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The Use of Scholarly Monographs in the Journal Literature of Latin American History

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Abstract

This study explores the use of the monograph in the journal literature of Latin American history through a reference study of *Hispanic American Historical Review* for the years 1985, 1995 and 2005. The authors found that the use of monographs as secondary sources increased over time. Monographs in Spanish and Portuguese were heavily used, although English was the predominant language. Distribution of publication dates varied somewhat over the period, with less use of works from the previous five years in 2005. The most frequently-cited publishers were university presses. The authors concluded that the monograph continues to play a vital role in scholarly communication for researchers in Latin American history, and the field is vulnerable to any crisis experienced by university presses.

Introduction

In the past several years a crisis in scholarly communication has been observed by scholars and librarians. The crisis can be traced back to the early 1970's when library budgets were declining sharply from their heights in the 1960's, university funding for university presses was cut, and subscription prices for scholarly journals ballooned so that proportionally more of the library's limited materials budget was being spent on serials (Goellner 2002). Many have suggested that the monograph is now becoming obsolete, especially since today full-text journal articles are easy to access through aggregator databases or publisher Web sites. This study analyzes the role of the

monograph in the journal literature of a specific field, namely Latin American history, over a twenty-year period.

In 1997 publishers, librarians and scholars came together at a conference sponsored by the American Association of University Presses, the Association of Research Libraries and the American Council of Learned Societies. Several speakers presented papers from varied viewpoints addressing the issue of the endangered monograph. Humphreys (1997) emphasized the role of the monograph in academia. He pointed out that academic libraries were always the primary market for these monographs, but that in recent years fewer libraries are attempting to acquire new scholarly monographs in a comprehensive manner. He also pointed to several other problems, including pressure on new faculty to expand insufficiently substantial material into a book-length work and faculty's reluctance to purchase monographs that may not have lasting significance. Thatcher's (1997) presentation outlined the problems he faced when trying to publish monographs in the field of Latin American studies in the early 1990s. He was met with declining sales for some subfields of Latin American studies, including history, although others, such as political economy, were not so affected. He concluded that there is a wide gap between market value and scholarly value.

Many reference studies and citation analyses have addressed the role of the monograph within various disciplines; the current study sheds a little light on a less-explored subject area. This article should provide Latin American history or Latin American studies librarians with some insight on the use of monographs as secondary sources in the field of Latin American history.

Literature review

Citation studies can help librarians make informed collection development and management decisions because they provide insight into the actual sources used by researchers. Bowman (1991) gathered the results from published citation analyses and brought them together in one table to present an overview of thirty-four disciplines. By doing this, he was able to make some general statements, such as that the monograph is more important to the humanities than to the social sciences and hard sciences. However, perhaps because of the breadth and scope of the article, there is not enough data for the fields covered to do more than make generalizations.

Thompson (2002) discussed the crisis in scholarly communication for the humanities in some depth and analyzed the citation patterns in two subfields of literature. The results showed that the monograph is still the primary source of scholarly communication in those fields. Her research found that although there is an increase in the use of journal articles, these are not replacing the monograph in scholarly communication. In her study, she identified core groups of authors, works, journals,

and publishers. She found that the average age of monographs cited was thirteen years, while the dates ranged from very recently published to 167 years old.

Comparative articles such as the ones by Kellsey and Knievel (2004; Knievel and Kellsey 2005) give an overview of the humanities by analyzing subsets of the field. They are broad enough to include several disciplines, but narrow enough to provide accurate results for each of the disciplines covered. In Knievel's and Kellsey's (2005) study of monograph and article citations in eight humanities disciplines, they selected a journal that reflected each overall discipline, rather than subsets within it. In the case of history, they chose the *American Historical Review*. They looked at the format and language of citations in each journal over a year-long period and presented their results and conclusions on each different field. The results of their study demonstrate that in at least some fields of the humanities, particularly literature, history, music, and religion, monographs are still the most important vehicle for scholarly communication.

Kellsey and Knievel (2004) also explored the use of foreign language material in the humanities. The authors attempted to draw parallels between the decline of enrollment in foreign language university classes with a similar decline in the use of foreign language materials by scholars in four disciplines, including history. Although the results did not yield any evidence of such parallels, they did reveal that the percentage of foreign citations has decreased over time. This decrease, however, is due to the fact that the total number of citations has increased over time. In history in particular, more researchers are using foreign citations, as the number of articles without foreign citations decreased in the *American Historical Review*.

Articles that focus on specific subject areas can be even more helpful than comparative studies. They cover a single field, and this sometimes allows for a more exhaustive approach to the analysis of citations than could be possible otherwise. In a field such as history, a single-area study can be very helpful. The articles by Dalton and Charnigo (2004) and Lowe (2003) are examples of this more specialized approach.

According to Dalton and Charnigo (2004), historians continue to rely on books as the primary source of information. Dalton and Charnigo's research included both a survey of historians and a citation analysis conducted on selected books and journals from or around the years 1975 and 2001. They found that the gap between the numbers of journal citations and monograph citations seems to be decreasing, although books as the preferred sources of secondary information are still preferred overall.

Lowe's (2003) study attempts to find patterns in the field of history based on the number, language, date, format and number of authors found in the journal citations.

She analyzed four different years over a fifty-year period of the *American Historical Review* in order to cover the entire discipline. Although part of the study is an analysis of the format of the material cited, the results are not particularly conclusive. The author refers to the formats as serials vs. non-serials, and it is unclear whether non-serials refers solely to monographs or includes dissertations, book chapters, or other formats. However, her research does show the same conclusions reached by Dalton and Charnigo. Lowe also finds that more recent material is more heavily cited, although older material is cited as well, and that English-language publications make up most of the cited works.

The discipline of history can be too broad a subject of study. There are certainly many different types of history, not to mention different areas and periodizations, and even studies like the ones above can fail to determine the nuances inherent in the more specialized areas. The current article will attempt to fill that gap in the field of Latin American history and provide results that are specific and relevant to the field.

Methodology

The authors selected *Hispanic American Historical Review* (HAHR), one of the leading journals in the field of Latin American history, as the object of the study. According to *Magazines for Libraries*, HAHR “is one of the major publications in English on the topic of Latin American history” (Fladger and Wies 2004, 558). HAHR was founded in 1918 and is published by Duke University in cooperation with the Conference on Latin American History and the American Historical Association.

The authors looked at the citations in HAHR over two decades, using the years 1985, 1995, and 2005, with a particular focus on the citations to monographs used as secondary sources. All the articles in each issue for these years were used in the study. Articles were defined as those essays evincing original research and excluded interviews, book reviews, and notices. Articles which were reviews of the literature in a particular subject were also eliminated. The definition of a monograph was key to the study; published book-length treatises on a specific subject written for a scholarly audience were considered monographs. Edited works, essays within edited works, and other types of books were not considered monographs. Dissertations were eliminated since they have not been made available through the publication process.

All footnotes in each article were examined. Items cited were counted using the following categories: monographs, other books or parts of books, journal articles, theses and dissertations, and other (which included such items as archival materials, interviews by the author, and newspaper articles). In addition, the author, title, date of publication and language were collected for each monograph cited. The authors also determined for each monograph whether it was used as a primary or a secondary

source by considering the context of the citation. When an item was cited more than once within the same article, it was recorded each time. This method serves to give more weight within the results to the materials that were used more heavily by the author. Table 1 shows the number of articles from each year, the number of references, and the average number of references per article.

Table 1. Profile of articles from HAHR

	Articles (no.)	References (no.)	Average references per article (no.)
1985	13	2088	160.6
1995	12	2323	193.6
2005	12	2206	183.8

There are several limitations to this study, beginning with the use of only one journal to represent the field. However, HAHR is the most prominent journal in the field that is restricted specifically to Latin American history—other journals address the broader area of Latin American studies—so it should provide good representation of the field. Citations in this field are presented in numbered footnotes which frequently contain references to numerous items, making the data collection difficult and tedious. Another shortcoming is the difficulty in identifying a monograph based solely on a citation. An incorrect citation could lead to an item being incorrectly identified. The authors were obliged to exercise their judgment on which items were monographs, as well as in determining whether a monograph was being used as a primary or secondary source. Despite these limitations, the results of the study can be useful in illustrating the trends in scholarly communication, and particularly the use of monographs, in the field of Latin American history.

Results and discussion

Table 2. Formats of materials cited

	1985		1995		2005	
	no.	%	no.	%	no.	%
Monographs (secondary sources)	608	29.1	531	22.9	831	37.7
Articles	301	14.4	226	9.7	267	12.1
Other books, parts of books	122	5.8	205	8.8	196	8.9
Monographs (primary sources)	142	6.8	162	7.0	86	3.9

Dissertations/theses	54	2.6	32	1.4	26	1.2
Other	861	41.2	1167	50.2	800	36.3
Total	2088	100.0	2323	100.0	2206	100.0

Table 2 shows the breakdown of the citations by format for the three years examined, with the monographs category divided into monographs used as primary sources and monographs used as secondary sources. In this table, all citations in the article are included; multiple citations to the same source are each counted in order to provide a weighting for more heavily-consulted items. In 1985 monographs used as secondary sources constituted 29.1% of the sources cited and articles 14.4%. In 1995 monographs used as secondary sources constituted 22.9% of the sources cited, and articles only 9.7%. In this year the "other" category containing citations to archives, interviews, and other sources (principally primary sources) accounted for about half the citations. Finally, in 2005 monographs used as secondary sources comprised 37.7% of the sources cited and articles 12.1%.

According to these results, the use of the scholarly monograph as a secondary source decreased from 1985 to 1995 but increased substantially from 1995 to 2005. The use of the scholarly monograph as a primary source has decreased, although this result may be influenced by the type of research undertaken. The level of use of articles declined from 1985 to 1995 and rose again between 1995 and 2005, but not to the former level. The results also show variations in the level of use of other primary materials such as archival documents. Overall, the ratio of scholarly monographs as secondary sources to articles in 2005 was approximately three to one. This is comparable to the results found by Knievel and Kellsey (2005) when they examined citations in *American Historical Review* for 2002. They did not count archival materials, and their results showed 76.4% of the citations were to monographs and 23.3% to articles, also a three-to-one ratio.

Table 3. Language of cited monographs used as secondary sources

	1985		1995		2005	
	no.	%	no.	%	no.	%
English	120	37.4%	200	63.3%	261	58.1%
Spanish	150	46.7%	84	26.6%	152	33.9%
Portuguese	30	9.3%	28	8.9%	32	7.1%
Other	21	6.5%	4	1.3%	4	0.9%
Total	321	100.0%	316	100.0%	449	100.0%

From this point forward in the analysis, duplicate citations to monographs used as secondary sources within the same article are eliminated; each monograph is counted only once per article. The totals in table 3 show that a similar number of works were cited in 1985 and 1995, but the number of works cited in 2005 shows a significant increase over the earlier years. A profile of the languages of these monographs is also shown. English, Spanish, and Portuguese are the most common languages, with the "other" category representing works in Catalan, French, German, and Italian. English is the most common language overall, with Spanish a strong second, although Spanish-language monographs outnumber English-language monographs in 1985. Since the field under consideration is Latin American history, it is not surprising to see strong use of materials in Spanish and Portuguese. The use of Portuguese materials has remained fairly steady, while the use of monographs in "other" languages has declined. Kellsey and Knievel's (2004) study of the use of foreign-language materials by humanities scholars found a greater use of English-language materials by history scholars; again, this is not surprising since the current study is focusing on the specialized field of Latin American history.

Table 4. Distribution of cited monographs by date of publication

	1985		1995		2005	
	no.	%	no.	%	no.	%
More than 50 years	29	9.0%	29	9.2%	27	6.0%
Previous 41-50 years	17	5.3%	13	4.1%	25	5.6%
Previous 31-40 years	22	6.9%	23	7.3%	44	9.8%
Previous 21-30 years	34	10.6%	56	17.7%	78	17.4%
Previous 11-20 years	95	29.6%	71	22.5%	139	31.0%
Previous 6-10 years	67	20.9%	72	22.8%	90	20.0%
Previous 5 years	50	15.6%	48	15.2%	34	7.6%
No date	7	2.2%	4	1.3%	12	2.7%
Total	321	100.0%	316	100.0%	449	100.0%

Figure 1. Distribution of cited monographs by date of

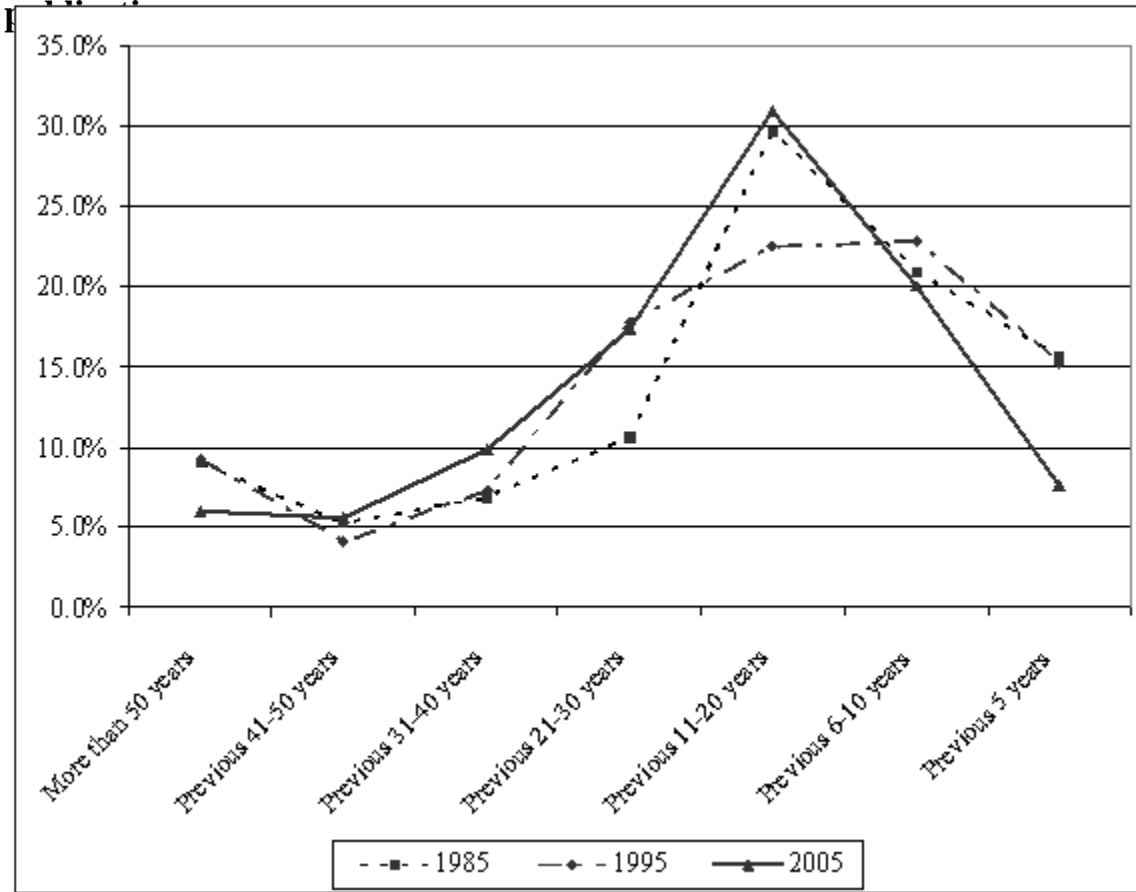


Table 4 shows the breakdown of the monographs used as secondary sources by their publication date. In 1985 the cited monographs were published primarily in the previous twenty years. The pattern has certain similarities to the distribution for 1995. Authors in 2005 did not cite as many monographs from the preceding five years, but the number from the preceding six to ten years was similar. Figure 1 provides a graphical representation of the data. The shapes of the lines are quite similar except for the number of monographs from the previous 11 to 20 years in 1985 and the most recent five years in 2005. Authors of the articles from 2005 cited more monographs as secondary sources than the authors in other years, but they cited relatively fewer monographs from the most recent five years; this suggests that either fewer monographs were published during the period or that those published were not as useful to scholars.

Table 5. Distribution of cited monographs by country of publication

	1985	1995	2005

US and Canada			
US	90	150	209
Canada	0	2	3
Total	90	152	212
Latin America			
Argentina	53	12	15
Bolivia	5	0	5
Brazil	30	29	30
Chile	2	0	4
Colombia	0	2	11
Costa Rica	0	1	0
Cuba	7	0	6
Dominican Republic	0	17	0
Ecuador	0	6	6
El Salvador	0	1	0
Guatemala	0	1	1
Mexico	45	9	38
Nicaragua	0	1	3
Paraguay	1	0	0
Peru	19	1	24
Puerto Rico	0	17	0
Uruguay	2	0	0
Venezuela	0	1	3
Total	164	98	146
Europe			
France	11	2	4
Germany	5	0	2
Italy	1	0	0
Netherlands	2	0	0
Spain	20	17	34
Sweden	1	0	0
Switzerland	0	1	0
United Kingdom	22	40	39
Total	62	60	79
Asia			
China	0	2	0
Philippines	0	1	0

Total	0	3	0
No location	5	3	12

Table 5 provides a geographic breakdown of the country of publication of the monographs used as secondary sources. The greatest number originated in the United States, with several each year also originating in Brazil, Mexico, Spain, and the United Kingdom. A wide range of Latin American countries are represented; the particular combination each year is highly influenced by the choice of article topics represented.

Table 6. Distribution of cited monographs by region of publication

	1985		1995		2005	
	no.	%	no.	%	no.	%
US and Canada	90	28.0%	152	48.1%	212	47.2%
Latin America	164	51.1%	98	31.0%	146	32.5%
Europe	62	19.3%	60	19.0%	79	17.6%
Asia	0	0.0%	3	0.9%	0	0.0%
No location	5	1.6%	3	0.9%	12	2.7%
Total	321	100.0%	316	100.0%	449	100.0%

Table 6 summarizes the information and provides relative percentages. Latin America was the dominant source of monographs used as secondary sources in 1985, but the United States was the clear leader in 1995 and 2005. This echoes the information in table 3 regarding the language of the publications.

Table 7. Publishers with more than 5 monographs cited

1995		
Publisher	Country	No. times cited
Cambridge University Press	United Kingdom	17
Stanford University Press	USA	13
University of California Press	USA	12
Princeton University Press	USA	9
University of Chicago Press	USA	6
2005		
Publisher	Country	No. times cited
Stanford University Press	USA	26
Cambridge University Press	United Kingdom	18

Duke University Press	USA	17
University of California Press	USA	15
University of Texas Press	USA	14
Princeton University Press	USA	13
University of New Mexico Press	USA	13
University of Chicago Press	USA	9
Universidad Nacional Autonoma de Mexico	Mexico	7
Oxford University Press	United Kingdom	6
Colegio de Mexico	Mexico	6
Pontificia Universidad Catolica	Peru	6

Table 7 shows which publishers are represented most frequently among the publishers of monographs used as secondary sources. The citations in the 1985 articles generally did not include publisher information, so data for that year is not available. In both 1995 and 2005, university presses are clearly the predominant source for this type of monograph. It seems likely that any kind of crisis that affects the future of university presses may well have a negative impact on the continuing production of scholarly monographs in this field.

Table 8. Number of unique monographs, by number of articles where cited

	1985		1995		2005	
	no.	%	no.	%	no.	%
4	1	0.3%	0	0.0%	0	0.0%
3	1	0.3%	0	0.0%	1	0.2%
2	9	2.9%	4	1.3%	20	4.7%
1	296	96.4%	308	98.7%	406	95.1%
Total	307	100.0%	312	100.0%	427	100.0%

The authors then evaluated the extent to which individual monographs were cited by multiple articles. The results are given in table 8. The total number of unique monographs cited in 1985 was 307; in 1995 the number was 312, and in 2005 it was 427. Interestingly, there were very few cases of monographs being cited in multiple articles in the same year. For each year studied, 95% or more of the monographs were cited in only one article. The numbers of individual monographs cited in 1985 and 1995 were similar, with an increase in 2005. The collection of monograph authors whose works were cited in multiple articles was also examined. Enrique Florescano had works cited multiple times in both 1985 and 2005. David A. Brading had works cited multiple times in all three of the years examined, 1985, 1995, and 2005. All other monographs authors were cited multiple times in only one of the years studied.

Conclusion

The results of this study do not show evidence of a current crisis in the use of the monograph in scholarly communication in Latin American history. While the use of monographs as secondary sources declined from 1985 to 1995, it rebounded to a higher level in 2005. Both the number and percentage of citations to monographs increased over that period, and the number of unique titles represented by those citations increased as well. The results also show that scholars in 2005 used relatively fewer monographs from the previous five years than scholars in 1985 and 1995, and the best-represented publishers were university presses. These facts suggest that financial crises experienced by university presses which result in fewer monographs being printed could be having an effect on the availability of scholarly monographs in this field. While the use of monographs still seems robust, the continuing supply of new monographs may be declining.

Several areas of study could shed further light on the role of the monograph in Latin American history. The current study could be extended by examining additional years or by incorporating other journals within Latin American studies. An analysis of publisher output for the period could reveal trends in volume and subjects. A sample of monographs could be tracked to determine citation patterns over time; library holdings could be checked to determine their general availability to researchers.

The role of the monograph in Latin American history will continue to be of interest to scholars and librarians. Those librarians supporting collections in the field should be aware of the continuing importance of the monograph to researchers.

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