient filing systems, maintaining detailed research logs, and ensuring ethical compliance in data handling.

4.7. Digital Research Tools: Contemporary research increasingly requires proficiency with digital platforms and analytical software. For historians, this includes familiarity with digitized archives, database searching, and Geographic Information Systems (GIS) for spatial analysis.

4.8. Academic Writing Proficiency: Research findings must be communicated through clear, precise, and well-structured academic prose. Academic writing requires mastery of discipline-specific conventions, proper citation practices, logical organization, and engaging presentation of complex ideas. According to the Academic Writing Skills guide, essential elements include: understanding assignment requirements, structuring arguments logically, maintaining appropriate academic tone, integrating sources effectively, and following citation conventions accurately.

4.9. Oral Presentation and Discussion Skills: Researchers frequently present findings at conferences, seminars, and public forums, requiring effective verbal communication abilities. This includes organizing presentations clearly, using visual aids effectively, and engaging in scholarly discussions and debates.

4.10. Research Ethics and Integrity: All academic research must adhere to strict ethical standards regarding intellectual honesty, proper attribution, and respect for human subjects. This includes understanding plagiarism, obtaining necessary permissions for archival research, and following institutional review board procedures when appropriate.

4.11. Project Planning and Execution: Successful research requires systematic planning and efficient time management. This includes setting realistic timelines, breaking large projects into manageable tasks, and maintaining consistent progress toward research goals.

5. The Research Process in Literature and History

Both literary and historical research follow systematic methodological approaches that integrate multiple skill sets. The process typically involves:

5.1. Preliminary Investigation: Researchers begin by exploring existing scholarship to identify gaps, controversies, or areas requiring further investigation. This involves comprehensive literature reviews that map the current state of knowledge and identify opportunities for original contribution.

5.2. Source Location and Access: Depending on the discipline, researchers must locate and gain access to relevant materials. For historians, this often involves archival research and examination of primary documents. Literary scholars may need to access manuscript collections, rare books, or specialized databases.

5.3. Analysis and Interpretation: The core of both literary and historical research involves systematic analysis of evidence using appropriate theoretical frameworks and methodological approaches. This requires integrating multiple skills including critical thinking, source evaluation, and theoretical application.

5.4. Synthesis and Communication: Finally, researchers must synthesize their findings into coherent arguments and communicate results effectively to scholarly audiences. This involves academic writing, presentation skills, and engagement with peer review processes.

Lesson 02: Research Integrity and Plagiarism

1. Defining Plagiarism in Academic Context

Plagiarism in research writing represents the theft of intellectual property and the unethical practice of claiming someone else's work as your own creation. According to the Office of Research Integrity, plagiarism constitutes "theft or misappropriation of intellectual property and the substantial unattributed textual copying of another's work" (Office of Research Integrity). The Committee on Publication Ethics (COPE) states that "plagiarism ranges from the unreferenced use of others' published and unpublished ideas, including research grant applications to submission under 'new' authorship of a complete paper, sometimes in a different language" (Committee on Publication Ethics). Mike Wallace and Alison Wray, in their seminal work *Critical Reading and Writing for Postgraduates*, provide a practical definition: plagiarism involves "using chunks of someone else's text as your own work, passing off others' ideas as your own or failing to acknowledge your sources adequately" (48). This definition encompasses not only direct textual appropriation but also the misattribution of intellectual contributions. Academic integrity serves as the foundation of scholarly discourse, requiring "a commitment, even in the face of adversity, to six fundamental values: honesty, trust, fairness, respect, responsibility, and courage" (International Center for Academic Integrity). When students and researchers engage in plagiarism, they violate these core principles by presenting another person's words, ideas, or images without proper attribution.

2. Types of Plagiarism in Academic Writing

Plagiarism manifests in various sophisticated forms, each presenting unique challenges for detection and prevention. Contemporary scholarship identifies several distinct categories that researchers must understand to maintain academic integrity.

2.1. Direct or Verbatim Plagiarism represents the most egregious form, involving the word-for-word transcription of a section of someone else's work, without attribution and without quotation marks. Direct plagiarism is defined as plagiarism "done with a definite intention to plagiarize; here, the author copy-pastes word-to-word text of other authors' writing to create his/her work without giving credit or using quotation marks" (Sharmah et al. 194). This deliberate plagiarism constitutes academic dishonesty and grounds for severe disciplinary action. For example, copying entire paragraphs from published sources without quotation marks or citations exemplifies this violation.

2.2. Paraphrasing Plagiarism occurs when writers rewrite the original text while retaining the core meaning without providing appropriate attribution. This form often results from inadequate understanding of proper paraphrasing techniques, where authors change only superficial elements while maintaining the original structure and key phrases. Academic institutions consider this "poor scholarship and amounts to plagiarism" even when unintentional. Accordingly, Dhammi and Ul Haq state that "if one rewrites any part/paragraph of manuscript in his/her own words it is called paraphrasing... Just changing words cannot make it the property of borrower; hence, this should be properly referenced. If it is not referenced, it will amount to plagiarism" (582).

2.3. Mosaic or Patchwork Plagiarism stitches together phrases, passages, and ideas borrowed from several sources to produce a seemingly new text. This sophisticated method requires more effort than direct copying but remains easily detectable by plagiarism software. Writers engaging in this practice often slightly rephrase passages while preserving the same basic structure as the original source. Amirzhanov et al. describe mosaic plagiarism as involving "copying phrases, passages, and ideas from different sources and putting them together to create a new text" (50).

2.4. Self-Plagiarism represents a complex category involving reusing work that you've previously submitted or published. It refers to "the full or partial reproduction of an author's previous work in another scientific work by the same author without any acknowledgement thereof" (Rozhkova 47). This violation occurs when authors present previously submitted work as new original research without explicit permission or proper citation. Even reusing one's own phrases or data from previous assignments constitutes academic dishonesty unless properly acknowledged.

2.5. Accidental Plagiarism results from "careless note-taking" and inadequate source management. This unintentional form occurs when researchers "neglect to cite their sources, or misquote their sources, or unintentionally paraphrase a source by using similar words, groups of words, and/or sentence structure without attribution." Despite the lack of intent, academic institutions treat accidental plagiarism with equal seriousness as deliberate violations.

3. Consequences of Plagiarism

The ramifications of plagiarism extend far beyond academic settings, affecting personal, professional, and legal domains. Understanding these consequences emphasizes the critical importance of maintaining academic integrity throughout one's scholarly career.

- **Academic consequences** in educational institutions are severe and far-reaching. Students face "suspension, class or grade failure, ban from extracurriculars, ruined academic reputation, and expulsion." Many institutions maintain permanent records of plagiarism violations, potentially affecting "undergraduate and graduate admissions." Academic professionals risk losing their positions, research funding, and publication opportunities. The academic community operates on trust, and plagiarism violations "seriously damage your reputation" within scholarly circles.
- **Professional ramifications** can devastate entire careers. Professionals discovered plagiarizing may face immediate termination, loss of professional licenses, and permanent damage to their reputation. The consequences follow individuals throughout their careers, making it "harder to find new jobs and advance in your field." High-profile cases demonstrate how plagiarism allegations can force public figures to resign and effectively end meaningful career advancement.
- **Legal implications** emerge when plagiarism involves copyright infringement. In the United States, plagiarism falls under "fraud, intellectual property, and copyright laws." Serious violations can result in criminal charges, including "jail time if it's serious enough to be a misdemeanour or felony." Authors may face substantial fines, particularly when plagiarists profit financially from stolen intellectual property.

- **Institutional impact** extends beyond individual consequences. Educational institutions suffer reputational damage when plagiarism becomes widespread, potentially affecting accreditation and the value of degrees awarded. Research integrity violations undermine public trust in academic institutions and scholarly research.

4. Manifestations and Examples of Plagiarism

Understanding how plagiarism appears in academic writing helps researchers recognize and avoid these violations. Contemporary examples illustrate the various forms plagiarism takes in scholarly work.

- **Direct quotation violations** occur when authors incorporate source material without proper attribution. Consider the following sentence from Trenholm et al.: "Feedback practices are varied and complex" (1197). If a student wrote: "Feedback practices are varied and complex" without crediting Trenholm et al., this constitutes plagiarism. The proper attribution should read: "Feedback practices are varied and complex" (Trenholm et al. 1197).
- **Inadequate paraphrasing** represents another common violation that occurs when a writer changes a few words or phrases from the original text while keeping the overall structure and meaning intact without providing proper attribution. For example, in *A People's History of the United States*, Howard Zinn writes: "The history of any country, presented as the history of a family, conceals fierce conflicts of interest (sometimes exploding, most often repressed) between conquerors and conquered, masters and slaves, capitalists and workers, dominators and dominated in race and sex" (10). An inadequate paraphrase might read: "A country's history, told as the story of one family, hides intense conflicts of interest between conquerors and the conquered, masters and slaves, and capitalists and workers." This version keeps Zinn's structure and much of his wording, and it does not cite him. An acceptable paraphrase would be: Zinn argues that national histories which portray a country as a single, harmonious family hide the deep and often suppressed struggles between dominant and subordinate groups (10). This example highlights that beyond just changing words, proper paraphrasing requires expressing ideas in original language accompanied by accurate citation to give credit to the original author.
- **Structural plagiarism** involves using the organizational framework or key points from another person's work as a scaffold for your own writing without acknowledging that source. For example, if a student writes a history paper that follows the exact chapter sequence, arguments, and section divisions of a published scholar's work but rewrites the text in different words without citing the original author, this constitutes structural plagiarism. Despite changing the wording, the unacknowledged borrowing of the structure and main ideas is still plagiarism because the intellectual framework belongs to the original author. Proper academic practice requires both acknowledgment of the source and ideally original restructuring or critical engagement with the framework used.

5. Prevention Strategies for Academic Integrity

Effective plagiarism prevention requires systematic approaches to research, note-taking, and writing that support academic integrity throughout the scholarly process.

- Researchers must "keep thorough notes" that "clearly distinguish between your ideas and the ideas of others." Digital tools and organized note-taking systems help prevent confusion between original thoughts and borrowed material. The practice of maintaining "detailed notes of any resources used" ensures proper attribution during the writing process.
- The "best way to avoid plagiarizing is to understand and re-state the information you gather as you are gathering it." Researchers should "use your own words" during note-taking, processing information cognitively before recording it. When direct quotation becomes necessary, notes must include clear "quotation marks at the beginning and ending of the quoted section" with appropriate highlighting or marking systems.
- **Citation integration** requires incorporating "in-text citations into your notes as you are taking them." Each paraphrased section should conclude with sufficient author information for identification, such as "(Smith 45)." For direct quotations, page numbers must be included to support proper citation formatting.
- Researchers should "write down the full details of every source you consult," including books and journal articles, but also things like websites, magazine articles, and videos. This systematic approach prevents the common problem of forgotten sources and enables accurate citation.
- **Technology-assisted prevention** includes using plagiarism detection software before submission. These tools "scan your document, compare it to a database of webpages and publications, and highlight passages that appear similar to other texts." However, technology should complement, not replace, fundamental understanding of academic integrity principles.

Lesson 03: Citing References

When writing an academic paper – whether a project report, dissertation, or thesis – it is essential to document the sources of information and ideas used in your work. Proper citation not only acknowledges intellectual debts but also allows readers to trace the origin of your research material. As Hart explains, referencing is part of the "scholarly conversation" that shows how your work is situated within a wider academic field (37). The expected referencing method will depend on departmental regulations or recommendations from your supervisor.

1. Why You Need to Cite Your Sources

Academic convention requires citation in order to:

- **Acknowledge intellectual property:** By citing sources, you make clear when you have borrowed, discussed, or contested ideas from other scholars (Neville 21). Even disagreement relies on recognition of the original thinker.
- **Demonstrate academic integrity:** Proper referencing helps avoid plagiarism and shows respect for academic ethics (Pears and Shields 40).
- **Support argumentation:** References provide evidence for your claims, allowing readers to assess how you built your ideas and what influenced your reasoning (Machi and McEvoy 30).
- **Show scholarly range:** Accurate citation demonstrates the range and relevance of your research engagement, giving assessors a clearer view of your preparation.
- **Enable traceability:** References allow readers and supervisors to consult the sources directly if they want to verify a claim or deepen their understanding.

2. Using Information Within Your Text

There are three common ways to incorporate others' work into your own: footnotes/endnotes, quotations, and paraphrasing or summarizing.

2.1. Footnotes and Endnotes

In some disciplines, particularly in the humanities, footnotes and endnotes are used to provide full bibliographic details of sources (Turabian 30). In other cases, they serve to add background commentary or expand on points without cluttering the main text. Footnotes typically appear at the bottom of the page, while endnotes are compiled in numerical order at the end of the document.

2.2. Quotations in Text

For short quotations, enclose the exact words in quotation marks within your sentence. Longer quotations—more than four lines of prose in MLA style, 40 words or more in APA style, and more than 100 words in Chicago style—should be set off from the main text as indented block quotations (*MLA Handbook*; Turabian). Omissions are indicated by an ellipsis (. . .), and any words you add or change are placed in square brackets. All quotations must be attributed to their source, with appropriate citation style.

2.3. Summarizing and Paraphrasing

Paraphrasing involves re-expressing a source's idea in your own words and sentence structure while maintaining the original meaning. Summarizing compresses the main ideas of a text into a shorter form. Both require proper citation. As Bailey emphasizes, paraphrasing demonstrates comprehension of the source material and analytical engagement, rather than simple repetition (31).

3. How to Cite a Source in the Text

There are two main ways of citing within the text:

3.1. Information-Prominent Citation: The emphasis is on the idea, and the author's name follows in citation form.

Example: Children express an interest in books and pictures from an early age (Murphy 62).

3.2. Author-Prominent Citation: The author's name is incorporated into the sentence, often through reporting verbs such as claims, argues, or suggests.

Example: Murphy claimed that children as young as six months are able to follow a simple story sequence (62).

4. Reporting Verbs

Reporting verbs reflect your interpretation of the source's stance. Hyland shows that writers use reporting verbs to signal their stance toward the work they cite: verbs such as *demonstrate* or *show* are stronger than neutral verbs such as *state* or *report* (*Academic Discourse*). The choice of verb subtly communicates whether you endorse, critique, or remain neutral toward the source. Examples include: argue, assert, explain, demonstrate, contend, suggest, warn.

Lesson 04: Understanding MLA 8th Edition

The Modern Language Association (MLA) style underwent significant changes with its 8th edition, published in April 2016. This lesson focuses on the essential principles, practical applications, and formatting requirements that students need to master for effective academic writing.

> ℹ️ **A note on editions**
>
> The MLA Handbook was updated to a 9th edition in 2021. The 9th edition keeps the core-elements model taught here and mainly adds guidance (for example, on inclusive language and on annotated bibliographies). Everything in this lesson remains valid; check with your supervisor which edition your department requires.

1. The Philosophy Behind MLA 8th Edition

The 8th edition represents a shift from format-specific citation rules to a universal, principle-based approach. Rather than memorizing different formats for books, articles, and websites, writers now apply the same set of principles to every source type. Citation systems must adapt to an evolving information landscape while maintaining scholarly integrity (Walker and Taylor), and documentation serves communicative as well as organizational purposes: citations help readers trace scholarly conversations and evaluate the quality of the evidence (Hyland, *Academic Discourse*).

2. MLA 8th Edition Page Layout and Formatting

2.1. Paper and Margins

- Use standard white 8½ × 11-inch paper (A4 is acceptable where it is the local standard).
- Set 1-inch margins on all sides (top, bottom, left, and right).
- Left-align all text except titles and headers.

2.2. Font and Spacing

- Use 12-point Times New Roman or another easily readable serif font.
- Ensure that italics are clearly distinguishable from regular text.
- Apply double spacing throughout the entire paper, including the Works Cited page.
- Leave only one space after periods and other punctuation marks.

2.3. Paragraph Formatting

- Indent the first line of each paragraph 0.5 inches from the left margin.
- Use the Tab key to ensure uniform indentation.
- For block quotations (more than four lines of prose), indent the entire quotation 0.5 inches from the left margin and omit the quotation marks.

2.4. MLA Header Format

The MLA header (also called a running head) appears in the upper right-hand corner of every page and contains your last name followed by the page number.

- **Position:** upper right-hand corner, 0.5 inches from the top edge
- **Format:** last name + space + page number (no punctuation between them)
- **Font:** the same as the document text (Times New Roman, 12-point)
- **Alignment:** right-aligned
- **Continuity:** the header continues sequentially through the Works Cited page

3. Core Elements: The Universal Framework

The MLA 8th edition organizes every citation around nine core elements, given in this order:

1	Author.
2	Title of source.
3	Title of container,
4	Other contributors,
5	Version,
6	Number,
7	Publisher,
8	Publication date,
9	Location.

Each element is followed by the punctuation mark shown above: a period after the author and the title of the source, and commas after the elements that belong to the container, with a period closing the entry. This systematic approach reflects the genre conventions that make academic writing recognizable and functional within scholarly communities (Swales).

> **Example**
>
> Goodwin, Doris Kearns. *Team of Rivals: The Political Genius of Abraham Lincoln.* Simon & Schuster, 2005.

4. Key Changes from MLA 7th Edition

Previous editions required writers to identify the source type first and then apply a specific formatting rule for that type. The 8th edition removes this complexity by using one standard pattern for all sources, which helps writers focus on how they use their sources rather than on mechanical formatting differences (see also Bizup).

4.1. The Container Concept

The *container* is any larger work that holds your source. For example:

- A journal article's container is the journal.
- A television episode's container is the series; if you watched it on Netflix, Netflix is a second container.
- An article on a website has the website as its container.

This concept reflects the realities of digital media, in which a source often exists in several containers at once.

4.2. URLs

The MLA 8th edition recommends including URLs (without *http://* or *https://*) or, preferably, DOIs for online sources. Even a URL that later changes leaves a useful research trail for the reader.

4.3. Publisher Simplification

The 8th edition drops the city of publication for most sources and omits the publisher when it is essentially the same as the name of the website. Abbreviations such as *U* and *P* (for "University" and "Press") are still used in the Works Cited list (e.g., *Oxford UP*).

4.4. In-Text Citations: Connecting Ideas to Sources

In-text citations use the author-page format—(Author Page)—with no comma between the name and the page number. This brief reference points readers to the full entry in the Works Cited list while keeping the argument readable.

Source type	In-text citation
One author	(Rowling 22)
Two authors	(Johnson and Selleck 44)
Three or more authors	(Chan et al. 134)
No author	Shortened title: (*Tree Grows*)
Corporate author	(American Lung Association 14)

4.5. Digital Source Considerations

For e-books whose pagination varies across devices, cite a chapter or section number instead of a page number: (Rowling, ch. 1). This acknowledges that digital texts do not always share the fixed page structure of print (cf. Hayles).

5. The Works Cited List

The Works Cited page provides complete information for every source cited in the text, arranged alphabetically by the author's last name. A well-prepared list serves two purposes: it allows readers to verify your sources, and it demonstrates the scope of your research.

- **Hanging indentation:** the second and subsequent lines of each entry are indented 0.5 inches.
- **Title styling:** italics for independent (self-contained) works; quotation marks for works contained in larger works.
- **Multiple works by the same author:** replace the author's name with three hyphens (---) in the second and subsequent entries.

5.1. Common Source Examples

Book

Author's Last Name, First Name. *Title of Book*. Publisher, Year.

Example: Roth, Veronica. *Divergent.* Katherine Tegen Books, 2011.

Article on a Website

Author's Last Name, First Name. "Title of Article." *Website Name*, Publisher, Day Month Year, URL.

Example: White, Lori. "The Newest Fad in People Helping People: Little Free Pantries." *Upworthy,* Cloud Tiger Media, 3 Aug. 2016, www.upworthy.com/the-newest-fad-in-people-helping-people-little-free-pantries.

Journal Article

Author's Last Name, First Name. "Title of Article." *Journal Name*, vol. #, no. #, Year, pp. ##–##.

Example: DelGuidice, Margaux. "When a Leadership Opportunity Knocks, Answer!" *Library Media Connection,* vol. 30, no. 2, 2011, pp. 48–49.

Chapter in an Edited Book

Chapter Author's Last Name, First Name. "Chapter Title." *Book Title*, edited by Editor's First Name Last Name, Publisher, Year, pp. ##–##.

Example: Montrose, Louis. "Elizabeth Through the Looking Glass: Picturing the Queen's Two Bodies." *The Body of the Queen: Gender and Rule in the Courtly World, 1500–2000,* edited by Regina Schulte, Berghahn, 2006, pp. 61–87.

Lesson 05: Note-Taking Techniques for Academic Research

Effective note-taking serves as the foundation of successful research in English literature, functioning as a systematic approach to collecting, organizing, and retaining valuable information from scholarly sources. Note-taking creates a structured pathway through the landscape of research, preventing information overload while encouraging critical engagement with academic material (McPherson 15). Well-organized notes facilitate efficient information retrieval during the writing process and enhance comprehension of complex literary concepts (Pauk 45).

1. Importance of Effective Note-Taking

Note-taking provides several crucial functions within the academic research process. The practice helps maintain organizational structure, preventing the overwhelming accumulation of unmanaged information that can hinder research productivity (McPherson 23). Through the process of summarizing information in one's own words, researchers develop deeper understanding of source material while strengthening their analytical capabilities (Pauk 67). The systematic documentation of sources and ideas creates an accessible repository of knowledge that supports the development of scholarly arguments and facilitates cross-referential analysis across multiple texts.

2. Summarizing

Summarizing involves creating concise representations of main ideas, arguments, or concepts from source material. This technique proves particularly valuable when working with lengthy literary analyses, theoretical texts, or comprehensive critical studies (McPherson 78).

2.1. When to Use: Employ summarization when encountering extensive chapters, articles, or sections that require distillation of key arguments or concepts. This approach provides quick overviews of source material while maintaining focus on essential information.

2.2. Steps for Effective Summarizing

- Engage systematically with source material, highlighting or underlining key sentences and passages that encapsulate primary ideas and central arguments.
- After reviewing each section or paragraph, determine the most critical points or arguments presented by the author.
- Create concise summaries using your own terminology to express the author's ideas, avoiding verbatim copying while demonstrating comprehension of the material.
- Keep summaries brief while ensuring they remain informative, focusing on clarity and simplicity while capturing essential elements of the source.

2.3. Example of Academic Summarizing

When examining Eagleton's discussion of structuralism, active reading reveals key concepts such as "sign," "signifier," and "signified," along with references to Ferdinand de Saussure's foundational work (Eagleton 112). The identification of core elements shows that Eagleton presents structuralism as a method focusing on underlying textual structures rather than content, grounded in Saussure's

linguistic theory that views signs as comprising both signifier and signified components. The paraphrased summary demonstrates that structuralism represents a significant analytical shift, emphasizing how meaning emerges from relationships and differences between signs within systematic frameworks rather than from direct reference to external reality (Eagleton 114).

3. Paraphrasing

Paraphrasing involves restating information in original language while preserving the source's intended meaning. This technique enables smooth integration of source material into academic writing while simplifying complex theoretical concepts (McPherson 45).

3.1. When to Use: Apply paraphrasing when integrating source material into your own writing or when simplifying intricate ideas for better comprehension. Paraphrasing maintains conceptual accuracy while allowing for stylistic adaptation.

3.2. Steps for Effective Paraphrasing

- Ensure thorough comprehension of the intended content through multiple readings if necessary.
- Divide source material into smaller, manageable segments for individual paraphrasing.
- Express each segment using your own vocabulary and sentence structure while maintaining the original meaning and conceptual accuracy.
- Compare your paraphrased version with the original to ensure precision and avoid unintentional plagiarism.
- Provide appropriate citation for paraphrased content following MLA guidelines.

3.3. Example of Academic Paraphrasing

Original Passage from Eagleton: "The structuralist emphasis on the 'constructedness' of human meaning represented a major advance. Meaning was neither a private experience nor a divinely ordained occurrence: it was the product of certain shared systems of signification" (Eagleton 84).

Paraphrased Version: Structuralism brought about significant progress by asserting that meaning results from constructed systems rather than individual experience or divine intervention. According to this perspective, meaning emerges through collective signification systems that operate within communities rather than through personal or transcendent sources (Eagleton 84).

4. Direct Quotation

Direct quotation preserves the exact wording of source material when the author's specific language, style, or phrasing carries particular significance for your analysis (Pauk 89).

4.1. When to Use: Employ direct quotation when the author's precise language is unique, powerful, or when preserving the original style, word choice, and tone is essential for your argument.

4.2. Guidelines for Effective Quotation

- Choose passages that directly support your analytical points, focusing on content that contains key themes, literary devices, or significant interpretive insights.
- Provide clear context for quotations, identifying the author, source, and situational framework within the text.
- Use introductory phrases to integrate quotations seamlessly into your writing, such as "According to [Author]" or "[Author] argues that."
- Interpret and analyze quoted material in your own words, explaining how the quotation relates to your argument or thesis.
- Use shorter quotations when possible, reserving longer passages for cases where extended context is necessary for understanding.

4.3. Example of Effective Quotation Usage

Gatsby's relationship with time reveals his fundamental disconnection from reality, as evidenced by his incredulous reply to Nick: "Can't repeat the past? . . . Why of course you can!" (Fitzgerald 110). This statement demonstrates Gatsby's naive confidence in his ability to recapture previous experiences, reflecting his inability to accept temporal progression and change, ultimately contributing to his tragic downfall.

Lesson 06: Note-Taking Techniques (Part Two) and Research Organization Tools

1. Synthesis

Synthesis combines information from multiple sources to create comprehensive understanding of concepts, ideas, or arguments. Unlike summarizing or paraphrasing single sources, synthesis requires identifying connections, patterns, and relationships across different texts to form unified explanations (McPherson 134).

1.1. Benefits of Synthesizing

- Develops a richer, more nuanced understanding through multi-source integration
- Condenses large amounts of information into manageable, interconnected concepts
- Encourages active engagement with material through relationship identification and insight development

1.2. Key Considerations for Academic Synthesis

- Gather information from various texts, perspectives, or sections to develop comprehensive understanding of topics.
- Identify recurring themes, arguments, or concepts that emerge across different sources.
- Examine similarities and differences between sources, noting areas of agreement and divergence.
- Combine insights from multiple sources into cohesive narratives using your own analytical framework.
- Link synthesized ideas to your own research questions and thesis development.

1.3. Example of Academic Synthesis

Structuralist theories present a unified perspective on meaning as systematically constructed rather than individually created. Saussure establishes the foundation by conceptualizing language as a system of signs where meaning emerges from relationships between signifiers and signified elements rather than direct object correlation (Saussure 67). **Building upon this framework,** Eagleton argues that cultural and linguistic systems precede individual consciousness, positioning people as products of these systems rather than independent meaning creators (Eagleton 84).

Barthes extends these concepts into broader cultural analysis, applying structuralist principles to media, fashion, and textual interpretation, challenging traditional notions of authorial authority in meaning production (Barthes 145). *Collectively, these theorists emphasize the systematic construction of meaning within larger linguistic and cultural frameworks.*

2. Research Organization Tools

2.1. Source Cards

Source cards maintain bibliographic information for all consulted sources, ensuring proper citation and facilitating easy reference during bibliography compilation. These cards should include complete publication details formatted according to MLA guidelines.

Example Source Card

Author	Eagleton, Terry
Title	*Literary Theory: An Introduction*
Edition	2nd ed.
Publisher	University of Minnesota Press
Year of publication	1996
Relevant pages	84–115
MLA entry	Eagleton, Terry. *Literary Theory: An Introduction.* 2nd ed., U of Minnesota P, 1996.

2.2. Note Cards

Note cards record specific information, quotations, paraphrased content, or summaries from sources, facilitating organization and preventing plagiarism while simplifying evidence incorporation into research papers.

Example Note Card

Heading	Eagleton, *Literary Theory*, p. 84
Content	Structuralism stresses that meaning is constructed through shared systems of signification rather than arising from individual experience or divine sources.
Type	Paraphrase (no quotation marks, because the wording is your own)
Relevance	Theoretical foundation for the analysis

Unit One Workshops

Task 01

Read the following excerpts.

> **Excerpt A — Edward W. Said, *Orientalism* (1978), pp. 1–3**
>
> The Orient was almost a European invention, and had been since antiquity a place of romance, exotic beings, haunting memories and landscapes, remarkable experiences. [...] The Orient is an integral part of European material civilization and culture. [...] Orientalism [is] a Western style for dominating, restructuring, and having authority over the Orient.

> **Excerpt B — Michel Foucault, *The History of Sexuality, Volume 1: An Introduction* (1976; trans. 1978), p. 93**
>
> Power is everywhere; not because it embraces everything, but because it comes from everywhere. [...] [P]ower is not an institution, and not a structure; neither is it a certain strength we are endowed with; it is the name that one attributes to a complex strategical situation in a particular society.

> **Excerpt C — Frantz Fanon, *Black Skin, White Masks* (1952; trans. 1967), pp. 9, 110–11**
>
> The black man wants to be white. The white man slaves to reach a human level. [...] In the white world the man of color encounters difficulties in the development of his bodily schema. Consciousness of the body is solely a negating activity.

Question. Write a paragraph (5–7 sentences) responding to the following question: *How do postcolonial theorists conceptualize the relationship between identity and power?*

1. Start with a **topic sentence** summarizing the overall idea.
2. Use evidence or paraphrase from **at least two sources**.
3. Show how the ideas are connected or contrasted.
4. Include **your own interpretation**.

Task 02

Analyze the following excerpts from Thomas Pynchon's *The Crying of Lot 49* (1966) using note cards, applying paraphrase, quotation (both short and long), and summary. Organize your note cards by themes, key arguments, and textual evidence to keep your analysis clear and focused. Draw connections between Pynchon's narrative and Fredric Jameson's *Postmodernism, or, The Cultural Logic of Late Capitalism* (1991) and Jean Baudrillard's "The Precession of Simulacra" (1981; in *Simulacra and Simulation*). Summarize the main arguments of both works on separate cards, paraphrase relevant passages, include short quotations to support your analysis, and integrate one

long quotation, relating all of them to the themes of capitalism, simulation, and postmodernism in Pynchon's novel. Use correct MLA citation throughout.

Excerpt 1

"But you still don't know," Metzger said. "You haven't seen it." Into the commercial break now roared a deafening ad for Beaconsfield Cigarettes, whose attractiveness lay in their filter's use of bone charcoal, the very best kind. "Bones of what?" wondered Oedipa.

"Inverarity knew. He owned 51% of the filter process."

"Tell me."

"Someday. Right now it's your last chance to place your bet. Are they going to get out of it, or not?"

She felt drunk. It occurred to her, for no reason, that the plucky trio might not get out after all. She had no way to tell how long the movie had to run. She looked at her watch, but it had stopped. "This is absurd," she said, "of course they'll get out."

Excerpt 2

"But our beauty lies," explained Metzger, "in this extended capacity for convolution. A lawyer in a courtroom, in front of any jury, becomes an actor, right? Raymond Burr is an actor, impersonating a lawyer, who in front of a jury becomes an actor. Me, I'm a former actor who became a lawyer. They've done the pilot film of a TV series, in fact, based loosely on my career, starring my friend Manny Di Presso, a one-time lawyer who quit his firm to become an actor. Who in this pilot plays me, an actor become a lawyer reverting periodically to being an actor."

Excerpt 3

She thought of a hotel room in Mazatlán whose door had just been slammed, it seemed forever, waking up two hundred birds down in the lobby; a sunrise over the library slope at Cornell University that nobody out on it had seen because the slope faces west; a dry, disconsolate tune from the fourth movement of the Bartók Concerto for Orchestra; a whitewashed bust of Jay Gould that Pierce kept over the bed on a shelf so narrow for it she'd always had the hovering fear it would someday topple on them. Was that how he'd died, she wondered, among dreams, crushed by the only ikon in the house? That only made her laugh, out loud and helpless . . .

Excerpt 4

Yet at least he had believed in the cars. Maybe to excess: how could he not, seeing people poorer than him come in, Negro, Mexican, cracker, a parade seven days a week, bringing the most godawful of trade-ins: motorized, metal extensions of themselves, of their families and what their whole lives must be like, out there so naked for anybody, a stranger like himself, to look at, frame cockeyed, rusty underneath, fender repainted in a shade just off enough to depress the value, if not Mucho himself, inside smelling hopelessly of children, supermarket booze, two, sometimes three generations of cigarette smokers, or only of dust—and when the cars were swept out you had to look at the actual residue of these lives, and there was no way of telling what things had been truly refused (when so little he supposed came by that out of fear most of it had to be taken and kept) and what had simply (perhaps tragically) been lost: clipped coupons promising savings of 5 or 10¢, trading stamps, pink flyers advertising specials at the markets, butts, tooth-shy combs, help-wanted ads, Yellow Pages torn from the phone book, rags of old underwear or dresses that already were period costumes, for wiping your own breath off the inside of a windshield with so you could see whatever it was, a movie, a woman or car you coveted, a cop who might pull you over just for drill, all the bits and pieces coated uniformly, like a salad of despair, in a gray dressing of ash, condensed exhaust, dust, body wastes—it made him sick to look, but he had to look. If it had been an outright junkyard, probably he could have stuck things out, made a career: the violence that had caused each wreck being infrequent enough, far enough away from him, to be miraculous, as each death, up till the moment of our own, is miraculous. [...] Even if enough exposure to the unvarying gray sickness had somehow managed to immunize him, he could still never accept the way each owner, each shadow, filed in only to exchange a dented, malfunctioning version of himself for another, just as futureless, automotive projection of somebody else's life. As if it were the most natural thing. To Mucho it was horrible. Endless, convoluted incest.

Task 03

Read the following passages critically. Then analyze Conrad's passage in relation to the critical perspectives offered by Spivak and de Beauvoir. Finally, synthesize the three texts (Conrad, Spivak, and de Beauvoir), incorporating brief quotations from each to support your analysis.

Passage 1 — Joseph Conrad, *Heart of Darkness*

It's queer how out of touch with truth women are. They live in a world of their own, and there had never been anything like it, and never can be. It is too beautiful altogether, and if they were to set it up it would go to pieces before the first sunset. Some confounded fact we men have been living contentedly with ever since the day of creation would start up and knock the whole thing over. (Conrad 128)

Passage 2 — Gayatri Chakravorty Spivak, "Can the Subaltern Speak?"

[F]or the "figure" of woman, the relationship between woman and silence can be plotted by women themselves; race and class differences are subsumed under that charge. Subaltern historiography must confront the impossibility of such gestures. The narrow epistemic violence of imperialism gives us an imperfect allegory of the general violence that is the possibility of an episteme. Within the effaced itinerary of the subaltern subject, the track of sexual difference is doubly effaced. The question is not of female participation in insurgency, or the ground rules of the sexual division of labor, for both of which there is "evidence." It is, rather, that, both as object of colonialist historiography and as subject of insurgency, the ideological construction of gender keeps the male dominant. If, in the context of colonial production, the subaltern has no history and cannot speak, the subaltern as female is even more deeply in shadow. (Spivak 287)

Passage 3 — Simone de Beauvoir, *The Second Sex*

Now, woman has always been man's dependant, if not his slave; the two sexes have never shared the world in equality. And even today woman is heavily handicapped, though her situation is beginning to change. Almost nowhere is her legal status the same as man's, and frequently it is much to her disadvantage. In the economic sphere men and women can almost be said to make up two castes; other things being equal, the former hold the better jobs, get higher wages, and have more opportunity for success than their new competitors. In industry and politics men have a great many more positions and they monopolize the most important posts. In addition to all this, they enjoy a traditional prestige that the education of children tends in every way to support, for the present enshrines the past—and in the past all history has been made by men. At the present time, when women are beginning to take part in the affairs of the world, it is still a world that belongs to men—they have no doubt of it at all and women have scarcely any. To decline to be the Other, to refuse to be a party to the deal—this would be for women to renounce all the advantages conferred upon them by their alliance with the superior caste. (de Beauvoir 4–5)

Task 04

Read the following passages critically, and then analyze Conrad's passage in relation to Edward Said's and Chinua Achebe's criticism, using one of the note-taking techniques discussed in class.

Passage 1 — Edward W. Said, *Orientalism*

The Oriental is irrational, depraved (fallen), childlike, "different"; thus the European is rational, virtuous, mature, "normal." But the way of enlivening the relationship was everywhere to stress the fact that the Oriental lived in a different but thoroughly organized world of his own, a world with its own national, cultural, and epistemological boundaries and principles of internal coherence. Yet what gave the Oriental's world its intelligibility and identity was not the result of his own efforts but rather the whole complex series of knowledgeable manipulations by which the Orient was identified by the West. (Said 40)

Passage 2 — Chinua Achebe, "An Image of Africa: Racism in Conrad's *Heart of Darkness*"

Which is partly the point. Africa as setting and backdrop which eliminates the African as human factor. Africa as a metaphysical battlefield devoid of all recognizable humanity, into which the wandering European enters at his peril. Can nobody see the preposterous and perverse arrogance in thus reducing Africa to the role of props for the break-up of one petty European mind? But that is not even the point. The real question is the dehumanization of Africa and Africans which this age-long attitude has fostered and continues to foster in the world. And the question is whether a novel which celebrates this dehumanization, which depersonalizes a portion of the human race, can be called a great work of art. My answer is: No, it cannot. (Achebe 1785)

Passage 3 — Joseph Conrad, *Heart of Darkness*

I could see every rib, the joints of their limbs were like knots in a rope; each had an iron collar on his neck, and all were connected together with a chain whose bights swung between them, rhythmically clinking. [...] All their meagre breasts panted together, the violently dilated nostrils quivered, the eyes stared stonily uphill. They passed me within six inches, without a glance, with that complete, deathlike indifference of unhappy savages. [...] [B]lack figures strolled about listlessly, pouring water on the glow, whence proceeded a sound of hissing; steam ascended in the moonlight, the beaten nigger groaned somewhere. "What a row the brute makes!" (Conrad 33–45)

Task 05

Summarize Frantz Fanon's "The Fact of Blackness" (chapter 5 of *Black Skin, White Masks*). Then paraphrase the first three paragraphs of the same text.

Task 06

The following passage is taken from Said's *Orientalism*:

Edward W. Said, *Orientalism*, pp. 1–2

The Orient was almost a European invention, and had been since antiquity a place of romance, exotic beings, haunting memories and landscapes, remarkable experiences. Now it was disappearing; in a sense it had happened, its time was over. [...] The Orient is an integral part of European material civilization and culture. (Said 1–2)

1. Shorten this passage using ellipses and/or brackets.
2. Integrate the trimmed quotation into a short paragraph on how literature reinforces colonial ideology.
3. Use the quotation from *Orientalism* to support your analysis of the following passage from Conrad's *Heart of Darkness*: "The conquest of the earth, which mostly means the taking it away from those who have a different complexion or slightly flatter noses than ourselves, is

not a pretty thing when you look into it too much. What redeems it is the idea only" (Conrad 7).

SEMESTER ONE

Unit Two: Literary Research Methods

IN THIS UNIT

- Lesson 01: Data Collection in Literary Research
- Lesson 02: Evaluating and Finding Sources in Literary Research
- Lesson 03: Reading a Text from a Critical Approach
- Lesson 04: Approaches to Literary Analysis
- Unit Two Workshops

Lesson 01: Data Collection in Literary Research

Data collection in literary research refers to the systematic gathering of relevant materials, textual evidence, and interpretative resources to support close reading, critical analysis, and theoretical engagement with a text. While the dominant material in literary studies remains the written text itself, the approaches to data collection vary depending on the objectives of the investigation and the nature of the literary method being employed (Creswell and Creswell 42; Dawson 14).

1. Textual Analysis

The primary method of data collection in literary studies is textual analysis, which involves a careful and systematic reading of the text to extract elements such as theme, character construction, narrative voice, imagery, symbolism, and linguistic devices. Textual analysis is grounded in the idea that meaning is embedded in formal structures and rhetorical strategies, which the researcher deciphers through textual evidence (Barry 35). For example, analyzing the motif of "silence" in Toni Morrison's *Beloved* provides data for understanding character trauma as well as the dynamics of memory and historiography in African American literature (Mbalia 88).

2. Close Reading

A more concentrated form of textual analysis is close reading, a method rooted in New Criticism that focuses on detailed attention to specific passages. This data collection approach highlights subtle aspects of language such as irony, ambiguity, metaphor, and rhythm (Richards 15). As Porter argues, close reading enables scholars to gather micro-level textual evidence—such as a repeated turn of phrase—that supports broader interpretations of cultural or ideological meaning (17). For instance, DeLillo's condensed prose in *The Body Artist* invites close attention to recurring verbal gestures, which serve as narrative data signaling fragmentation of subjectivity (Cowart 40).

3. Literary Reviews and Criticism

Another important form of data collection is the surveying of published literary reviews and critical responses. Researchers assemble a body of secondary criticism to gauge the reception history of a work and to integrate scholarly debates into their arguments (Eagleton 87). This "meta-critical" dimension brings to light not only the internal textual dynamics, but also how the text has been interpreted across time and disciplines. For example, the shifting critical perception of *Moby-Dick* from its initial dismissal to its canonization provides data about literary reputation and evolving cultural standards (Buell 22).

4. Historical and Cultural Context

Historical and cultural data collection situates the text within wider sociopolitical frameworks. According to Greenblatt, literary works participate in a wider circulation of "social energy" that encompasses social practices, ideology, and historical change (*Shakespearean Negotiations* 6). Gathering materials on the era—such as political movements, economic structures, or cultural anxieties—enriches the interpretive process. For instance, reading DeLillo's *Libra* alongside declassified Cold War documents connects narrative fiction to documentary history (Keesey 289).

5. Author Biography and Letters

Biographical and archival sources offer crucial data for contextualizing an author's creative output. While biographical criticism remains controversial when it reduces the text to mere personal experience, letters, autobiographies, and interviews reveal insights into authorial motivation and thematic resonance (Ellmann 250). For instance, Virginia Woolf's diaries illuminate her focus on gender constraints and artistic autonomy in *A Room of One's Own* (Marcus 112).

6. Secondary Sources and Reference Works

Engagement with secondary sources, such as scholarly essays, handbooks, and reference histories, is a key method of data gathering. These materials present established theoretical frameworks and criticisms that help to refine any textual interpretation (Abrams and Harpham 201). For example, applying Lefebvre's *The Production of Space* provides a spatial-theoretical lens for analyzing representations of the urban in postmodern fiction (Soja 35).

7. Surveys and Interviews

Although less common in strictly textual criticism, qualitative methods such as surveys and interviews are increasingly employed in reception studies and pedagogy-focused research. Collecting reader-response data can reveal the impact of a work on different audiences and aligns with Fish's emphasis on the constitutive role of interpretive communities (Fish 172; Ryan 75).

8. Digital Archives and Databases

Contemporary literary research often turns to digital archives and databases, which allow access to digitized texts, manuscripts, and critical commentary. Large resources such as JSTOR support systematic data collection, while archives like the Walt Whitman Archive offer textual variants and primary documents essential for historical and philological inquiry (Price 125). Such tools also facilitate "distant reading" approaches that draw interpretive data from large textual corpora (Moretti 53).

Lesson 02: Evaluating and Finding Sources in Literary Research

Effective literary research depends on locating and evaluating credible and relevant sources. This process involves understanding where to find valuable materials and how to critically assess their scholarly worth.

1. Where to Find Sources for Literary Research

Books serve as foundational sources in literary scholarship. Monographs, which focus in-depth on specific literary topics, themes, or authors, are widely used by scholars for comprehensive analysis (Barry 57). For example, a monograph examining *The Great Gatsby*'s treatment of the American Dream provides detailed thematic interpretation. Critical editions, such as Norton Critical Editions, include the primary texts alongside annotations and scholarly essays, offering a dual resource for textual analysis and critical context (Abrams and Harpham 89). Anthologies compile essays from different authors related to literary periods or movements, while reference books like *The Oxford Companion to English Literature* provide authoritative definitions and summaries helpful for foundational understanding (*Oxford Companion* 102).

Journal Articles are essential for accessing current scholarly debates. Peer-reviewed articles, vetted rigorously by experts, are critical for credible engagement with literary studies (Eagleton 67). Databases such as JSTOR and Project MUSE provide extensive access to humanities journals, including contemporary literary analysis, while Google Scholar offers broad search capabilities but requires scrutiny for source legitimacy (Creswell and Creswell 123).

Primary Sources include the literary texts themselves—novels, plays, and poems—as well as authors' personal documents like letters and diaries, which can reveal insights into the creative process (Ellmann 250). Historical newspapers and magazines contextualize literary works within their original sociohistorical moments; for example, 1920s New York Times articles enrich understanding of Fitzgerald's *The Great Gatsby* (Greenblatt, *Renaissance Self-Fashioning* 10).

Secondary Sources consist of books and articles that interpret and critique primary texts. These include theoretical frameworks from critics such as Derrida, Foucault, or Freud, foundational to various modes of literary analysis (Barry 26). For instance, applying Freudian psychoanalysis to *Hamlet* offers deeper understanding of character motivation (Tyson 77).

Dissertations and Theses often provide original research on niche literary topics and are increasingly accessible through university repositories, contributing to ongoing scholarly conversations (Dawson 46).

2. Evaluating Sources in Literary Research

- **Authority** involves assessing the credentials of the author and the reputation of the publisher. Academic credentials and affiliation with recognized institutions or refereed journals indicate reliability (Eagleton 74). For example, books published by Cambridge University Press hold more authority compared to non-peer-reviewed personal blogs (Abrams and Harpham 57).

- **Accuracy and Evidence** require sources to provide properly cited, evidence-based claims, with clear references to primary texts (Porter 48). A strong literary analysis bases its arguments on detailed textual evidence rather than unsupported opinion.
- **Objectivity and Bias** are assessed by reviewing whether the source offers balanced perspectives acknowledging multiple viewpoints and maintains a scholarly, neutral tone (Fish 92). Literary criticism should avoid overt emotional bias and present well-supported arguments.
- **Relevance** concerns the pertinence of the source to the specific research question. While some classical criticism remains valuable over time, recent scholarship often addresses new theoretical approaches or contemporary issues, enhancing relevance (Soja 24).
- **Purpose** distinguishes between works aiming to contribute to scholarly fields and those offering personal opinions without scholarly rigor. Priority should be given to writings seeking to advance or challenge literary criticism constructively (Ryan 39).
- **Peer Review and Citations** further affirm a source's reliability. Peer-reviewed articles have undergone expert scrutiny, increasing their credibility. Effective sources also cite other reputable works, demonstrating research thoroughness and facilitating scholarly dialogue (Moretti 51).

Lesson 03: Reading a Text from a Critical Approach

Literary approaches, or critical theories, equip scholars with specific lenses to interpret texts beyond surface meaning. Each approach entails distinct concepts and methodologies tailored to particular aspects of literature, whether they focus on form, psychology, gender, or socio-political contexts (Barry 5). Understanding how and why to select a particular approach is central to deep literary analysis.

1. Selecting a Literary Approach

A clear research goal or question must guide the choice of a critical approach. This clarifies what the analysis aims to uncover—for example, social critique, gender dynamics, or psychological conflict—and ensures that the tools used are well suited to the text (Barry 7). For instance, if one's interest centers on narrative voice or structure, a Formalist or Structuralist approach would be most appropriate (Culler 19). Conversely, analyses of power relations and identity might use Postcolonial or Marxist theories (Said 3; Eagleton 44).

Complementing this, evaluating a text's features aids in approach selection. Rich symbolism or intricate language invites Formalist or Semiotic analysis, whereas texts with strong cultural or historical references lend themselves to Cultural Studies or Historicist perspectives (Greenblatt, *Renaissance Self-Fashioning* 12). This alignment between text and theory enhances interpretive depth. Additionally, the context surrounding a literary work—its historical period, author background, or socio-political milieu—can reveal interpretive layers inaccessible through generic reading. Texts emerging from marginalized communities, for example, may benefit from postcolonial or feminist critiques that foreground issues of identity, power, and resistance (Boehmer 17; Showalter 28).

2. Deepening Literary Analysis

Effective literary analysis integrates multiple elements, utilizing close reading alongside theoretical frameworks. Core to this is close reading—the meticulous examination of language, literary devices, and textual details to uncover meaning embedded in the text's fabric (Richards 23). This entails attention to diction, syntax, imagery, symbolism, and patterns that may initially appear subtle or ambiguous.

Character analysis explores complexities such as character development, contradictions, and symbolic significance. Are characters dynamic, evolving in response to the narrative, or static, representing fixed ideas? Their psychological motivations may be elaborated through psychoanalytic theory to understand unconscious desires or conflicts (Tyson 48).

The setting can be a microcosm reflecting themes or social realities, impacting mood and plot. Analyzing how geography, time, and environment shape narrative developments deepens the analytical scope (Culler 41).

Plot examination investigates the arrangement of events, narrative techniques like foreshadowing or flashback, and underlying causal relationships that build tension and convey thematic material (Barry 31).

Central to many analyses is thematic exploration: identifying the work's overarching ideas and tracing how motifs or symbols reinforce these themes throughout the text (Abrams and Harpham 120). For instance, recurring images may function metaphorically, evoking cultural or psychological meanings.

Dialogue and voice also warrant attention, revealing character relationships, social hierarchy, and authorial intent. Tone and style within dialogue inform the reader's perception of conflict and theme (Richards 45).

Lastly, examination of figures of speech such as metaphor, simile, irony, allusion, and symbolism enables unveiling deeper layers of meaning and emotional resonance (Culler 53).

3. Integrating Theory and Analysis along with Scholarly Conversation

While literary approaches provide frameworks, the art of analysis lies in tightly weaving theory with close textual evidence. This means explicitly connecting theoretical concepts to observable textual features, supporting claims with quotations, and explaining how theory enriches understanding. This integration also invites critical dialogue, engaging with scholarly debates and possibly contesting or refining established interpretations (Barry 10). Through this dynamic interplay, readers develop original and well-supported arguments rather than mere summaries.

4. Worked Example: A Postcolonial Analysis of Joseph Conrad's *Heart of Darkness*

The Portrayal of Native Africans and the Reflection of the Subaltern through the Lens of Spivak's "Can the Subaltern Speak?"

Step One: Choosing the Relevant Literary Theory

In analyzing Joseph Conrad's novella *Heart of Darkness*, postcolonial literary criticism serves as the most relevant theoretical framework. This approach investigates the effects of colonialism on identity, culture, knowledge production, and language—all of which are central themes in Conrad's work (Boehmer 15).

Postcolonial theory critically examines how imperial powers construct and maintain dominance over colonized peoples, exposing modes of oppression reflected in literature.

Step Two: Deepening the Analysis and Identifying Key Elements in the Text

Key elements for postcolonial critique in *Heart of Darkness* include the depiction of European colonial power, the representation—or often marginalization—of native Africans, and the dominance of Eurocentric perspectives (Said 38). Conrad's narrative exposes the oppressive nature of imperialism while portraying native Africans primarily as faceless laborers deprived of individuality, subjected to exploitation and violence (Tyson 421).

The novella vividly describes the harsh physical and psychological abuses inflicted on the native workers, who are often shown enduring starvation, disease, and brutal punishment without recognition or voice. For example, Conrad writes, "They were dying slowly—it was very clear. They were not enemies, they were not criminals, they were nothing earthly now—nothing but black shadows of disease and starvation, lying confusedly in the greenish gloom" (Conrad 24). This graphic imagery foregrounds the natives' dehumanization, marking their suffering as invisible and unheard. Despite their central presence, these African characters remain voiceless within the narrative, symbolizing the silencing inherent in colonial discourse (Spivak 271).

Step Three: Reading the Text through Spivak's Lens and Joining the Scholarly Conversation

Gayatri Chakravorty Spivak's concept of the "subaltern" refers to marginalized groups silenced by colonial and hegemonic structures. Through a postcolonial lens informed by Spivak, *Heart of Darkness* exemplifies how these subaltern voices are suppressed. Conrad's portrayal of Africans as passive and voiceless reflects this dynamic, revealing their lack of agency within the colonial framework.

Spivak asserts that the subaltern cannot simply "speak" because their voices are systematically excluded from dominant narratives. The brutal realities at Kurtz's camp testify to this silencing—native Africans suffer immense cruelty without recourse or articulation of their pain (Spivak 308). Moreover, the depiction of the Congo River as a primeval, mysterious landscape reinforces colonial perceptions of Africa as savage and uncivilized (Conrad 48). This spatial representation is part of a broader discourse that denies identity and humanity to colonized subjects (Boehmer 18). Language plays a crucial role in colonization's imposition of Eurocentric narratives. Marlow's struggles to convey or comprehend African culture illustrate the limitations colonial language imposes, reinforcing power imbalances that shape how indigenous people and their experiences are represented (Said 41).

Engaging critically with Said, Spivak, and Conrad enriches the interpretation of *Heart of Darkness*. Said's theory of Orientalism explains how Western discourse constructs the "Other" to affirm Western dominance, observing that "European culture gained in strength and identity by setting itself off against the Orient as a sort of surrogate and even underground self" (Said 3). This aligns with Spivak's analysis of "Othering," which describes the marginalization of non-Western subjects and their exclusion from agency (Spivak 271). The novel's omission of African perspectives underscores this silencing, privileging European voices (Tyson 425). Conrad's character Kurtz symbolizes colonial corruption—a once-idealistic agent of imperialism consumed by moral degradation. This ambiguity complicates the novel's critique of colonialism, which exposes brutality yet hesitates to fully condemn imperialism as a system (Boehmer 23). Chinua Achebe went further, condemning the novella as "an offensive and deplorable book" (Achebe), a judgment that continues to shape debates about its place in the literary canon.

Lesson 04: Approaches to Literary Analysis

As you embark on your journey in literary studies, you face a fundamental question: How do we approach the relationship between literary theory and textual analysis? This lesson explores two distinct methodological pathways that define contemporary literary criticism—the deductive and inductive approaches—and demonstrates how to determine the most suitable approach for producing sophisticated, meaningful scholarship. Your success as literary scholars depends not merely on your ability to apply theoretical frameworks, but on your capacity to create genuine dialogue between theoretical insights and textual discoveries. The mechanistic application of theory to text, where literary theories become mere instruments rather than integral components of meaningful analysis, undermines scholarly rigor because interpretations appear forced and theories could be easily substituted with other frameworks without substantially changing the analysis (Fife and Gossner 7).

1. The Theory-Driven (Deductive) Approach

Literary analysis operates through two primary methodological approaches. The theory-driven approach begins with an existing theoretical framework and applies it systematically to literary texts. This methodology follows a top-down structure that involves "using existing theory to examine meanings, processes, and narratives" within literary works (Fife and Gossner 3).

1.1. Process Structure

- **Starting Point:** A pre-established theory (Marxist, feminist, psychoanalytic, spatial theory, etc.)
- **Methodology:** Systematic application of theoretical concepts to textual analysis
- **Objective:** Testing or confirming theoretical propositions through literary examples
- **Outcome:** Validation or challenge of existing theoretical frameworks

This deductive approach, as described by contemporary research methodologies, "allows researchers to use existing theory" to structure their investigation of literary phenomena (Fife and Gossner 2). The method follows what researchers term the "deductive-nomological model" where scholars begin with "general laws or principles to explain specific events or phenomena" (Kim 1).

1.2. Critical Pitfalls

However, the theory-driven approach faces several significant risks that can undermine scholarly rigor:

- **Risk of forcing texts to fit predetermined theoretical molds:** This occurs when scholars start with fixed theoretical assumptions and attempt to make literary texts conform to theoretical expectations rather than allowing genuine textual insights to emerge. This leads to interpretations that feel forced, in which one theory could easily be substituted for another without substantially changing the analysis (Fife and Gossner 7).
- Tendency toward mechanistic application without genuine engagement: This refers to applying theory formulaically without deeply engaging with either theoretical concepts or textual

specificities. Such approaches reduce theoretical frameworks to buzzwords or labels instead of exploring their conceptual depth and their relevance to specific literary works.

- **Potential for overlooking textual specificities:** Every literary work possesses unique characteristics—language, style, themes, ambiguities—that may not align with predetermined theoretical frameworks. When analysis rigidly applies theory, these important specificities risk being marginalized or ignored (Brooks and Warren 23).

2. The Text-Driven (Inductive) Approach (Grounded Theory)

The text-driven approach emerges from sustained engagement with literary works themselves, allowing theoretical insights to develop organically from close textual analysis. This methodology follows a bottom-up structure rooted in what researchers term "grounded theory," which emphasizes that "patterns, themes, and categories of analysis come from the data; they emerge out of the data rather than being imposed on them prior to data collection and analysis" (Nathaniel 46).

2.1. Process Structure

- **Starting Point:** Detailed observation of textual elements, patterns, and anomalies through careful close reading techniques
- **Methodology:** Identification of interpretive problems or phenomena within texts and systematic questioning of textual evidence
- **Objective:** Development of theoretical frameworks to explain specific textual observations
- **Outcome:** Generation of novel theoretical insights or critical perspectives that emerge from textual engagement

As Charmaz and Thornberg explain in their examination of quality in grounded theory methodology, this approach ensures that research problems are "not known beforehand" and that theoretical frameworks develop through sustained engagement with primary sources (315).

2.2. Advantages of Text-Driven Analysis

The inductive approach offers several distinctive benefits:

- This methodology maintains sustained attention to the unique details, language, style, and structural elements of literary works. As Showalter describes close reading, it involves "slow reading, a deliberate attempt to detach ourselves from the magical power of story-telling and pay attention to language, imagery, allusion, intertextuality, syntax and form" (98).
- Since analysis begins with textual specificities, this approach opens possibilities for "uncovering new ideas, questions, or meanings that might not fit existing theoretical paradigms" (Ramalho et al. 8). Such organically generated understanding allows scholars to contribute fresh perspectives and original arguments.
- The literary text remains central throughout the analytical process rather than becoming secondary to abstract theoretical concerns. As Brooks and Warren emphasize in *Understanding Poetry*, this approach respects "the poem as an organic unity" where meaning emerges from "relationships among its elements: meter, verse form, imagery, rhyme" (15).

- Rather than imposing predetermined theories, this approach allows theoretical concepts to emerge naturally from interpretive challenges posed by specific texts. These frameworks prove "better suited to textual realities and often more flexible and innovative" because they arise from genuine textual engagement (Nathaniel 54).

2.3. The Interchangeability Crisis and Attribution Fallacy

Contemporary literary criticism faces what can be termed the "interchangeability crisis"—instances where theoretical frameworks become merely instrumental rather than integral to meaningful analysis. This occurs when different theoretical approaches "become interchangeable without substantially altering the critical analysis," as when a reviewer observes that an author could have replaced Lefebvre and space with Althusser and ideology, Gramsci and hegemony, or Foucault and power-knowledge—or with a number of other theorists and concepts—and the article would hardly need to change (Fife and Gossner 4). This crisis indicates that theory functions as superficial ornamentation rather than essential analytical apparatus that genuinely illuminates textual meanings and complexities.

A related problem involves the "attribution fallacy"—confusion between critical interpretations and authors' actual theoretical engagements. This fallacy manifests in three primary ways:

A. Authorial Intention Confusion: Scholars may incorrectly assume that authors consciously employ specific theoretical frameworks when creating literary works. As W. K. Wimsatt and Monroe C. Beardsley famously argued in "The Intentional Fallacy," "the design or intention of the author is neither available nor desirable as a standard for judging the success of a work of literary art" (468). Most creative writers work intuitively rather than through deliberate theoretical application.

B. Theoretical Ventriloquism: This involves making authors appear to articulate theoretical concepts they may never have encountered, transforming creative writers into theoretical mouthpieces rather than recognizing the complex relationships between literary creation and critical analysis.

C. Theory-Driven Prescription: Questions that begin with theoretical assumptions rather than textual phenomena typically lead to mechanistic application, assuming theoretical relevance rather than demonstrating it through genuine textual engagement.

2.4. Strategic Steps to Effective Literary Analysis

- **Beginning with Interpretive Problems:** The most effective critical methodology identifies genuine interpretive challenges within literary works and then develops theoretical frameworks capable of addressing these challenges. This approach ensures that theory serves textual understanding rather than dominating it.
- **Identifying Interpretive Problems:** Scholars should focus on textual elements that create analytical complexity—narrative inconsistencies, thematic tensions, formal innovations, or representational challenges that require theoretical sophistication to address adequately. As close reading methodology demonstrates, successful analysis begins with careful attention to moments where texts resist easy interpretation (Ohrvik 12).

- **Developing Theoretical Responsiveness:** Once interpretive problems are identified, researchers should investigate theoretical traditions that offer conceptual tools for addressing specific textual challenges. This ensures theoretical relevance emerges from textual necessity rather than external imposition.
- **Maintaining Textual Priority:** Throughout analysis, theoretical insights should illuminate textual meaning rather than substituting for careful close reading. Theory should enhance rather than replace sustained attention to literary specificity.
- **Dialogical Engagement:** Rather than merely applying theory to text, sophisticated criticism creates reciprocal dialogue between theoretical insights and textual observations. This synthesis generates new understanding that neither theory nor text alone could provide. In this process, theoretical concepts can be modified or challenged by textual encounters, and the encounter may reveal limitations or complications in a theoretical framework that call for critical adjustment or refinement.
- **Interpretive Innovation:** Effective analysis uses theoretical insights to generate novel readings that advance understanding of both literary works and theoretical concepts. The most valuable criticism contributes simultaneously to literary interpretation and theoretical development.

2.5. Illustrations of Both Approaches

2.5.1. Deductive Approach Illustration

Article: "The Heterotopic Ranch: A Foucauldian Reading of John Steinbeck's *Of Mice and Men*" by Soumaya Bouacida, Mohamed Boussekaa, and Bochra Bouteraa

This article, published in *Akofena*, exemplifies the deductive approach through its systematic application of Michel Foucault's predetermined theoretical framework of heterotopia to Steinbeck's *Of Mice and Men*. The researchers establish their theoretical foundation by presenting Foucault's six principles of heterotopia as a comprehensive analytical framework: crisis and deviation heterotopias, functional transformation over time, incompatible space juxtaposition, temporal relationships, opening and closing systems, and illusion versus compensation functions. This top-down methodology moves from general theoretical concepts to specific textual evidence, with the ranch serving as a testing ground for Foucault's spatial theory. The deductive nature is evident in how the researchers systematically organize their analysis according to Foucault's predetermined structure, dedicating separate sections to each principle and methodically demonstrating how "the ranch in *Of Mice and Men*...is a heterotopia of crisis as it is occupied by workers who are running from the dire economic conditions in America." Each subsequent principle receives similar treatment, with the analysis following Foucault's theoretical blueprint rather than allowing interpretive patterns to emerge organically from Steinbeck's text. The researchers conclude that "the six principles of heterotopia that have been elaborated by Michel Foucault are coincidentally present in Steinbeck ranch as if he was reading the mind of Foucault when he wrote his novella," illustrating the confirmatory nature of deductive literary analysis.

2.5.2. Inductive Approach Illustration

Article: "Tell Me What You Eat, and I Will Tell Who You Are: A Gastronomical Reading of Cultural Identity in Toni Morrison's *God Help the Child*" by Soumaya Bouacida and Zeyneb Benhenda

This article, published in the *Journal for Cultural Research*, demonstrates the inductive approach through its discovery-oriented methodology that builds theoretical insights from careful textual observation of Morrison's *God Help the Child*. Rather than imposing a predetermined analytical framework, the researchers begin by noting specific patterns in Morrison's text, particularly observing that "Morrison imbues the narrative with instances of food and drinks which reflect certain racial stereotypes to which Lula Ann is prone during her struggle to reach self-definition." They identify concrete textual details such as how "some characters and places are purposefully named after food such as Sweetness, Whisky land, Raisin, and Mrs. Queen Olive" and recognize that "Food and Drink imageries are continually used with particular focus on their colour (white or coloured), taste (sweet or bitter), cost (expensive or cheap)." From these specific observations, the researchers gradually develop broader theoretical insights about food as cultural identity marker, drawing on various theorists not as predetermined lenses but as supporting voices for interpretations emerging from the text itself. The inductive progression is clear as they move from particular instances of food imagery to broader conclusions about how "gastronomic images are intrinsic to articulating the character's cultural identity" and ultimately determine that "food becomes a mobile signifier that exhibits different patterns of life." This bottom-up approach allows unexpected connections to emerge, such as the relationship between gastronomical practices and characters' psychological states, which might not have been apparent through theory-driven analysis, culminating in insights about how "gastronomy in Toni Morrison's *God Help the Child* serves as a rich metaphorical tapestry that intricately weaves together themes of identity, cultural assimilation, societal expectations, and empowerment."

To sum it up: The most effective literary analysis emerges from careful identification of interpretive problems within literary texts, followed by responsive application of appropriate theoretical frameworks. This methodology ensures that theory serves textual illumination rather than substituting for close engagement with literary works themselves. By maintaining textual priority while utilizing theoretical sophistication, scholars can contribute meaningfully to both literary interpretation and critical theory development. As the field continues to evolve, the emphasis must remain on cultivating analytical approaches that honor both the specificity of literary texts and the intellectual rigor of theoretical inquiry. Success in literary scholarship ultimately depends not on the mechanical application of predetermined frameworks, but on the capacity to create genuine, productive dialogue between literary works and critical understanding.

Unit Two Workshops

Task 01

Analyze Karen Russell's short story "St. Lucy's Home for Girls Raised by Wolves." First, select one theoretical approach (e.g., feminism, psychoanalysis, or postcolonialism) and refer to at least two critics from that school of thought to support your analysis. In your response, explore how the story reflects or challenges the chosen theory, focusing on character development, themes, or symbolism. Incorporate relevant quotations from both the story and the critics, with proper citation. Next, select a key passage from the story and analyze it twice: once deductively, by applying your chosen theory's principles to the passage, and once inductively, by drawing insights directly from its language, imagery, and structure in order to develop new theoretical observations. Be prepared to present both your theory-driven (deductive) and text-driven (inductive) analyses in class for discussion.

Task 02

Read the following passages from Toni Morrison's *God Help the Child* and write a focused, well-argued paragraph that applies one or more relevant theoretical frameworks.

> **Passage 1**
>
> Afterward, when Bride holds up my compact mirror to her face, I know what she sees will break her heart. A quarter of her face is fine; the rest is cratered. Ugly black stitches, puffy eye, bandages on her forehead, lips so Ubangi she can't pronounce the r in raw, which is what her skin looks like—all pink and blue-black. Worse than anything is her nose—nostrils wide as an orangutan's under gauze the size of half a bagel. Her beautiful unbruised eye seems to cower, bloodshot, practically dead. I shouldn't be thinking this. But her position at Sylvia, Inc., might be up for grabs. How can she persuade women to improve their looks with products that can't improve her own? There isn't enough YOU, GIRL foundation in the world to hide eye scars, a broken nose and facial skin scraped down to pink hypodermis. Assuming much of the damage fades, she will still need plastic surgery, which means weeks and weeks of idleness, hiding behind glasses and floppy hats. I might be asked to take over. Temporarily, of course.

> **Passage 2**
>
> Today is Monday or is it Tuesday? Anyway, I've been in and out of bed for two days. I've stopped worrying about my earlobes; I can always get them pierced again. Brooklyn telephones and keeps me up to date on office matters. I asked for and got an extension on my leave. She is "acting" regional manager now. Good for her. She deserves it just for getting me out of that Decagon catastrophe, taking care of me for days, seeing to the return of my Jaguar, hiring a cleaning crew, choosing the plastic surgeon. She even fired Rose, my maid, for me. I couldn't have healed without Brooklyn. Still, her calls are fewer and fewer.

Task 03

Read the following passages critically and answer the questions below.

> **Passage 1 — Joseph Conrad, *Heart of Darkness***
>
> The dusk was repeating them in a persistent whisper all around us, in a whisper that seemed to swell menacingly like the first whisper of a rising wind. 'The horror! The horror!' 'His last word—to live with,' she insisted. 'Don't you understand I loved him—I loved him—I loved him!' I pulled myself together and spoke slowly. 'The last word he pronounced was—your name.' (Conrad 70)

> **Passage 2 — Karen Russell, "St. Lucy's Home for Girls Raised by Wolves"**
>
> My mother recoiled from me, as if I was a stranger. TRRR? She sniffed me for a long moment. Then she sank her teeth into my ankle, looking proud and sad. After all the tail wagging and perfunctory barking had died down, the parents sat back on their hind legs. They stared up at me expectantly, panting in the cool gray envelope of the cave, waiting for a display of what I had learned. 'So,' I said, telling my first human lie. 'I'm home.' (Russell 210)

Questions

1. What thematic or interpretive gap is implied in both passages? Explain how this gap contributes to the overall meaning of each text.
2. Which theoretical approach would be most effective for analyzing the implied gap in both passages? Justify your choice.

SEMESTER ONE

Unit Three: Research Proposal Development in Literature

IN THIS UNIT

- Lesson 01: The Research Proposal (Part One)
- Lesson 02: Research Proposal (Part Two)
- Unit Three Workshops

Lesson 01: The Research Proposal (Part One)

Introduction

A research proposal in literary studies serves to delineate the scope, objectives, and methodology of a planned investigation, as well as to outline the organization of the resulting written work. Early submission of a proposal enables supervisors to provide critical feedback and approve the researcher's intended approach (Wallwork 12). Effective proposals articulate clear research questions, justify the significance of the study, and indicate how the project will be structured, ensuring alignment between aims, methods, and anticipated outcomes (McMillan and Weyers 45). In literary research, proposals typically include an introduction to the topic, a concise review of key scholarship, a statement of research objectives, an overview of methodological strategies, theoretical application, and comparative analysis. By adhering to established conventions for proposal writing, scholars lay the groundwork for rigorous, focused research in the field of literature.

1. Techniques for Producing a Good Proposal

McMillan and Weyers recommend several strategies to ensure a strong research proposal. First, conduct comprehensive background reading to identify the latest debates and trends in your field, prioritizing recent review articles that highlight areas in need of further investigation (McMillan and Weyers 48). Second, develop a clear hypothesis or central research question early on; use brainstorming and mind-mapping techniques as you review sources to refine your focus (McMillan and Weyers 50). Third, remember that the proposal is a preliminary plan rather than a finished study, so you need not draft full chapters at this stage (McMillan and Weyers 52). Fourth, seek feedback: discuss your outline with your supervisor, share drafts with peers, and incorporate their suggestions, all while maintaining scholarly tone and clarity (McMillan and Weyers 54). Finally, write for both specialists and informed non-experts by defining key terms precisely and distinguishing between broad aims—your general intentions—and specific objectives—measurable steps toward those aims (Wallwork 37).

2. Benefits of a Research Proposal

A well-crafted proposal guides the researcher through each phase of the project by helping to clarify research plans, allocate resources, and manage literature effectively (Wallwork 15). It sharpens focus on the study's objectives and methods, outlines the scope of inquiry, and indicates how the final dissertation or article will be organized. Moreover, early feedback on the proposal provides invaluable direction, ensuring that the research remains feasible, original, and aligned with disciplinary standards (McMillan and Weyers 56).

3. Components of an Academic Research Proposal

3.1. Title Guidelines

Crafting an effective title demands precision and clarity. Titles should be concise yet informative, conveying the study's core argument without superfluous wording. Incorporate key thesis terms to ensure immediate relevance. You may choose a single unified phrase—*The Spatial Sites of Memory in*

Charlotte Perkins Gilman's "The Yellow Wallpaper"—or a two-part structure separated by a colon—*Unveiling the Past: Memory and Identity in Contemporary Literature* (Wallwork 165–70). Visually, many titles follow a "V" shape, beginning broadly before narrowing to specifics, which guides readers swiftly from general topic to focused inquiry (Wallwork 169).

3.2. Background of the Study

The background section of your proposal establishes the context for your research, guiding readers from broad scholarly conversations to the specific focus of your study. Begin with a "funnel structure," introducing relevant theoretical frameworks or historical overviews before narrowing to your precise topic. For example, Edward Said's concept of Orientalism offers a lens for examining how cultural representations shape power dynamics (Said 3). From there, provide a concise overview of the critical debates surrounding your theme—such as discussions of memory and identity in contemporary literary works—highlighting points of consensus and contention among scholars.

Avoid extensive plot summaries or detailed author biographies; these distractions can dilute your scholarly intent. Instead, if a synopsis is necessary, limit it to elements that directly inform your argument. For instance, rather than outlining an entire narrative, focus on how a particular motif—such as recurring architectural imagery in *Wide Sargasso Sea*—illuminates postcolonial identity formation (Culler 67). By structuring your background in this way, you orient readers to the broader intellectual landscape, demonstrate the gap your research addresses, and underscore why your study matters within its academic context (Wallwork 195–96).

3.3. Statement of the Problem

The statement of the problem elaborates upon the issue implied by your title, presenting it in clear, concise terms so that even non-specialists grasp the study's rationale. A well-defined research problem emerges from a gap in existing scholarship—identifiable through critical engagement with the literature—and frames the focus of inquiry. Problematization, as Catherine Belsey explains, involves critically questioning underlying assumptions, exposing contradictions, and juxtaposing competing theories or unresolved questions to intensify the topic's complexity (Belsey 52). By constructing a narrative of rising tensions—through contrasting viewpoints or divergent findings—the researcher draws readers into the heart of the investigation while demonstrating why the issue merits scholarly attention.

At the culmination of this section, articulate your thesis statement: the central claim you will defend throughout the study. Accompany this with targeted research questions that act as a roadmap for exploration. These questions should directly address the identified gap and may take various forms to deepen analysis: explanatory questions uncover causes or reasons; comparative questions examine similarities and differences; evaluative questions assess impact or value; analytical questions break down complex phenomena; and predictive questions anticipate future developments (Wallwork 199–200).

3.4. Objective(s) or Purpose of the Study

Objectives are affirmative, measurable statements derived from your research questions that clearly define the outcomes you aim to achieve. Serving as a roadmap, they outline the steps necessary to

address the research problem and guide every phase of the study. To ensure clarity and coherence, objectives should be written in concise, straightforward language and listed from general to specific or in order of importance. Each objective must be both actionable and measurable, providing the basis for evaluating the research design, data analysis, results, and conclusions. Strong objectives thus form the foundation for assessing whether the study fulfills its intended purpose. When drafting objectives, employ precise action verbs—such as "analyze," "evaluate," "compare," "explore," "demonstrate," and "synthesize"—to convey exactly what the study will accomplish (Wallwork 214–15).

3.5. Significance of the Study

The significance section articulates the value of your research by specifying its contributions to scholarly knowledge, theoretical development, or practical application. This segment should unambiguously state how the study advances understanding in the field—whether by exploring an underexamined text, applying an innovative theoretical framework, introducing a novel methodology, or offering a fresh critical perspective. Highlighting these unique contributions demonstrates the study's originality and justifies its importance within academic discourse. By clearly framing the research's broader impact—such as filling gaps in the literature or influencing pedagogical practices—you reinforce the relevance and necessity of your work (Wallwork 271–73).

Lesson 02: Research Proposal (Part Two)

3.6. Literature Review

A literature review serves two primary functions: to establish the theoretical foundation of your research and to demonstrate how your study integrates into the broader scholarly dialogue. It surveys prior work on your topic, evaluates achievements and shortcomings, and identifies the gap your research will address (McMillan and Weyers 102–04).

3.6.1. How to Make a Review of Related Literature

Begin by posing key questions about existing scholarship:

- What are the seminal works? Identify foundational texts that shaped the field
- How has the discourse evolved? Highlight major studies that built upon these classics
- Which recent studies are most relevant? Present them chronologically or thematically, showing their connection to your topic.
- What are their achievements and limitations? Critically assess where these works succeed and where they fall short.
- What gaps remain? Specify unexplored or underexplored areas revealed by these limitations.
- How does your research fill this gap? Clearly explain your study's unique intervention in addressing these open questions.

3.6.2. The Form of the Review of Related Literature

A well-organized review of related literature begins with an introduction that situates your topic and outlines the scope of the survey (Wallwork 215). For example:

The intersection of postmodernism and metafiction in contemporary English literature has been widely discussed; however, there are few comprehensive studies exploring its impact on reader engagement in Don DeLillo's works.

Next, gather and organize sources that are directly relevant to your research, prioritizing recent publications to ensure up-to-date coverage. As you review each work, summarize or paraphrase key ideas and note methodological approaches. Arrange your discussion either chronologically—to trace the evolution of scholarship—or thematically—to compare and contrast different perspectives (Wallwork 216).

When presenting foundational works, identify seminal texts such as Roland Barthes's "The Death of the Author" and Linda Hutcheon's *A Poetics of Postmodernism*. Then highlight major studies that build upon these classics, such as Currie's *Postmodern Narrative Theory*. For each, assess achievements and limitations to reveal gaps: for instance, while Hutcheon foregrounds metafiction's self-reflexivity, her analysis leaves underexplored how these techniques engage readers in meaning-making. Finally, explicate how your research addresses these gaps by filling the gap—for example, examining interactive narrative strategies in *White Noise* and *Zero K*.

3.7. Structure of the Study (Chapterisation)

3.7.1. Theoretical Framework (Chapter 1)

This chapter establishes the theoretical foundation for the research by exploring key concepts, approaches, and critical theories. For example, if the study examines postmodernism, you might discuss Jean-François Lyotard's skepticism of grand narratives and Fredric Jameson's analysis of cultural logic. This section also reviews prior scholarship, identifying gaps or unresolved issues that your study will address.

3.7.2. Analytical Study (Chapter 2)

The second chapter applies the theoretical framework to your primary text. For instance, when focusing on Don DeLillo's *White Noise*, this chapter analyzes themes of hyperreality and consumer culture through postmodern theory. Close readings of pivotal scenes demonstrate how DeLillo constructs fragmented narratives that critique contemporary society.

3.7.3. Analytical Study (Chapter 3)

The third chapter extends the analysis to additional texts or comparative cases. For example, you may examine *Zero K* to explore technological transcendence and its implications for identity and mortality. Through detailed textual analysis, this chapter reveals how DeLillo evolves his critique of human experience across different works.

3.8. Bibliography

The bibliography (Works Cited list) is formatted according to MLA 8th edition style and organized alphabetically.

4. Example of a Literary Research Proposal

> **"Art as a Vehicle to Conjure Up the African American Memory in Alice Walker's *The Temple of My Familiar*"**
>
> *by Selma Bousbia and Ferdaous Bouanika*

1. Background

Despite the atrocities of slavery, discrimination, and oppression, African Americans have managed to preserve their culture for generations. Art has played a significant role in their heritage, enabling them to express their identity and to reflect their resistance through the ages. With their voices finally being heard in the Americas, art becomes a subversive weapon for Black creatives to illuminate their experiences and to convey their resistance. Alice Walker, the renowned "griot historian" who has made an everlasting impact in the world of literature, is one who has effectively used art to speak out against oppression and to represent her people's history through her writing. In her magnum opus, *The Temple of My Familiar*, Walker crafts a multi-narrative novel that traverses the personal lives of Zedé, Carlotta, Arveyda, Suwelo, Fanny, and Lissie. Through non-linear storytelling, the novel navigates the history of African Americans, their cultural heritage, and the complexities of their identities.

2. Research Problem

In her work, Walker aims to represent the "other side" of history and to portray the memory of her ancestors as a revolutionary force, rather than merely a tool for literary aesthetics. The novel strongly emphasizes the duty to remember and denounces forgetting, demanding a comprehensive acknowledgment of history (Martikke 184). To achieve this, due to the interconnectedness of photography and painting with culture and memory, the author employs an intersection between the visual power of these mediums with her characters to conjure up the memories of the marginalized African American history throughout time—a group whose truth has been historically silenced and ostracized. By weaving together the potent visual mediums of photography and painting, Walker's novel proves its ability to conjure the memory of the spirits of African American history. The analysis of this study is conducted by examining a range of scholars' viewpoints, which exhibit both converging and contradictory perspectives on the relationship between painting and photography with personal and cultural memory. Henceforth, this study raises several key questions: How do scholars interpret the intersection between these visual mediums with memory? What is the significance of Walker's use of art, particularly, photography and painting? And how are these forms of art able to evoke and portray the marginalized history of African Americans?

3. Objectives

In parallel with Walker's *Temple,* this research aims to investigate the alliance of photography and painting with memory, through a comprehensive examination of viewpoints expressed by art critics, mainly Roland Barthes, Susan Sontag, John Berger, Henri Cartier-Bresson, Maurice Merleau-Ponty, and others. Further, it underscores the subversive potential of these visual mediums in evoking the complexities and ostracized cultural memory of African Americans.

4. Significance

Exploring the theme of memory in the African American heritage within Alice Walker's *Temple* is a noteworthy undertaking in the field of research. However, this study brings a fresh artistic perspective to scrutinize the concept of memory through the use of the two visual mediums: photography and painting. Hence, this research, which draws on the insights of selected critics, is exceptionally original and significant, as it showcases the subversive potentials of photography and painting in resurrecting the memory of African American history.

5. Review of Related Literature

As a prominent literary work, numerous scholars have engaged in the exploration, critique, and analysis of Walker's *Temple*, each making distinct contributions to the field of research. In 2015, in her research titled "Broken Images: Questioning of Pictures and Photographs as Elements of Hyperreality in the Fiction of Alice Walker, Toni Morrison, and Gloria Naylor," Kusumita Mukherjee examines both photography and paintings in Walker's literary works through the lens of Baudrillard's Simulacrum. Contrary to the conventional belief that visuals serve as faithful representations, capturing the true essence of their subjects, *Temple* shifts this notion from "the fake usurps the original" to the idea that the original does not deserve to be depicted (1). This shift aims to unravel the authentic reality of African Americans, rather than presenting their pictorial reality that has been distorted by Eurocentric media (2). In "Black Magic: Woman(ist) as Artist in Alice Walker's

The Temple of My Familiar" , published in 1992, Clara Juncker conducts an examination of the role of artist women in the novel. She delves into the significance of each woman's interaction with various forms of art, such as painting, sewing, photography, make-up, and massage. These multiple art forms shed light on the uniqueness and foreignness of feminine creativity, as well as the challenges faced by women artists. Furthermore, the article explores how their artistic affinity plays a significant role in shaping their identities, fostering flexibility, promoting self-care, and facilitating self-expression and self-discovery.

Additionally, by portraying female artists through a feminized lens, Juncker illuminates the subversion of traditional masculine norms and the capacity of women artists to decode and challenge their surroundings. In 1992, Ikenna Dieke, in his "Toward a Monistic Idealism: The Thematics of Alice Walker's *The Temple of My Familiar*," argues that painting serves as a profound means for individuals to undergo spiritual and imaginative development. It provides a unique avenue for perceiving and connecting with the "vitalistic pulse of God evolving throughout the universe" (510). Dieke supports his claim by examining Hal's and Lissie's nature art and paintings, specifically focusing on the twin artworks "Self-portrait, Lissie Lyles" and "Self-portrait, Harold D. Jenkins." These artworks embody the metaphysical principle known as "objective idealism," a term drawn from Schelling's philosophy. Consequently, this creative intelligence of painting serves as a powerful tool in fostering the acceptance of nature as an "ultimately ideal or spiritual, existing independently of any subjects" (510).

In her article titled "There is More to It than Meets the Eye: Alice Walker's *The Temple of My Familiar*, a Narrative of the Diaspora," Silvia Del Pilar Castro Borrego explores the ways in which African American writers engage in reconstructing and revising history within their contemporary fictional works. Borrego specifically examines Alice Walker's novel, highlighting the interconnectedness between memory and imagination, as well as storytelling, as significant devices that allow for a journey "back to the origins of culture and civilization in an attempt to explain the injustices imposed on people of color globally" (11). She argues that through the recollection of memories associated with the character Lissie Lyles, a feminine ancestral figure, Alice Walker departs from conventional methods of historical research and presents the untold story of Black women in the diaspora (11). In doing so, Walker's novel challenges dominant historical narratives and emphasizes the importance of memory in shaping personal and cultural identity. This act underscores the transformative power of the past in reconstructing marginalized cultural identities. Consequently, Borrego emphasizes that the novel explores the essential role of historical and spiritual revision by focusing on re-memory and storytelling as tools to re-write (re-right) the history of the past (12). The studies mentioned above demonstrate that various artistic mediums, such as photography and paintings, have been studied in Walker's novel. However, no critic has explored the role of art in evoking memories of African Americans, nor has any approached this topic from multiple perspectives of Roland Barthes, Susan Sontag, John Berger, Henri Cartier-Bresson, and Maurice Merleau-Ponty. Hence, this study contributes to the existing criticism by conducting a comprehensive research analysis on how art serves as a vehicle for conjuring up the spirits' memory of African American history.

6. Methodology

From a methodological standpoint, this study employs both argumentative and analytical approaches to delve into the central theme of the topic. As a thematic and theoretical study, its analysis primarily draws upon the perspectives of various critics namely Roland Barthes, Susan Sontag, John Berger, Henri Cartier-Bresson, Maurice Merleau-Ponty, and others who examine the association of photography and painting with personal and collective memory. With their diverse perspectives, art critics enrich the research to fully explore the potency of photography and painting in evoking and portraying the marginalized history of African Americans.

7. Structure of the Study

This research comprises a general introduction, three requisite chapters, and a general conclusion. The first chapter is theoretical, and the remaining two are analytical. The three chapters investigate the significance of photography and painting in relation to memory, based on various critics' perspectives. The first chapter titled "Art as a Bridge to Memory" provides an overview of how art is utilized in literature and gradually focuses on African American literature, along with multiple selected arguments by critics regarding painting and photography with memory. The second chapter entitled "Unearthing the Memory of the Ostracized African American Heritage through the Indelible Potency of Photography" examines two primary notions of photography: its ability to communicate and its vitality to remain, both of which enable it to evoke the memories of African American heritage. The third chapter entitled "Illuminating the Veiled: Resurrecting the Distorted African American Memory through Painting" explores the intricate dimensions of painting by examining its multifaceted roles in evoking the collective memory of African Americans and highlighting the striking contrast between the painter and the photographer.

5. Checklist for Evaluating Research Proposal Components

Students are advised to use this checklist to verify the soundness and completeness of their proposals before submission.

Research proposal element	Yes / No	Justification
Title. Is the title clear, concise, and reflective of the research topic? Does it capture the essence of the proposed study?		
Background. Does the introduction provide context for the research problem?		
Problem. Is there a clear statement of the research problem and the research questions?		
Thesis and objectives. Are the thesis and the research objectives clearly stated? Are they specific and aligned with the research questions?		
Literature review. Has the literature review been conducted thoroughly? Are the key works in the field included, and is the review up to date?		

Research proposal element	Yes / No	Justification
Significance. Are the potential implications of the study, or its contributions to the field, highlighted?		
Methodology. Does the proposal outline the research methodology to be used? Are the theoretical framework and the methods of analysis explained in sufficient detail?		
Structure. Is the structure of the study (chapterisation) clearly outlined?		
Citation. Are citations properly formatted (MLA) and included in the bibliography?		

Unit Three Workshops

Task 01

Read the following incomplete research proposal, and then write a comprehensive background together with a clearly defined statement of the problem.

Incomplete proposal

Therefore, this study seeks to prove that gender is performative and it can be subverted and redefined not based on the individual's innate identity, but rather on the expectations and norms of society in Nadia Hashimi's *The Pearl That Broke Its Shell*. This research attempts to answer several crucial questions: What is gender performativity? Why do female characters suffer from gender trouble in Afghan society? How do they fit in with their new gender identity? Finally, how do they succeed in resisting misogyny and social norms, and reconstructing their feminine identity? The prime objective of this study is to clarify the concept of gender performativity treated by Nadia Hashimi. It also investigates the gender trouble among the female characters in *The Pearl That Broke Its Shell*. Furthermore, it will provide a deep analysis of both experiences of changing their gender identities. Finally, this study will highlight the achievements of both characters Rahima and Shekiba, and the empowerment of their own identities. In recent years, the concept of gender performativity, as theorized by Judith Butler, has gained considerable attention in literary studies, yet few studies have examined this concept specifically in *The Pearl That Broke Its Shell*. For the sake of providing an insightful analysis, some works are worth reading. For instance, Sumara Shahzadi's "Subalternity in *The Pearl That Broke Its Shell*: An Alternative Feminist Analysis," drawing on Spivak's theory, gives a vivid depiction of gender subalternity and the resistance of Afghan women describing the relationship between gender and Islamic countries. It also proves that the other or the subaltern can speak despite that the woman in Afghan society is considered a voiceless being because of her gender focusing on how men use religion as an excuse for their oppressive attitude.

In addition, Roshni C. strives to solve the issue of identification in her article "Representation of Women and Politics of Identification Crisis." She investigates the Bacha posh customs, explains how males completely disregard women's obligations, and how both Rahima and Shekiba attempt to improve their lives. Furthermore, the story concludes on a hopeful note, with Rahima and Shekiba's courage serving as an inspiration to young Afghan women working hard to forge their identities in a patriarchal nation. Nadia Hashimi's book addresses various critical issues in Afghanistan with the hopes that, if not now, then in the future, it would result in a beneficial shift in public opinion. Every female character in this story has suffered from problems. It is extremely difficult for any woman to survive in this society. Besides, Amel Abbady's article "Bacha Posh: Gender Crossing in Nadia Hashimi's *The Pearl That Broke Its Shell*" explores the tradition of Bacha posh in Afghan culture and how the Afghan girls were obliged to cross-dress and live as a boy for years to get the freedom and the right to educate, this study shows the complex interplay between crossdressing and transgender identity, this article argues that the Afghan culture appears deeply as misogynistic by the tradition of Bacha posh not as the transgression of gender norms but a legitimate cultural practice.

In her article entitled "The Identity Crisis among Afghan Girls as a Result of Bacha Posh Practice," J. Rajasree Menon attempts to show gender dysphoria, identity crisis, and marginalization among Afghan women through the cultural practice of Bacha posh system. The Afghan girls feel gender dysphoria at the time of their puberty and they cannot adjust with their female gender. Some scholars and studies discussed Nadia Hashimi's *The Pearl That Broke Its Shell*, and analyzed the challenges and the major issues in the novel and the identity crisis of Afghan women, they also focused on how the cultural tradition led to gender problems because of an oppressive society, however proving that gender is not innate using performativity is neglected by the critics, thus, this research presents an insightful analysis on the notion of gender performativity of the female

characters by highlighting the main points.

This study delves into the analysis to add on what other researchers have concluded on the performativity of gender that the female characters in the novel have endured, and how both have managed in reconstructing their feminine identities. Unlike the previous studies this study examines gender performativity in the novel from a new perspective, it reveals some of the uncovered details about the different ways that participated in deconstructing the female identity. Methodologically speaking, this research discusses the notion of gender performativity from a feminist perspective. The analysis of Hashimi's *The Pearl That Broke Its Shell* is based on the conceptualization of gender performativity theory by the theorist Judith Butler, and some critics such as Catharine MacKinnon, Nikki Sullivan, and Alison Stone, stressing on the notion of performativity to unravel the link between gender, identity and oppression. Since identity was deconstructed by society which led to the performativity of gender as well, the study applies the previously mentioned theorist and critics' works to prove this claim and to grasp the process of resisting patriarchy in *The Pearl That Broke Its Shell*. To provide a different perspective on the concept of gender performativity in the female characters, the research applies ideas and theories of feminist perspectives.

This dissertation consists of a general introduction, a general conclusion, and three main chapters, each one dealing with a specific aspect of the theme of the research. The first one is theoretical and the other two are analytical chapters. The first chapter entitled "Gender Performativity as a Feminist Approach" deals with the historical background of the theory with a contextualized theoretical framework of the research, it provides the reader with a well-founded explanation of the essential terms used in the research based on the most significant theorists in the field namely Judith Butler. Then, the second chapter, entitled "Performing Gender in *The Pearl That Broke Its Shell*," is about the analysis and exposure of the difficulties and struggles of the two main characters in Hashimi's work, and also about how and why they experience the trouble of changing their own gender identities. Finally, the third chapter entitled "Reshaping Gender identity Through Resilience" deals with how Rahima and Shekiba succeed and mark a change, besides, proving that gender is not innate or biologically determined but performative. It also focuses on how they find their real gender identity and are strong through their journey to finding their real self.

Task 02

Write the missing parts of the following proposal: the review of related literature, the methodology, and the structure of the study. For the review, search for criticism on the novel, choose three or four critics, take notes, and then organize your ideas chronologically, respecting the basic outline of a literature review.

"Post-colonialism Revisited: The Interplay of Nostalgia and Trauma in Ahlem Mosteghanemi's *The Bridges of Constantine*" by Manel Boudebza

The European colonization in Africa was a time of turmoil, pain, and resistance that left a serious impact on the colonized psyche. In reaction to the French invasion of Algerian lands, Algerians consistently resisted the brutality of the French colonizer militarily, socio-politically, and psychologically. After the decolonization process, the Algerians did enjoy a free nation without the colonizer's oppression. However, the impact of the colonial times seems to be an indelible scar in the formerly colonized memories. After the withdrawal of the European colonization in Africa, thousands of Africans, particularly Algerians whether voluntarily or unwillingly, moved back and forth between home and empire. Some of them were forced into exile as a punishment, but others were pushed to leave their motherlands because of the new unbearable situation their country witnessed. Their immigration did not help in healing their trauma because they intensely and recurrently feel nostalgic. Different Algerian writers lucidly portray the truth of the miserable conditions provoked by colonialism. They reacted through their narratives using different themes and techniques. Huda Darwich, Tahar Ouettar, and Ahlem Mosteghanemi are among the prominent writers who are deeply immersed in revolutionary themes and challenge the colonial writing in their mother tongue. According to Murad Mosteghanemi, Ahlem Mosteghanemi is a contemporary Algerian novelist. Mosteghanemi was born on April 13, 1953, in Tunisia. Mosteghanemi is famous worldwide as an Arabic-language author whose works have been translated into English and French. She places great value on writing and expressing herself in Arabic. Her best-selling novel *The Bridges of Constantine* reads as the nostalgic memoir of a traumatized mujahid. The novel implicitly depicts the love of nation and patriotism, explicitly embodies the trauma left by colonialism and resistance towards corruption after independence and exile. Ahlem Mosteghanemi's novel describes an extraordinary tale of passion that is specifically Algerian, moving between Paris (exile) and Constantine (nationhood). The anti-colonial fight is a crucial process that necessitates a cancellation of national responsibilities obstructed by trauma.

This study discusses the issue of the colonial subject who unwillingly exiles himself to the empire for the reason that he lost his belonging to his homeland. The subject faces a socio-political and emotional trauma caused by the detachment of home. Therefore, he uses his nostalgia as a weapon to resist the events brought about by colonialism. The current research holds three capital questions: How do nostalgia and trauma emerge as outcome themes of post-colonialism? How does it manifest itself in the principal character "Khaled Ben Toubal"? How does Khaled Ben Toubal use nostalgia as a site of power to resist his trauma? The thesis investigates the way Khaled uses nostalgia as a weapon to resist his emotion and trauma. The aim of this study is to dig deeper into the effects of colonialism on the colonized. It is about analyzing how nostalgia is linked to memory, showing the way it becomes a means to resist the colonial residues. In addition the study explores how the main character reacts to the colonizer through using body and art. Studies were conducted on the issue of trauma in *The Bridges of Constantine*, but they rarely refer to nostalgia as a way of resisting trauma. This study is also significant in the way it revisits post-colonialism from a psychological perspective. It pays attention to the importance of interplay of trauma and nostalgia as a major aspect of post-colonial novel in comparison to other aspects.

Task 03

Below is an excerpt from a research proposal, reproduced as submitted (errors included) for the purpose of this exercise. Using a checklist, evaluate the correctness and consistency of the proposal.

Proposal for evaluation

Within the realm of literature, the depiction of family holds a significant and influential position, serving as a potent lens through which writers shed light on the intricate dynamics of human relationships.Family plays a crucial role in shaping individuals and influencing their experiences. By the complexities of its storylines which vacillate between affectionate bonds and conflicts, family narratives captivate the reader and resonate with him by its shared experiences. Being a part of the family tapestry, the father also holds a unique position within these narratives. The Father owns an archetypal representation of authority, guidance, and nurturing characterization. However, some other representations coexist with the previously mentioned archetypal depiction. The pivotal figure, whether through his presence or absence, leaves remarkable impact on his child. Understanding the multifaceted role of the father in literature unravel the complexities of a broader societal, and cultural dynamics.

Harper Lee's *To Kill a Mockingbird*, contains various examples of families and fathers who are portrayed within the context of 1930s American Society. Set in the southern town of Maycomb, the novel delves into the challenging dynamics shaped by racism, prejudice and injustice. Against this backdrop setting, the role of fathers in shaping their children's perspective became evident. As they navigate the cultural and societal conflict of the time. Through vivid story telling, Lee highlights the complex interplay between fathers and their children shedding light on the profound impact they have on shaping their worldview. The research problem at hand explores the significance of fathers in a 1930s American southern community and investigates the impact they have on their children's experiences and long-term outcomes, particularly in relation to their specific approaches to fatherhood. With an awareness of the socio-cultural context marked by pressing concerns.

The research attempts to answer the following questions: how is the father figure challenged in the novel? How do societal and cultural factors shape the expectation and the responsibilities placed on fathers in Maycomb? How does the absence or the presence of the father figure influence the behavioral and/or emotional development of the child?

The primary objective of this study is to illuminate the role of the father. By closely examining the portrayal of fathers in *To Kill Mockingbird*, the study seeks to gain deeper understanding of the complexities and significance of paternal influence within the context of societal upheaval. Furthermore, this study endeavors to shed light on the interplay between the personal and the societal lenses, investigating how fathers' decisions and behaviors are influenced by the larger cultural and historical context, and in return how they affect the future of their descendants. The study aims to examine variant manifestation of fatherhood within society grappling with racial prejudice, social injustice, and moral ambiguity. By examining the complexities of fatherhood in *To Kill Mockingbird*, the research aims to contribute a deeper understanding of the role of fathers in shaping individual identities, moral compass, and social dynamics during times of turbulence and uncertainty.

Scholars have delved into the depths of Harper Lee's timeless masterpiece, *To Kill a Mockingbird,* traversing its narrative landscape from various vantage points. Their explorations have illuminated the novel's multifaceted themes, extracted universal lessons, deciphered symbolic motifs, and drawn connections to historical contexts. Some others have tackle the theme offatherhood and especially the figure of Atticus Finch who has controlled much of the scholarly attention .the later is

described as moral compass in the novel not only to his children but also readers across the globe that Martin Luther king and Michelle Obama quoted for him .Isrra Hasan Jassim, in her article entitled "The Influence of Father on Family and Society, a study in Harper Lee's To Kill a Mockingbird and Charles Dickens's Dombey and son, discusses the contrasting depiction of fathers in literature, particularly focusing on Atticus finish and Dombey. Like the title suggests, Jassim's analysis focuses on the examination of how these fathers shape and influence their children.Jassim argues that Atticus presents the epitome of positive father figure, embodying moral values and serving as a moral guide for his children, particularly his daughter, Scout. Atticus' strong presence and fatherly concern are evident in his nurturing and protective nature towards Scout, fostering her coming-of-age journey. Jassim highlights the close bond and deep connection between Atticus and Scout. However, Jassim's analysis appears to overlook the character of Jem, and fails to acknowledge the diverse representation of fatherhood represented by Harper Lee by focusing primarily on Atticus and Scott. Jassim misses the nuanced exploration of fathers and their unique influences on their children within the broader context of the novel.

In her article "To kill a mockingbird: Fifty years of influence on the legal profession," Ann Enger offers a unique perspective on the book, delving into its impact on the legal profession. Anger considers the novel to be masterpiece that serves as a source of inspiration for attorneys, with particular emphasis on the character of Atticus Finsh. According to Enger, Atticus, as a lawyer embodies the deep longing and insecurities that attorneys experience. She suggests that Atticus symbolizes the lawyer's pursuit of public respect and influence while starving for personal equilibrium. Within the realm of low, Enger highlights Atticus' role as a lawyer as being paramount to his other roles within the novel. Ann briefly acknowledges attack Atticus Finch role as a father, highlighting his remarkable composure in the face of threats to his children lives. However, her primary focus is on Atticus' commendable qualities as a legal professional. Enger praises his calm demeanor. Additionally, she contrasts him with Mr. Radley, emphasizing the letter's written rigid adherence to his promise to the judge at the expense of his own son's well-being and future.

Some other critics have seen childhood as key subject in the novel. Among these critics Claudia Durst Johnson in her book *Understandingto kill Mockingbird* where she discusses the theme of innocence in relation to the children of the novel. She argues that children in the novel are able to recognize the good and evil in people despite the prejudice of the society. She further explains that the children's perspectives allow them to see the world and the town in unique way, where they are not yet tainted by the biases and the prejudice of adults. Despite the separate and distinct discussion of these two themes by various critics, this study aims to undertake a comprehensive analysis of the portrayal of both figures within the novel. Furthermore, it seeks to evaluate the extent to which the influence of father is reflected in the lives of their children.

This study will offer a comprehensive conceptual and historical examination of Fatherhood. It seeks to explore how scholars and intellectuals have approached the topic over time. Then, it moves to tackle it as one of the most significant themes in Harper Lee's *To KillMocking Bird*. By closely analyzing the variant representation of the father figure, the study further builds a link between the father with his offspring. It assesses the influence of the father on his child. The study assesses also the profound impact of further positive or negative traits, as well as his absence, on his youngest children through the lens of literary criticism.

> The research work is divided into three chapters. The first chapter is entitled: "Fatherhood unveiled: exploring the historical, psychoanalytical, and contemporary perspective on paternal rules in American Society." The chapter collects the most influential scholarly discourse on fatherhood. The second chapter is entitled: "divergent representation of fatherhood in this Harper Lee's *To Kill a Mockingbird*. It will focus on the multifaceted depiction of fatherhood within the novel. The third chapter, will examine the long-term effects of some paternal experiences reflected in children's personalities. Accordingly, the chapter is entitled by "Unravelling the power fatherhood: Understanding the impact of paternal influence on children."

Task 04

Write a complete research proposal (from A to Z) on one of the following topics:

- The Animal as a Symbol of Empowerment in Hurston's "Sweat"
- The Animal as African American Women's Perfect Familiar in Hurston's "Sweat"

SEMESTER TWO

Historical Research

SEMESTER TWO

Unit Four: Foundations of Historical Research

IN THIS UNIT

- Lesson 01: Introduction to Historical Research
- Lesson 02: Identifying the Historical Problem

Lesson 01: Introduction to Historical Research

1. Defining History

History encompasses the study of human experience across time and space, traditionally classified by period (prehistoric, ancient, medieval, modern), theme (economic, military, social, cultural, political), and scale (local, regional, national, international). International history investigates transformative events such as the French Revolution or the World Wars, while local history focuses on community-level social, economic, and political changes. These classifications underscore history's breadth as a discipline that integrates diverse human activities across contexts.

At its core, history is the analysis and interpretation of the past, revealing patterns of continuity and change. Historians interrogate a range of evidence—including written records, oral testimonies, and material artifacts—to reconstruct narratives that illuminate the present and open vistas onto possible futures. Aristotle conceived of history as a systematic explanation of human motives and behavior, whereas Henry Johnson defined it expansively as "everything that has ever happened" (Schrag 9–10). E. H. Carr later described history as an ongoing dialogue between historians and facts —a dynamic interplay between past and present.

Building on these foundations, Zachary M. Schrag reframes history as fundamentally the study of human agency and contingency: "history is the study of people and the choices they made" (Schrag 10). Schrag's emphasis on agency shifts attention from natural or structural forces to the decisions of individuals and communities. He illustrates this through Marc Bloch's example of Flanders: although geological siltation created new land, it only entered history when people built dikes, channels, and relocated Bruges's harbor in response. Thus, contingency—"the belief that had people made different choices, matters could have turned out differently"— becomes central to historical inquiry (Schrag 11).

Yet agency unfolds within constraints. Karl Marx's observation that "men make their own history, but they do not make it just as they please" underscores that choices are shaped by institutions and prior conditions (qtd. in Schrag 13–14). Historians therefore balance exploring contingency with recognizing structural limits.

History's dual purpose—empathy for past actors and relevance to contemporary issues—reflects ongoing methodological debates. Should historians prioritize reconstructing past mentalities or applying historical insight to modern problems? Schrag argues for both: historians must honor the past on its own terms while using that understanding to shed light on current challenges (Schrag 14–15). This duality ensures that history remains a living conversation across generations, constantly enriched by new sources, questions, and interpretations (Schrag 21–23). Besides, philosophical reflection further shapes historical practice. As Yogesh Kumar Singh notes, historians' frameworks influence how they interpret evidence, aligning history with disciplines like literary theory and social science that view society as a dynamic organism subject to continual transformation (Singh 113). A. N. Whitehead's insight that each moment contains both its history and the seeds of its future highlights the inseparable link between past and present, echoing George Bernard Shaw's assertion that "the past is not behind the group, it is within the group" (qtd. in Singh113). These perspectives affirm that

studying social phenomena requires tracing their development over time to capture their full meaning.

In sum, history is neither a mere chronicle of facts nor a static archive; it is an interpretive, contingent, and contested enterprise. By examining human choices within their structural contexts and acknowledging history's ongoing evolution, historians craft narratives that both explain the past and illuminate the present.

2. The Historian's Ethics

Historical ethics evolve continuously in response to new challenges and debates. In the twenty-first century, we face questions about respectful use of culturally sensitive archival materials, the provenance of displaced documents, and the benefits and perils of digitizing primary sources (Schrag 25). Schrag emphasizes that "historians' first ethical obligation is to understand that historians have ethical obligations, and to educate themselves appropriately" (Schrag 25).

2.1. Curiosity

The first virtue of the research historian is curiosity. As Schrag states, "If you already know the answer when you begin a project, you are not doing research" (Schrag 25). Historians must remain open-minded throughout their research process, avoiding confirmation bias—the tendency to ignore evidence that challenges initial assumptions while highlighting evidence that reinforces them. Confirmation bias has historically allowed generations of male historians to ignore women in their stories and white historians to downplay slavery's horrors (Schrag 25). The American Historical Association emphasizes that "professional integrity in the practice of history requires awareness of one's own biases and a readiness to follow sound method and analysis wherever they may lead" (Schrag 26).

2.2. Accuracy

While E. H. Carr once compared praising a historian for accuracy to praising an architect for using properly mixed concrete, Schrag argues that accuracy deserves more recognition (Schrag 26). Historians working with contradictory, fragmentary sources—sometimes in foreign languages or from unfamiliar contexts—cannot expect complete accuracy. Instead, the standard should be replicability, meaning others can repeat the study because detailed methods are available. This commitment to accuracy requires proper citations, footnotes, and sometimes the admission of uncertainty. As Schrag notes, historians must sometimes say "I don't know" (Schrag 27). Factual accuracy alone, however, does not guarantee good history, since facts do not select themselves but are chosen and arranged by the historian's thinking.

2.3. Judgment

Historians must exercise judgment in selecting and interpreting evidence. The classical historian Tacitus wrote that history's highest function was "to let no worthy action be uncommemorated, and to hold out the reprobation of posterity as a terror to evil words and deeds" (Schrag 27). Some historians embrace this judgmental role, while others prefer helping readers form their own conclusions. John Hope Franklin argued that historians serve as the conscience of their nation by

presenting different lines of action, pointing out conflicts and inconsistencies, and highlighting defects when they exist (Schrag 28). However, Marc Bloch regarded passing judgment as a lazy alternative to explanation, arguing that understanding Luther's soul is more valuable than writing for or against him. Historians must also decide whom to hold accountable for their words and deeds. Jason Sokol's approach illustrates this principle: he named segregationists who wrote public letters to officials but protected the privacy of university students whose essays were not intended for publication (Schrag 28).

2.4. Empathy

Historians must empathize with the people they study, understanding their thoughts and actions even when they find them baffling or reprehensible. J. B. Peires demonstrates this principle in studying the Xhosa people's destruction of their food supply in the 1850s, arguing that we must understand why beliefs that seem absurd to us seemed logical and plausible to the Xhosa of 1856 (Schrag 30). Even when writing about murderers, thieves, or war criminals, historians are bound to attempt seeing the world through their subjects' eyes. As Annette Gordon-Reed and Peter Onuf explain regarding Thomas Jefferson, "We instead seek to understand what Thomas Jefferson thought he was doing in the world" (Schrag 31). The goal is to understand everyone as fully formed individuals with complex motivations. Lincoln Mullen clarifies that historical empathy goes beyond simply retelling people's stories—it involves revealing deeper patterns of thought and demonstrating what it was possible for people to say within their historical constraints (Schrag 31).

2.5. Gratitude

Despite history's reputation as a solitary pursuit, historians depend extensively on others. As Schrag notes, "historians accumulate debts" to colleagues, mentors, students, family members, librarians, archivists, editors, publishers, and readers (Schrag 32). Good historians credit the assistance they receive through citations, acknowledgments, and public recognition of others' work. Historians consume public resources through jobs, grants, publicly supported libraries and archives, and expert time. In return, they have a duty to share their findings through accessible writing, reasonably priced publications, public lectures, and open venues. Schrag emphasizes that while historians deserve compensation for their hard work, they should feel "some duty to the society that supports them" (Schrag 33).

2.6. Truth

Lawrence Cremin argued that we study history "not because in its absence there will not be any history, but rather because in its absence we shall have a corrupt history; we shall have the myths, distortions, and the ideologies that flourish in the absence of critical scholarship" (Schrag 33). Bad history—whether in films like *Gone with the Wind* or in political analogies—imperils our ability to make wise choices. Historians explicitly define some of their work as demythologizing events, though they must acknowledge that professional historians have sometimes contributed to myth-making themselves. The solution is not censorship but better history that can compete with and correct misleading narratives.

3. Historical Research

Historical research applies the scientific method to historical problems, insisting on the same precision and methodological rigor typical of other forms of research (Andrews 15). The process involves identifying a research question, developing hypotheses, systematically collecting and verifying evidence, and ultimately producing critically analyzed historical accounts (Andrews 16). In education, historical research is particularly valuable, as it illuminates the origins and efficacy of educational systems and theories, enabling critical evaluation of both enduring and emergent practices (Andrews 18).A historical study is fundamentally a critical examination of past events, developments, and experiences, demanding a meticulous appraisal of the sources and evidence used to reconstruct the past. The purpose is to apply reflective thinking to unresolved social issues by tracing patterns in past events, ideas, and attitudes, ultimately providing a foundation for future social or educational activities (Singh 114).

4. Purpose of Historical Research

The reasons for pursuing historical research are as varied as the individuals undertaking it, but generally fall into two principal categories:

- The primary aim is to acquire a clearer understanding of the present. Most contemporary issues possess a historical context, and appreciating this context is vital for grasping their true significance (Singh 114).
- In the context of education, investigating its history allows educators to recognize and address systemic weaknesses in their educational systems (Singh 114).

5. Limitations of Historical Research

Historical research is subject to several inherent limitations that affect its accuracy, scope, and reliability. These include reliance on incomplete or biased data, difficulty in generalizing findings across contexts, the subjectivity of interpretation, and limited ability to test hypotheses. Furthermore, the problem of confirmation bias presents a significant challenge to objective historical analysis.

5.1. Reliance on Incomplete or Biased Data

Historical research often depends on sources that are fragmentary or inaccessible, limiting the completeness of historical narratives. Many primary sources have been lost, destroyed, or remain inaccessible due to historical circumstances or preservation issues. This scarcity means historians frequently reconstruct events from partial evidence, which can skew understanding. Additionally, surviving sources may present biased perspectives, as they often originate from dominant groups or specific viewpoints. For instance, official government records or newspapers may reflect political agendas or social prejudices of their time, thus necessitating careful scrutiny and cross-examination of sources (Schrag 176–180). The historian must critically evaluate the provenance, purpose, and selection processes of sources to mitigate these biases (Schrag 178).

5.2. Difficulty in Generalizing Findings

Historical research is context-specific, focusing on particular times, places, and events, which limits the ability to extrapolate broad conclusions. The particularities of social, cultural, and political contexts mean that findings from one historical setting may not be applicable to another (Schrag 87–91). This context-dependence restricts the generalizability of historical insights, making historians cautious about drawing universal theories of human behavior or social development from isolated studies.

5.3. Subjectivity of Interpretation

The interpretive nature of history means that different researchers may reach divergent conclusions even when examining the same data. Historians bring their own theoretical frameworks, cultural backgrounds, and personal biases to the task of interpreting evidence. This subjectivity contributes to multiple, sometimes conflicting, historical narratives (Schrag 40–45). Interpretation is further complicated when evidence is ambiguous or contradictory, requiring historians to make informed judgments that inevitably carry elements of personal perspective (Schrag 42). The evolving nature of historical scholarship means that reinterpretations and revisionism are common, reflecting shifts in societal values and academic trends.

5.4. Limited Ability to Test Hypotheses

Unlike experimental sciences, historical research cannot manipulate variables or conduct controlled experiments. Researchers study events that have occurred only once, with no ability to recreate or alter conditions (Schrag 88–90). While historians can formulate hypotheses about causes and effects and test these against available evidence, the inability to conduct experiments restricts definitive validation. This limitation means causality in history often remains probabilistic rather than certain.

5.5. Confirmation Bias and Its Impact

Confirmation bias—the tendency to favor information that supports preconceived beliefs—poses a significant risk in historical research. Historians may unconsciously or consciously select and interpret evidence in ways that validate their hypotheses or ideological commitments, sometimes ignoring contradictory data (Schrag 222–225). For example, early historiography about colonized peoples often reflected Eurocentric biases, presenting colonialism in a favorable light by selectively citing sources or dismissing indigenous accounts (Schrag 224). Confirmation bias can also manifest in political histories, where historians align interpretations with nationalistic narratives. Awareness of this bias requires historians to rigorously seek out opposing viewpoints, question assumptions, and be transparent about their research methodologies.

Lesson 02: Identifying the Historical Problem

1. Steps of Historical Research

Historical research follows a systematic process similar to that of scientific research, albeit with adaptations to account for its unique nature. According to Yogesh Kumar Singh in his *Fundamentals of Research Methodology and Statistics*, the steps in historical research are as follows:

1.1. Identification and Definition of the Problem: This stage is challenging as it requires pinpointing a research problem with historical significance and ensuring that sufficient data exist to address it effectively. The problem must be clearly located and well-defined within the historical context (Singh 116).

1.2. Collection of Data: Data collection in historical research can involve a variety of methods, such as excavating ancient ruins, discovering forgotten manuscripts, or examining available records like diaries, minutes of meetings, letters, and other documents. These data are typically categorized into primary sources (original documents or artifacts from the period under study) and secondary sources (later analyses or interpretations) (Singh 116).

1.3. Criticism of Data: After collection, the validity of the data must be critically examined. This involves two processes: first, verifying the authenticity of the sources themselves (external criticism), and second, evaluating the credibility and accuracy of the content within those sources (internal criticism). This dual review ensures that only reliable and relevant data underpin conclusions (Singh 116).

1.4. Interpretation of Data: The interpretation phase involves analyzing the data through the lens of hypotheses or theoretical frameworks relevant to the research question. Data are compared and synthesized to form generalizations or conclusions that highlight their overall significance and contribute to understanding historical phenomena (Singh 116).

2. Characteristics of a Good Topic

A good historical research topic possesses several essential characteristics that ensure scholarly rigor, methodological soundness, and meaningful contribution to knowledge. These characteristics encompass clarity of focus, source availability, continuity with existing scholarship, interdisciplinary approaches, regional significance, and social relevance.

2.1. Clear Definition and Scope

A superior research topic must be clearly defined in its geographical and chronological parameters (Brundage 68). This precision enables focused investigation while preventing the researcher from becoming overwhelmed by an overly broad subject. The topic should be "specific enough to allow in-depth research but broad enough to find sufficient sources," avoiding overly general subjects that lack analytical depth. Clear temporal and spatial boundaries help establish manageable research parameters while ensuring the study remains coherent and purposeful.

2.2. Sufficient Source Availability

The availability of adequate primary and secondary sources is fundamental to successful historical research. Research supervisors typically recommend topics with abundant source material, as this "provides a wider scope for interpretations of the source material" and enables comprehensive analysis (Brundage 75). Topics lacking sufficient documentation limit the researcher's ability to construct convincing arguments and may result in speculative conclusions rather than evidence-based scholarship. The accessibility of sources—whether through archives, libraries, or digital repositories—directly impacts the feasibility and quality of the research project.

2.3. Continuity with Previous Scholarship

Effective historical research builds upon existing scholarship rather than operating in isolation. Most historians prefer topics that demonstrate "continuity in research studies, so that they can make use of the earlier works on the subject" (Brundage 76). This continuity allows researchers to engage with established historiographical debates, identify gaps in knowledge, and position their work within broader scholarly conversations. Such engagement ensures that new research contributes meaningfully to the field rather than merely repeating previous findings.

2.4. Interdisciplinary Approaches

Contemporary historical research increasingly favors topics requiring interdisciplinary methodologies, particularly those incorporating "anthropological history, economic history and social history" perspectives (Regional Studies Association). This interdisciplinary orientation reflects recognition that historical phenomena are complex and multifaceted, requiring diverse analytical frameworks for comprehensive understanding. Topics examining "the impact of ecological, environmental, and geographical infrastructure on human activity" exemplify this trend toward holistic, cross-disciplinary investigation.

2.5. Regional and Local Significance

Good research topics increasingly emphasize regional factors and local studies, reflecting a shift from national-level analysis toward more granular investigation. After reaching "a level of exhaustion of national level sources, historians have started to make microscopic searches and studies of regional sources" (Institute of Historical Regional Studies). Village-to-village surveys and local interviewing projects are gaining prominence because they "can bring to light unknown facts and factors with many a new interpretation." This regional focus allows historians to test broader hypotheses against specific case studies while uncovering previously overlooked historical experiences.

2.6. Social Relevance and Contemporary Application

Modern historical research must demonstrate relevance to "social needs, economic perspectives and political integration" rather than pursuing knowledge for its own sake. The traditional antiquarian approach is giving way to research that bridges "the gulf between the present and the past" by addressing contemporary challenges through historical analysis. Government and society increasingly expect historical research to fulfill social responsibility by informing current policy debates and fostering sociopolitical integration. This emphasis on practical application ensures that historical scholarship remains vital and engaged with pressing contemporary issues.

2.7. Contribution to Knowledge

Ultimately, a good research topic must "make a meaningful contribution to the field, either by offering new insights, challenging existing interpretations, or filling gaps in the historical record" (StudyCrumb). The research should possess "thesis potential" that lends itself to "a clear, arguable thesis statement" supported by evidence. This requirement for original contribution distinguishes scholarly research from mere compilation of existing knowledge and ensures that each project advances historical understanding in some measurable way.

3. Types of Historical Topics

The scope of historical inquiry encompasses a diverse array of topics, each of which foregrounds different dimensions of the past. Rather than methodological categories, these topics define the substantive foci around which historians organize evidence and interpretation.

3.1. Biographical History

Biographical history centers on the lives of individuals—rulers, intellectuals, artists, or ordinary people—to reveal broader social and political currents. By tracing personal trajectories, biographers illuminate how agency and context interact, from the policymaking of monarchs to the everyday choices of commoners (Roberts 12).

3.2. Administrative History

The study of administration examines the development and functioning of governmental institutions. This topic investigates bureaucratic structures, legal codes, and official correspondence to uncover how states exercised power, managed resources, and implemented policy (Harris 47).

3.3. Regional History

Regional history explores the unique dynamics of geographical areas—provinces, cities, or ecological zones—within larger political and economic systems. By combining local archives with travel narratives and economic records, scholars reconstruct how regions functioned as dynamic spaces shaped by both local agency and global forces (Braudel 163).

3.4. Cultural History

Cultural history analyzes the creation, circulation, and reception of symbols, practices, and material artifacts. This topic ranges from monumental architecture (temples, forts, stupas) to everyday rituals (festivals, religious rites), exploring how meaning is produced and contested over time (Burke 4–5).

3.5. Social History

Social history foregrounds the experiences of groups defined by class, gender, ethnicity, or occupation. Drawing on parish registers, court records, and personal diaries, it reconstructs patterns of work, family life, and community organization. Informed by Marxist theory, many social historians highlight class struggle as a driving force in human affairs (Hobsbawm 22).

3.6. Economic History

Economic history investigates production, trade, labor relations, and the distribution of wealth. From the conditions of agricultural and industrial laborers to the rise of merchant capitalism, this topic employs quantitative data—wage statistics, price series, taxation records—to map long-term economic transformations (O'Brien 98).

3.7. Maritime and Commercial History

Maritime history studies seaborne trade, navigation technologies, and port networks. By analyzing ship logs, customs registers, and nautical charts, historians trace the expansion of commerce from ancient Mediterranean routes to global early-modern trading systems, revealing how maritime exchange shaped cultural encounters (Pearson 57–59).

3.8. Fiscal and Revenue History

Fiscal history focuses on state finance—tribute, taxation, budgets, and public debt. It examines how rulers raised revenue, distributed expenditures, and responded to fiscal crises. Sources include treasury ledgers, parliamentary debates, and fiscal edicts, which together chart the evolution of revenue administration (Ferguson 145).

SEMESTER TWO

Unit Five: Data Collection, Data Analysis, and the Research Proposal

IN THIS UNIT

- Lesson 01: Gathering Primary and Secondary Sources in Historical Research
- Lesson 02: Evaluating Historical Sources
- Lesson 03: Historical Data Interpretation and Analysis
- Lesson 04: The Historical Research Proposal
- Unit Five Workshops

Lesson 01: Gathering Primary and Secondary Sources in Historical Research

At the foundation of any rigorous historical inquiry lies the systematic collection and evaluation of primary and secondary sources. This lecture outlines key definitions, strategies for locating evidence, criteria for assessing credibility, and best practices for organizing and integrating sources into scholarly arguments.

1. Definitions

Primary sources are direct, contemporaneous records of past events: letters, diaries, official documents, photographs, newspapers, oral testimonies, artifacts, and born-digital materials (Schrag 22). Secondary sources are analytical interpretations crafted after the fact—monographs, journal articles, historiographical essays, and textbooks—that synthesize, critique, and contextualize primary evidence (MA-History-SEM-4 5).

2. Locating Primary Sources

2.1. Archives and Special Collections

Consult national, regional, and university archive catalogues and online finding aids to identify relevant collections (Schrag 45). Examine catalogues for manuscript series, record groups, and collection guides; note call numbers, custodial histories, and access restrictions (Schrag 46–47).

2.2. Digital Repositories

Utilize platforms such as HathiTrust, Europeana, Chronicling America, and institutional digital archives for newspapers, government publications, and personal papers.

2.3. Oral History and Interviews

Design protocols that secure informed consent, adhere to ethical guidelines, and ensure high-quality audio/video recording (Kumar 156–57). Transcribe interviews promptly and attach detailed metadata (speaker, date, location, topics) to facilitate retrieval and analysis (Schrag 52).

3. Locating Secondary Sources

3.1. Library Catalogues and Indexes

Search OPACs and union catalogues (e.g., WorldCat) by subject headings and keywords to discover monographs and edited volumes (Schrag 59). Query article databases (JSTOR, Project MUSE, Historical Abstracts) using controlled vocabulary and Boolean operators to retrieve peer-reviewed articles (MA-History-SEM-4 18).

3.2. Bibliographies and Citation Tracking

Examine reference lists in recent scholarship to uncover seminal and emerging works (Schrag 61). Use citation-tracking tools (Google Scholar “Cited by,” Web of Science) to map scholarly impact and identify related debates (MA-History-SEM-4 20).

4. Categories of Primary and Secondary Sources

Historical research begins with primary sources—original materials created during the period under study—and extends to secondary sources, which interpret and analyze those materials. This section elaborates major categories of primary sources and introduces secondary sources, using established definitions and classifications.

4.1. Primary Sources

A. Contemporary Records

These are documents produced at the time of events. They include business and legal papers, official instructions, stenographic and phonographic records, autobiographies, and journal entries. Contemporary sources such as newspapers and diaries reveal public understanding and reactions to events as they unfolded ("Primary and Secondary Sources" 1).

B. Confidential Reports

Created for internal use, these reports—military dispatches, diplomatic cables, personal letters, and diaries—offer candid insights but may reflect the author's private agenda. Though less accessible, they provide vital evaluations of performance and decision making (*Methodology of the Writing of History* 12).

C. Public Reports

Intended for general audiences, these vary in reliability.

- Newspaper dispatches depend on the reporting agency's standards.
- Memoirs and autobiographies, often written late in life, may suffer from fading memory or self-justification.
- Official corporate or government histories may omit sensitive material (*Methodology of the Writing of History* 12–13).

D. Government Documents

Laws, legislative acts, court opinions, regulations, and statistics (fiscal data, census returns) constitute firsthand evidence of state actions and social conditions. Their official status grants authenticity, but historians must evaluate potential biases in data collection and presentation ("Primary and Secondary Sources" 1; Singh 210).

E. Public Opinion

Expressed in editorials, speeches, pamphlets, and letters to the editor, public opinion sources gauge contemporary attitudes. However, they require corroboration, as media agendas and propaganda can distort popular sentiment (Singh 198).

F. Archaeology

Material remains—buildings, tools, pottery, seals, coins, and monuments—provide tangible evidence of past societies. Classical (historical) archaeology focuses on documented cultures, while prehistoric archaeology explores eras before writing. Archaeologists excavate, date, and analyze artifacts to

reconstruct cultural evolution and human behavior (Schrag 46; *Methodology of the Writing of History* 15).

G. Epigraphy

The study of inscriptions on stone or copper plates. Epigraphers identify scripts, date inscriptions, and interpret their socio-political contexts. Indian epigraphy dates to the eighteenth century under British scholars, systematizing methods for decipherment and contextual analysis ("Primary and Secondary Sources" 1).

H. Literature

Written works with artistic or intellectual merit—poetry, novels, plays—offer reflections of cultural values and societal concerns. Primary literary sources include manuscripts, letters, speeches, and eyewitness accounts embedded in creative texts (Singh 156).

I. Archival Records

Archives preserve records of individuals or organizations. Archival science focuses on appraisal, preservation, and cataloguing to ensure integrity and accessibility. An archivist authenticates materials and organizes them by provenance and context (*Methodology of the Writing of History* 4–5).

J. Online Archives

Digital repositories replicate physical archives, providing remote access to digitized manuscripts, books, and audiovisual materials. They require metadata standards to maintain authenticity and usability ("Primary and Secondary Sources" 1).

K. Numismatics

The study of coins and currency, revealing economic practices, weight standards, metallurgical techniques, and iconography. Inscriptions on coins aid in dating and palaeographic research, while coin distributions illuminate trade networks (*Methodology of the Writing of History* 17).

L. Folklore

Oral traditions—legends, proverbs, folk tales, and rituals—transmit communal beliefs and customs. Folklorists distinguish authentic cultural elements from legendary accretions, using folklore to understand popular values and social norms ("Primary and Secondary Sources" 1).

4.2. Secondary Sources

Secondary sources analyze, interpret, and synthesize primary materials. Researchers must evaluate secondary sources for authority (author expertise, peer review) and methodological transparency (clear citation of primary evidence and historiographical engagement) (Singh 198). Major types include:

A. Scholarly Monographs and Journal Articles: Peer-reviewed works that advance historical arguments by critically engaging primary evidence (Schrag 59).

B. Historiographical Essays: Surveys of scholarly debates, tracing the evolution of interpretations on specific topics (Schrag 61).

C. Reference Works: Encyclopedias, dictionaries, and handbooks offering concise overviews and directing researchers to primary documents ("Primary and Secondary Sources" 1).

D. Textbooks: Syntheses of established scholarship, useful for context but reliant on secondary interpretations ("Primary and Secondary Sources" 1).

E. Dissertations and Theses: In-depth studies that frequently uncover new archival materials and propose original analyses (Schrag 74).

Lesson 02: Evaluating Historical Sources

1. Criteria of Evaluation

Evaluating historical sources ensures that the evidence we use is trustworthy and meaningful. Four key criteria guide this process: accuracy, authority, coverage, and relevance.

- **Accuracy** asks whether the information matches other known facts and stands up to verification. For example, if a diary entry claims a battle occurred on a certain date, the historian checks military dispatches or newspapers from that day. Footnotes or errata in published editions often note textual uncertainties, and physical inspection of manuscripts—looking for smudges or missing pages—helps identify later additions or losses (Schrag 72).
- **Authority** examines who created the source and where it is housed. A government census published by a national archive carries institutional credibility, whereas an anonymous blog post requires caution. Verifying an author's credentials—academic affiliation or professional expertise—and checking web domains or copyright statements on digital sources guard against relying on unverified information (Singh 198; Schrag 80).
- **Coverage** considers whether a source provides sufficient depth and scope for the research question. A single letter may offer vivid personal perspective but lack broader social context; a collection of correspondence spanning years gives a fuller picture. Historians assess whether sources address the right time period and geographical area and whether they include necessary details—statistical tables, verbatim speech transcripts, or descriptive reportage—to support analysis (Schrag 82).
- **Relevance** measures how well a source illuminates the topic at hand. A merchant's ledger may not directly explain military strategy but can reveal wartime economic strains. By situating a source within its cultural and political milieu—using secondary studies on diplomatic history or social customs—scholars determine whether it offers unique insights or corroborates other evidence (Schrag 77).

2. Types of Historical Criticism

Historical criticism requires careful evaluation of evidence to distinguish truth from error. Historians rely on external and internal criticism to establish a source's authenticity and the validity of its content.

- **External criticism** asks, "Is this document genuine?" and examines the physical and contextual features of the source. It involves tests of provenance—handwriting, signatures, paper or ink composition, and custodial history—to detect forgeries or later alterations (Varma qtd. in Singh 198). For example, chemical analysis of ink can confirm whether a letter dated 1645 was actually written centuries later. Likewise, comparing a stone inscription's lettering style to known examples from the same period verifies its age (Schrag 72).
- **Internal criticism** assesses accuracy and trustworthiness of the source content. Historians ask whether the author was competent, unbiased, and had first-hand knowledge of the events described (Schrag 80). A military commander's dispatch, though authentic, might exaggerate

enemy strength to secure reinforcements. Cross-referencing that dispatch with eyewitness diaries and official casualty lists helps reveal distortions (Singh 210).

Together, external and internal criticism ensure that historians work with reliable, accurate, and meaningful evidence. Only after a source passes both evaluations can it contribute confidently to our understanding of the past.

Lesson 03: Historical Data Interpretation and Analysis

1. Data Analysis Steps

To extract meaningful insights from a political or historical document, historians apply a structured set of questions and techniques that illuminate both its form and content. The following steps—illustrated with examples—demonstrate how to analyze a primary text effectively.

- **Examine the source's physical characteristics.** Begin by noting the document's material form: manuscript handwriting, typeface, paper quality, or seal. An original nineteenth-century diplomatic dispatch on rag paper may bear watermark and official seal impressions that confirm its date and governmental origin (Schrag 46). Physical inspection can also reveal later erasures or marginalia that indicate subsequent readers' responses. For instance, a wartime telegram dated July 1914, written on flimsy banker's telegram form, shows creases and tear marks consistent with urgent military transmission, suggesting it was forwarded immediately without archival preparation (Schrag 47).
- **Identify authorial purpose and intended audience.** Ask why the document was created and for whom. A political pamphlet aimed at rural voters employs populist rhetoric and appeals to local grievances; in contrast, a policy memo drafted for cabinet ministers uses technical language and dense statistics (*Methodology of the Writing of History* 22). Understanding purpose clarifies both explicit arguments and implicit assumptions. For instance (to take a hypothetical case), in an 1830 address to Congress, a senator frames tariff policy as necessary for "national survival," targeting fellow legislators; his invocation of economic hardship among frontier farmers signals an effort to broaden support beyond industrial interests (Singh 163).
- **Situate authorial context.** Research the author's background—social class, occupation, political affiliation—and contemporaneous events. A governor's proclamation during a labor strike reflects both executive authority and prevailing class tensions (Schrag 52). Biographical knowledge helps assess potential biases and corroborate claimed expertise.
- **Analyze rhetorical strategies and language.** Conduct a close reading to uncover how arguments are constructed. Note key metaphors, emotive language, and rhetorical devices. Political manifestos often employ binary oppositions—"liberty versus tyranny"—to polarize debate. Examine both what is said and what is omitted: silences may signal taboo topics or strategic concealment (Schrag 50).
- **Apply the "Five Ws" framework.** For each document, record:
  - Who authored it and under what authority?
  - When and where was it produced?
  - What is its central claim or information?
  - Why was it written, and for which audience?

Answering these questions situates the text within broader historical processes and reveals its intended function (*Methodology of the Writing of History* 23).

- **Corroborate with related sources.** Compare the document's claims against contemporary newspapers, private letters, or subsequent official reports. Divergences—such as a minister's rosy public report contrasted with eyewitness letters describing unrest—highlight propagandistic elements (Schrag 54).
- **Assess significance and legacy.** Finally, reflect on the document's impact: did it shape policy, public opinion, or subsequent historiography? A revolutionary manifesto may have inspired mass mobilization even if its immediate legal effect was minimal. Tracing citations of the text in later speeches or scholarly works reveals its enduring influence (Schrag 53).

By following these steps—inspecting form, interrogating content, and situating the text within its historical milieu—researchers transform raw documents into nuanced interpretations of political and social change.

2. Writing the Historical Report

A strong historical report opens with a clear thesis statement that advances a precise argument or research question. This thesis anchors the entire narrative and guides the selection of evidence. For example, rather than announcing "this paper examines Reconstruction," a focused thesis might read: "Reconstruction's failure in South Carolina derived from contested land policies that disenfranchised freedmen" (Schrag 102). After the introduction, organize the report into logically ordered sections. Each section should address a distinct aspect of the thesis—such as legislative debates, land redistribution, and local resistance—and begin with a topic sentence that previews its argument. Within each paragraph, present evidence drawn from primary documents (legislative acts, newspaper editorials) and relevant secondary analyses, integrating quotations and data with interpretive commentary. Transitions—words like "therefore," "moreover," and "on the other hand"—help readers follow the progression of ideas without interrupting the narrative flow (*Methodology of the Writing of History* 24).

Each paragraph should develop a single point supported by clear evidence. For example, one paragraph might explain how the Southern Homestead Act of 1866 and Freedmen's Bureau reports conflicted with white landowners' goals (Singh 142). In MLA style, such documents are cited by their titles in the parenthetical reference—for example, (*Southern Homestead Act*) or (*Freedmen's Bureau Report*). To make dry facts more engaging, historians sometimes add a touch of narrative detail—what Hockett calls "a bit of colour"—without compromising accuracy (qtd. in Schrag 85). A brief story of a freedman narrowly avoiding eviction can bring statistical data to life while keeping the focus on verifiable events.

Conclusions synthesize key findings and reflect on their broader significance. Historians should acknowledge any limitations—such as gaps in the archival record—and propose areas for future research, for example, comparative studies of land reform in other former Confederate states. A strong conclusion returns to the thesis, demonstrating how the evidence presented confirms, refines, or complicates the original claim. By combining meticulous organization, coherent transitions, balanced use of color, and rigorous citation, historical reports achieve both credibility and readability.

Lesson 04: The Historical Research Proposal

1. Aspects of the Research Proposal in History

In a history research proposal, the opening section provides a historical background, situating the topic within its chronological and geopolitical context. The researcher reviews the historiography, summarizing how prior scholars have addressed the subject and related themes (for example, land reform in Reconstruction-era South Carolina) and identifies a gap—an unanswered question or under-explored angle—that the project will address (Schrag 13–14). From this gap emerges the research problem and, where appropriate, a hypothesis, such as "restrictive land policies, rather than economic decline alone, explain freedmen's persistent poverty." A concise list of analytical questions follows—Who enacted these policies? How did local officials implement them?—along with the study's objectives (e.g., to assess policy impact) and the significance of filling this gap for understanding American democracy's early failures (Singh 47–48).

The methodology section then explains the researcher's approach. In history proposals, this means naming the methods of historical research—such as historical, descriptive, analytical and comparative—and detailing the major primary sources (legislative records, Freedmen's Bureau correspondence, contemporary newspapers) and secondary sources (monographs on Reconstruction, journal articles on land tenure) that undergird the analysis (Borg 5). Unlike literary proposals, which often foreground theoretical frameworks before sources, history proposals integrate sources into the methodology to demonstrate feasibility and rigor (Hill and Kerber 9). Next comes the structure of the study. Historians typically outline chapters around dependent and independent variables: a theoretical chapter examines the dependent variable (freedmen's economic status), the following chapter explores the independent variable (land legislation), and a third analyzes the relationship between them (comparative outcomes across counties) (Borg 8).

A distinctive feature of history proposals is the limitations section, in which researchers acknowledge obstacles—archival gaps, biased sources, or restricted access—that may constrain their work and propose strategies to mitigate these challenges (*Methodology of the Writing of History* 16). While both disciplines require clear research questions and structured plans, history proposals emphasize the explicit role of primary and secondary sources and the practicalities of dealing with historical evidence, whereas literature proposals prioritize theoretical engagement with texts.

2. Methods of Historical Research

A. Historical

Walter Borg defined historical research as "the systematic and objective location, evaluation and synthesis of evidence in order to establish facts and draw conclusions about past events." It involves exploring the meaning and relationship of events, and as its resource it uses primary historical data in the form of historic artifacts, records and writings. It attempts to find out what happened in the past and to reveal reasons for why and how things happened. The value of historical research has been categorized by Hill and Kerber as follows:

- It enables solutions to contemporary problems to be sought in the past.

- It throws light on present and future trends.
- It stresses the relative importance and the effects of the interactions that are found within all cultures.
- It allows for the revaluation of data supporting selected hypotheses, theories and generalizations that are presently held about the past.

B. Comparative

Comparative research is often used together with historical research. Researchers compare people's experience of different societies, either between times in the past or in parallel situations in the present. These studies can be on the macro level, e.g. studying the role of revolutions in class struggle, or on the micro level, e.g. individual experiences in different types of marriage. It is often easier to understand phenomena when they are compared with similar phenomena from another time or place. Culture and society rely heavily on what has gone before and often use references from the past to justify the present.

C. Descriptive

Instead of examining records or artifacts, descriptive research relies on observation as a means of collecting data. It attempts to examine situations in order to establish what is the norm, i.e. what can be predicted to happen again under the same circumstances. Observation can take many forms, depending on the type of information sought: people can be interviewed, questionnaires distributed, visual records made, even sounds and smells recorded. This type of historical research focuses on describing events, people, or cultures in detail. It can involve examining artifacts, documents, or other sources of information to create a detailed account of what happened or existed.

D. Analytical Research

This type of historical research aims to explain why events, people, or cultures occurred in a certain way. It involves analyzing data to identify patterns, causes, and effects, and making interpretations based on this analysis.

Unit Five Workshops

Task 01

Read Franklin D. Roosevelt's "Quarantine Speech" of October 5, 1937, and answer the following questions.

1. Develop a clear research problem or question inspired by Roosevelt's speech. Your problem should reflect a historical tension, controversy, or dilemma addressed in the speech, and it should be specific and researchable.
2. Analyze Roosevelt's speech using the document-analysis model studied in class.
3. Answer the following question in a paragraph: *Should the United States have intervened to help the Spanish Republic in its fight against fascism, or should it have remained neutral even if this meant the defeat of the Republic at the hands of the fascists?*
4. Base your analysis on at least **two secondary sources** and **two primary sources**.

Primary sources. Choose from the following or find your own:

- A newspaper article reacting to the speech or reporting on the Spanish Civil War
- A letter, speech, or memoir by a U.S. political figure or journalist on intervention in Spain
- A propaganda poster or photograph from the Spanish Civil War

Secondary sources. Choose from the following:

- A scholarly article or book excerpt analyzing U.S. foreign policy in the 1930s
- A textbook chapter on the American Neutrality Acts
- A documentary or academic essay on Roosevelt's foreign policy or on the Spanish Civil War

Task 02

The Prophet Muhammad (peace be upon him) is depicted among the great lawgivers of history in the marble frieze of the U.S. Supreme Court courtroom, sculpted by Adolph A. Weinman in the 1930s. Analyze this artistic frieze in relation to its historical context (the Great Depression, Franklin D. Roosevelt's New Deal, the rise of dictatorships in Europe and Asia, and the Jim Crow laws). Use two primary sources and two secondary sources.

Task 03

The following excerpt is taken from the historiography section of the dissertation "The Role of Pro-Gun Organizations in Promoting Gun Culture in the United States and the United Kingdom" by Abid Doua and Sakala Nihad.

Historiography excerpt

To shape knowledge about this topic, various sources, including articles, studies, and videos, were consulted. This was essential in formulating the initial plan for this research. Given the persistent debate surrounding guns, their culture, and legislation in the UK and especially in the US, a rich body of scholarship has been devoted to the subject. One of the academic works was Allan I. Morris's "In Defense of Security, Liberty, and Property: The English Origins of an Individual Right to Bear Arms" (2019). In his thesis, Morris delved into the historical roots of an individual right to bear arms in England, tracing its origins back to the seventeenth century. He argued that English Whig theorists, including Harrington, saw armed citizenry as a crucial defense against oppressive governments. Morris bridged the gap to colonial America, arguing that the Founding Fathers, well-versed in English arguments supporting individual arms rights, embedded those concepts into the Second Amendment. Morris ultimately presented a compelling case that the individual right to bear arms has strong historical foundations in English ideas about liberty and resisting tyranny. Another significant work was Frederic Lemieux's "Effect of Gun Culture and Firearms Laws on Gun Violence and Mass Shootings in the United States: A Multi-Level Quantitative Analysis" (2014). In his study, Lemieux investigated the relationship between Gun Culture and gun laws and their correlation with gun violence and mass shootings in the United States. He posits two hypotheses: first, that gun violence and mass shootings are culturally driven, and second, that they are exacerbated by lax regulations. To test the validity of his hypotheses, he conducted a three-level, cross-sectional analysis and briefly compared the US in terms of the rate of death by guns and the rate of gun ownership to twenty-five other developed nations, including the UK. Lemieux found out that both cultural and legislative factors have significant effects on gun-related deaths and called for more restrictive gun regulations, stating "... more restrictive gun regulations will save lives above and beyond the issue of spontaneous mass shootings and can counterbalance the deadly effects of a violent gun culture" (91).

Another rich study was Peter Squires' book *Gun Culture or Gun Control? Firearms, Violence, and Society* (2000). From a criminological perspective, Squires explored the significant changes in British society following the 1996 Dunblane School shooting. He examined how the tragedy sparked a political debate that resulted in stricter firearm legislation in the UK. He then delved into the evolution of British gun laws, and highlighted the country's longstanding cultural ties to firearms, contrasting the UK's history with that of the US. Additionally, Squires shed light on the media's influence in shaping public perspectives on the gun control debate. He subtly examined the complicated matters around firearm policies by evaluating arguments from both sides of the debate, including individual liberties, collective security, and the potential impact of stricter controls on crime rates. Despite tracing back the right to bear arms in both the US and the UK, comparing each country's Gun Culture and discussing both countries' gun laws and regulations, the previously denoted works lacked the examination of the role of pro-gun organizations in promoting Gun Culture as well as their influence on the government policies and social attitudes. The two countries have well-structured gun organizations including the NRA and the BASC and their role and influence should be investigated. Hence, the following study will investigate and uncover the role of these organizations in advocating for gun ownership and their influence on the government and society.

Questions

1. Suggest a research problem that fits this historiography.
2. Pose suitable research questions, and then formulate pertinent research objectives.
3. In your opinion, which method(s) should the researcher use in this paper? Justify your answer.
4. Propose some types of primary sources on which the researcher is likely to rely in the argument.

Task 04

The following excerpt is taken from the Indictment of the major Nazi war criminals presented to the International Military Tribunal at Nuremberg (1945), Count Three: War Crimes.

The Nuremberg Indictment (excerpt)

Throughout the period of their occupation of territories overrun by their armed forces the defendants, for the purpose of systematically terrorizing the inhabitants, murdered and tortured civilians, and ill-treated them, and imprisoned them without legal process. The murders and ill-treatment were carried out by divers means, including shooting, hanging, gassing, starvation, gross over-crowding, systematic under-nutrition, systematic imposition of labour tasks beyond the strength of those ordered to carry them out, inadequate provision of surgical and medical services, kickings, beatings, brutality and torture of all kinds, including the use of hot irons and pulling out of fingernails and the performance of experiments by means of operations and otherwise on living human subjects. In some occupied territories the defendants interfered with religious services, persecuted members of the clergy and monastic orders, and expropriated church property. They conducted deliberate and systematic genocide, viz., the extermination of racial and national groups, against the civilian populations of certain occupied territories in order to destroy particular races and classes of people and national, racial or religious groups, particularly Jews, Poles and Gypsies and others.Civilians were systematically subjected to tortures of all kinds, with the object of obtaining information. Civilians of occupied countries were subjected systematically to 'protective arrests' whereby they were arrested and imprisoned without any trial and any of the ordinary protections of the law, and they were imprisoned under the most unhealthy and inhumane conditions. In the concentration camps were many prisoners who were classified 'Nacht und Nebel.' These were entirely cut off from the world and were allowed neither to receive nor to send letters. They disappeared without trace and no announcement of their fate was ever made by the German authorities.

Such murders and ill-treatment were contrary to International Conventions, in particular to Article 46 of the Hague Regulations, 1907, the laws and customs of war, the general principles of criminal law as derived from the criminal laws of all civilized nations, the internal penal laws of the countries in which such crimes were committed, and to Article 6(b) of the Charter. [...] [The particulars] in this count are set out herein by way of example only, are not exclusive of other particular cases, and are stated without prejudice to the right of the prosecution to adduce evidence of other cases of murder and ill-treatment of civilians. The most refined methods of cruelty were employed in this extermination, such as disembowelling and the freezing of human beings in tubs of water. Mass shootings took place to the accompaniment of the music of an orchestra recruited from the persons interned. [...] [The Germans undertook measures to hide] the evidence of their crimes. They exhumed and burned corpses, and they crushed the bones with machines and used them for fertilizer. [...] [In the Byelorussian] S.S.R., before liberation by the Red Army, the Germans established three concentration camps without shelters, to which they committed tens of thousands of persons from the neighbouring territories. They brought many people to these camps from typhus hospitals intentionally, for the purpose of infecting the other persons interned and for spreading the disease in territories from which the Germans were being driven by the Red Army.

Questions

1. Provide an internal criticism of this document.

2. Assess the actions and policies of the United States during and after the Second World War that may be viewed as contradictory to the principles upheld at the Nuremberg Trials. Mention specific examples, and discuss the **types of sources** you would use to support your argument.
3. In **a statement of the problem**, discuss the relevance of the Nuremberg Trials to contemporary international court proceedings concerning genocide, with particular reference to the case of alleged genocide against Palestinians, including similarities and differences in the legal, political, and social landscapes.
4. To **what type of historical topic** does this suggested research belong? Justify your answer.
5. What **challenges and limitations** might researchers face when researching this topic?

Task 05

Working in groups of three, develop a research proposal on **one** of the following topics:

1. The Impact of Operation Torch on Algerian Culture: The Anglo-American Presence in North Africa during World War II
2. The Roots of the Separatist Movement in Texas and Biden's Reaction to It
3. The Berlin Wall and the US–Mexico Border Wall as Strategies to Limit Illegal Immigration
4. Exploring Neo-Orientalism in CNN's Coverage of Trump's 2017 Muslim Ban
5. From Salem to Surveillance: The Legacy of Fear and Accusation in American Policy

Task 06

Read the following excerpt from Arthur Miller's *The Crucible* (Act IV).

Arthur Miller, *The Crucible*, Act IV

Proctor has just finished signing when Danforth reaches for the paper. But Proctor snatches it up, and now a wild terror is rising in him, and a boundless anger.

DANFORTH *(perplexed, but politely extending his hand)*: If you please, sir.

PROCTOR: No.

DANFORTH *(as though Proctor did not understand)*: Mr. Proctor, I must have—

PROCTOR: No, no. I have signed it. You have seen me. It is done! You have no need for this.

PARRIS: Proctor, the village must have proof that—

PROCTOR: Damn the village! I confess to God, and God has seen my name on this! It is enough!

DANFORTH: No, sir, it is—

PROCTOR: You came to save my soul, did you not? Here! I have confessed myself; it is enough!

DANFORTH: You have not con—

PROCTOR: I have confessed myself! Is there no good penitence but it be public? God does not need my name nailed upon the church! God sees my name; God knows how black my sins are! It is enough!

DANFORTH: Mr. Proctor—

PROCTOR: You will not use me! I am no Sarah Good or Tituba, I am John Proctor! You will not use me! It is no part of salvation that you should use me!

DANFORTH: I do not wish to—

PROCTOR: I have three children—how may I teach them to walk like men in the world, and I sold my friends?

DANFORTH: You have not sold your friends—

PROCTOR: Beguile me not! I blacken all of them when this is nailed to the church the very day they hang for silence!

DANFORTH: Mr. Proctor, I must have good and legal proof that you—

PROCTOR: You are the high court, your word is good enough! Tell them I confessed myself; say Proctor broke his knees and wept like a woman; say what you will, but my name cannot—

DANFORTH *(with suspicion)*: It is the same, is it not? If I report it or you sign to it?

PROCTOR *(he knows it is insane)*: No, it is not the same! What others say and what I sign to is not the same!

DANFORTH: Why? Do you mean to deny this confession when you are free?

PROCTOR: I mean to deny nothing!

DANFORTH: Then explain to me, Mr. Proctor, why you will not let—

PROCTOR *(with a cry of his whole soul)*: Because it is my name! Because I cannot have another in my life! Because I lie and sign myself to lies! Because I am not worth the dust on the feet of them

> that hang! How may I live without my name? I have given you my soul; leave me my name!
>
> **DANFORTH** *(pointing at the confession in Proctor's hand)*: Is that document a lie? If it is a lie I will not accept it! What say you? I will not deal in lies, Mister!
>
> *Proctor is motionless.*

Questions

1. Examine this text as a historical document, paying particular attention to Arthur Miller's **purpose** in writing *The Crucible*.
2. What broader message is Miller conveying through Proctor's refusal to surrender his name?
3. Inspired by the thematic concerns of *The Crucible*, write **a brief statement of the problem** that explores the parallels between the **Salem** witch trials and at least one aspect of **contemporary** American hysteria.
   - 3.1. Based on your problem statement, propose (a) two **research questions** that could guide your investigation and (b) two corresponding **research objectives** that explain what your inquiry aims to achieve.
   - 3.2. Identify two **primary sources** you would use to investigate this problem, and describe how each source contributes to your research.
   - 3.3. As a student of civilization, what **precautions** should you take to avoid **confirmation bias** when researching this topic?

Task 07

Read the following excerpt from George F. Kennan's "Long Telegram."

861.00/2-2246: Telegram — The Chargé in the Soviet Union (Kennan) to the Secretary of State

Moscow, February 22, 1946—9 p.m. [Received February 22—3:52 p.m.]

In summary, we have here a political force committed fanatically to the belief that with US there can be no permanent *modus vivendi*, that it is desirable and necessary that the internal harmony of our society be disrupted, our traditional way of life be destroyed, the international authority of our state be broken, if Soviet power is to be secure. This political force has complete power of disposition over energies of one of world's greatest peoples and resources of world's richest national territory, and is borne along by deep and powerful currents of Russian nationalism. . . this is admittedly not a pleasant picture. . . but I would like to record my conviction that problem is within our power to solve – and that without recourse to any general military conflict. And in support of this conviction there are certain observations of a more encouraging nature I should like to make:

(1) Soviet power, unlike that of Hitlerite Germany, is neither schematic nor adventuristic. It does not work by fixed plans. It does not take unnecessary risks. Impervious to logic of reason, it is highly sensitive to logic of force. For this reason it can easily withdraw – and usually does when strong resistance is encountered at any point. Thus, if the adversary has sufficient force and makes clear his readiness to use it, he rarely has to do so. If situations are properly handled there need be no prestige-engaging showdowns.

(2) Gauged against Western World as a whole, Soviets are still by far the weaker force. Thus, their success will really depend on degree of cohesion, firmness and vigor which Western World can muster. And this is factor which it is within our power to influence.

(3) Success of Soviet system, as form of internal power, is not yet finally proven. It has yet to be demonstrated that it can survive supreme test of successive transfer of power from one individual or group to another. . .

(4) All Soviet propaganda beyond Soviet security sphere is basically negative and destructive. It should therefore be relatively easy to combat it by any intelligent and really constructive program.

For those reasons I think we may approach calmly and with good heart problem of how to deal with Russia. As to how this approach should be made, I only wish to advance, by way of conclusion, following comments:

(1) Our first step must be to apprehend, and recognize for what it is, the nature of the movement with which we are dealing. We must study it with same courage, detachment, objectivity, and same determination not to be emotionally provoked or unseated by it. . .

(2) We must see that our public is educated to realities of Russian situation. I cannot over-emphasize importance of this. Press cannot do this alone. It must be done mainly by Government, which is necessarily more experienced and better informed on practical problems involved. . . I am convinced that there would be far less hysterical anti-Sovietism in our country today if realities of this situation were better understood by our people. . .

(3) Much depends on health and vigor of our own society. World communism is like malignant parasite which feeds only on diseased tissue. This is point at which domestic and foreign policies meet. Every courageous and incisive measure to solve internal problems of our own society, to improve self-confidence, discipline, morale and community spirit of our own people, is a diplomatic

> victory over Moscow. . .
>
> (4) We must formulate and put forward for other nations a much more positive and constructive picture of sort of world we would like to see than we have put forward in past. It is not enough to urge people to develop political processes similar to our own. Many foreign peoples, in Europe at least, are tired and frightened by experiences of past, and are less interested in abstract freedom than in security. They are seeking guidance rather than responsibilities. We should be better able than Russians to give them this. And unless we do, Russians certainly will.
>
> (5) Finally we must have courage and self-confidence to cling to our own methods and conceptions of human society. After all, the greatest danger that can befall us in coping with this problem of Soviet communism, is that we shall allow ourselves to become like those with whom we are coping.

Questions

1. Examine this text as a historical document, paying particular attention to George Kennan's purpose in writing the "Long Telegram."
2. How similar are the policies proposed by Kennan to those set out in the Truman Doctrine and the Marshall Plan?
3. Inspired by the thematic concerns of the "Long Telegram," write **a brief statement of the problem** that explores the parallels between the original containment policy and at least one aspect of contemporary international relations (e.g., the response to Russia's invasion of Ukraine).
    - 3.1. Based on your problem statement, propose (a) two research questions that could guide your investigation and (b) two corresponding research objectives that explain what your inquiry aims to achieve.
    - 3.2. Identify **two primary sources and two secondary sources** you would use to investigate this problem, and describe how each source contributes to your research.

Conclusion

This course equips students with a comprehensive, interdisciplinary research toolkit—grounded in ethical rigor and methodological precision—for navigating both literary and historical inquiry. Participants master citation conventions and integrity practices, refine their information-literacy and note-taking strategies, and apply theoretical frameworks alongside digital humanities techniques for robust data collection. Through guided proposal development, students learn to articulate clear problem statements, engage critically with existing scholarship, and design sound research methodologies. The lessons on source criticism and analytical reporting cultivate sophisticated skills in evaluating and synthesizing both primary and secondary materials. Finally, collaborative workshops on project planning, peer review, and presentation prepare learners to communicate their findings effectively and to adapt to evolving academic paradigms. By the end of the course, graduates will be well prepared to undertake original research projects that bridge disciplinary boundaries, enrich cultural understanding, and make meaningful contributions to the fields of literature and history.

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