



Oral History Toolkit

Created by:

Jillian Decker (MA Public History)

Dory Klein (MLS, MA History)

Danielle Rose (MA Public History)

Northeastern University Library and Boston Public Library

Last Updated June 2021

Table of Contents

Oral History Association Core Principles	1
○ What is Oral History?	
○ Guiding Principles	
Oral History Association Best Practices.....	3
○ Preparation	
○ Interviewing	
○ Preservation	
○ Access & Use	
Information for Interviewers	9
○ Planning Your Oral History Project	
○ Before the Interview	
○ During the Interview	
○ After the Interview	
Information for Participants	22
○ Before the Interview	
○ During the Interview	
○ After the Interview	
Oral History at a Distance	26
○ Equipment	
○ Zoom Settings	
○ Pre-Interview Procedures	
○ During the Interview	
Forms and Checklists	33
○ Equipment Checklist	
○ Consent and Release Form	
○ Pre-Interview Template	
○ Interview Log Template	
○ Interview Metadata Form	
Glossary	41
Learn More.....	45
○ Books	
○ Scholarly Articles	
○ Online Resources	

BPL/BRC Oral History Toolkit

How Do I Use This Toolkit?

This toolkit offers best practices, tips, and tools to help you plan and implement your oral history project. While this document was developed for members of the Boston Public Library community engaged in collaborative oral history, it is designed with the hope that it will prove relevant to oral historians of varying experience levels and their partners within Greater Boston's libraries, archives, and museums. This toolkit also includes information for participants, as well as a release form and other documentation materials necessary to an oral history project.

Note that there's no one-size-fits all approach to oral history; flexibility is key as you approach your project. As such, this toolkit should be considered a handy guide, and not a stringent set of rules.

Oral History Association Principles & Best Practices

The Oral History Association (OHA) is the primary professional organization devoted to oral history. OHA has established a set of goals, guidelines, and evaluation standards for oral history interviews; we have reproduced these principles in this toolkit as they provide a valuable framework for planning your oral history project.

OHA Core Principles

The Core Principles of the Oral History Association

1. The Oral History Association, in both its national and regional professional organizations, brings together practitioners from a variety of communities, backgrounds, and academic and professional fields, including many who might not label themselves oral historians. Nevertheless, whether motivated by scholarly research questions, political or social change goals, efforts to preserve history, pedagogical aims, or any other purpose, oral history practice shares common principles. This document lays out some of those guiding principles, keeping in mind the diverse practices of those involved in the collection, interpretation, use, and preservation of oral history.

What is Oral History?

2. **Oral history refers to both the interview process and the products that result from a recorded spoken interview** (whether audio, video, or other formats). In order to gather and preserve meaningful information about the past, oral historians might record

interviews focused on narrators' life histories or topical interviews in which narrators are selected for their knowledge of a particular historical subject or event. Once completed, an interview, if it is placed in an archive, can be used beyond its initial purpose with the permission of both the interviewer and narrator.

3. **The value of oral history lies largely in the way it helps to place people's experiences within a larger social and historical context.** The interview becomes a record useful for documenting past events, individual or collective experiences, and understandings of the ways that history is constructed. Because it relies on memory, oral history captures recollections about the past filtered through the lens of a changing personal and social context.
4. The hallmark of an oral history interview is a dynamic, collaborative relationship between the interviewer and the narrator. **While interviewers pose questions based on research and careful preparation, narrators shape the interview based on what they deem to be relevant, meaningful, or appropriate to share.** Despite the fluid nature of the interview process, an oral history is grounded in thoughtful planning and careful follow-through of the agreed-upon process.

Guiding Principles

5. The oral history process, from the interview stage through preservation, use, and access, **must be guided by respect for narrators and the communities from which they come.** This means a commitment to an ethical process and to honoring diverse cultural values, ways of knowing, and perspectives.
6. The interview process must be **transparent**, with ongoing participation, consent, and engagement among all parties from the first encounter between interviewer and narrator to the creation of end products.
7. Oral history practitioners must be **sensitive to differences in power** between the interviewer and the narrator as well as divergent interests and expectations inherent in any social relationship. These dynamics shape all aspects of the oral history process, including the selection of people to interview, research questions, personal interactions during the interview, interpretations, decisions on preservation and access, and the various ways that the oral history might be used.
8. To the greatest extent possible, **both the narrator and the interviewer must be protected from harm**, particularly those who are vulnerable communities. This means that certain lines of inquiry or public access to completed interviews might be precluded. Any stipulations should be considered before the beginning of the oral history process

with the understanding that they can be renegotiated as the project proceeds.

9. Whenever possible, an oral history interview and its accompanying **documentation should be preserved and made accessible to other users**. Oral history practitioners must be clear on the various ways the interview might be preserved, made available, and used. Likewise, narrators must grant explicit permission to make their interview public, and when possible, should be given an opportunity to establish parameters for preservation, access, and use.
10. While oral historians are bound by laws covering copyright, and in some institutions might be bound by regulations governing research involving living human subjects, their responsibilities also go beyond these official rules. They should conduct themselves ethically and thoughtfully and be vigilant about the possible consequences to narrators and their communities of both the interview process and the access/use of completed interviews.

Source: Oral History Association, "OHA Core Principles," 2020,
<https://www.oralhistory.org/oha-core-principles/>.

OHA Best Practices

Four key elements of oral history work are preparation, interviewing, preservation, and [access](#). Oral historians should give careful consideration to each at the start of any oral history project, regardless of whether it is comprised of one or many interviews. This brief document presents the Oral History Association's guidelines for how to conduct a high-quality oral history interview;[\[1\]](#) it highlights some standard practices that should help produce historically valuable and ethically conducted interviews.

Preparation

1. First-time interviewers and others involved in oral history projects should seek training,[\[2\]](#) whether they are conducting individual research or developing a community or an institutional project.
2. During initial preparation, oral historians should **locate an appropriate repository**[\[3\]](#) to house the project's finished oral histories and other documentation. Oral historians should take care to select a repository that aligns with the project's goals, has the capacity to preserve the oral histories, can enforce[\[4\]](#) any [signed agreements](#), and will make them accessible to the public.

3. Oral historians should **outline an oral history process** appropriate for their projects and their narrators. They should consult the complete suite of [Oral History Association Principles & Best Practices](#) documents for guidance, but whenever possible, the process should include the following: obtaining and documenting the [informed consent](#) of the narrator; when possible providing the narrator an opportunity to approve the oral history prior to public release; and sharing expectations about the overall project timeline. At this stage, the oral historian also should develop [forms](#) appropriate for documenting the process and related agreements.
4. Oral historians should choose potential narrators based on the relevance of their experiences to the subject at hand, while striving to identify and incorporate as many [diverse voices](#) as possible.
5. The process of engaging with potential narrators can be relatively simple and brief or involve multiple conversations.^[5] The process typically entails two facets: first, describing the project and process and securing the informed consent of the narrator and second, holding a pre-interview discussion to assist in the interviewer's preparation. These meetings, regardless of their formality, are important in establishing rapport between interviewer and narrator and allowing for clear communication of the following elements:
 - a. The oral history's purposes in terms of topics to be covered and general research questions under study, and reasons for conducting the interview
 - b. The full oral history procedure, including when and how the interview will be recorded, a description of any review process, the plans for preservation and access, the potential uses of the oral history, and the need for informed consent and other legal forms to be signed
 - c. The narrator's expectations for the oral history—what they want to get out of the process, what topics are meaningful to them, and what questions they should be asked
 - d. When an understanding on how to proceed is reached, a formal record of that agreement should be completed prior to^[6] the beginning of recording
6. In preparing to ask informed questions, interviewers should become familiar with the person, topic, and historical context by doing research in primary and secondary sources, as well as through social engagement with individuals and communities and informal one-on-one interactions.
7. Interviewers should create, when possible, a high-quality recording of the interview(audio or video format) to capture the narrator's interview accurately with consideration of future audiences and long-term preservation.

8. Interviewers should prepare an open-ended guide^[7] or outline of the themes to be covered and general questions to be asked before conducting the interview. Interviewers should educate themselves about different interviewing strategies with the goal of encouraging the narrator to provide the fullest responses to the questions as possible. (See interviewing section below for more details.)
9. Oral historians should recognize that their narrators are not just isolated individuals; they are members of communities, some of whom have historically complex relationships with researchers. When planning an oral history project, interviewers are advised to think about whether they want to engage with those communities in a formal, organized way. Oral historians may decide to develop a plan for community engagement that benefits both the project and the community. These plans for bringing communities into the oral history process might include the creation of a community advisory board, hosting events for sharing research findings, providing oral history training, and more.

Interviewing

1. The interview should be conducted, whenever possible, in a quiet location with minimal background noises and possible distractions, unless part of the oral history process includes gathering soundscapes or ambient sounds.
2. The interviewer should record a lead-in at the beginning of each session. It should consist of contextual information,^[8] such as:
 - a. names, or when appropriate, pseudonyms, of narrator and interviewer;
 - b. full date (day, month, year) of recording session;
 - c. location of the interview (being mindful to not list personal residence address, but rather generic “narrator’s home”); and
 - d. proposed subject of the recording.
3. Both parties should agree in advance to the approximate length of each interview session. Given the unpredictability of the setting, however, the interviewer should be flexible and prepared for the session to be cut short, interrupted, or possibly to run long, if both parties agree.
4. Along with asking open-ended questions and actively listening to the answers, interviewers should ask follow-up questions, seeking additional clarification, elaboration, and reflection. When asking questions, the interviewer should keep the following in mind:
 - a. Interviews should be conducted in accord with any prior agreements made with the narrator, and interviewers must respect the rights of interviewees to refuse to discuss certain subjects, to restrict access to the interview, or, under certain

circumstances, to choose a [pseudonym](#). Interviewers should clearly explain these [options](#) and how they would be carried out to all narrators during the pre-interview.

- b. Interviewers should work to achieve a balance between the objectives of the project and the perspectives of their narrators. Interviewers should provide challenging and perceptive inquiry, fully and respectfully exploring appropriate subjects, and not being satisfied with superficial responses. At the same time, they should encourage narrators to respond to questions in their own style and language and to address issues that reflect their concerns.
 - c. Interviewers should be prepared to extend the inquiry beyond the specific focus of the project to allow the narrator to freely define what is most relevant.
 - d. In recognition of not only the importance of oral history to an understanding of the past but also of the cost[\[9\]](#) and effort involved, interviewers and narrators should mutually strive to record candid information of lasting value to future audiences.
5. The interviewer should secure a signed legal release[\[10\] form](#), ideally when the interview is completed. It is important to follow the guidelines of the partnering repository's policy on this, if relevant.

Preservation

1. Oral historians, [sponsoring institutions](#), and archival repositories should understand that planning for appropriate care and storage of original recordings begins with project conception.
2. Whenever possible and/or practical, oral histories—either individual or many within a project—should be deposited in a repository such as a library or archive that has the capacity to ensure long-term and professionally managed preservation and access. Regardless of where the oral histories ultimately reside,
 - a. the recordings of the interviews should be stored, processed, refreshed, and accessed according to established archival standards designated for the media format used;
 - b. whenever possible, all efforts should be made to preserve electronic files in formats that are cross platform and nonproprietary;
 - c. the obsolescence of all media formats should be assumed and planned for.
3. In the interim before deposit, oral historians should:
 - a. transfer the original recording from whatever device was used, make an appropriate number of redundant digital copies,[\[11\]](#) and store those in different physical locations, as soon as possible after any interview is completed;

- b. document their preparation and methods, including the project's context and goals, for their own, the project's, and the repository's files;[\[12\]](#)
- c. organize and preserve related material for each interview—photographs, documents, or other records such as technical or descriptive metadata—in corresponding interview files.

Access & Use

1. In order to enhance accessibility of the audio or audio/video files, an [archive](#) should provide, when possible, written documentation such as transcripts, indexes with time tags linking to the recording, detailed descriptions of interview content, or other guides to the contents.
2. Whatever type of repository is charged with the preservation and access[\[13\]](#) of oral history interviews, it should
 - a. honor the stipulations of prior agreements made with the interviewers or sponsoring institutions, to the greatest extent possible, including restrictions on access and methods of distribution;
 - b. evaluate documentation, such as consent and/or release forms, and if they do not exist, make a good faith effort to obtain them;
 - c. take all steps practicable to abide by any restrictions set forth by the narrator, while also making clear that certain legal challenges—such as subpoenas or open-record requests—may make some restrictions unenforceable;
 - d. be prepared to provide timely access to material with considerations for expectations of narrators or project partners;
 - e. when possible, consult project participants on how best to describe materials for public access and use.
3. All those who use oral history interviews after they are made accessible should strive for intellectual honesty and the best application of the skills of their discipline. This includes:
 - a. avoiding stereotypes, misrepresentations, and manipulations of the narrator's words;
 - b. striving to retain the integrity of the narrator's perspective;
 - c. recognizing the subjectivity of the interview, including, when possible, verification of information presented as factual;
 - d. interpreting and contextualizing the narrative according to the professional standards of the applicable scholarly disciplines;
 - e. contextualizing oral history excerpts;
 - f. providing a citation to the location of the full oral history.

[1] Before reviewing this document, please note: Many published and online sources offer further in-depth information about how to conduct an oral history interview. For more on finding the right guide for oral history see: Linda Shopes' list to [online web guides](#) and Barb Sommer's [reprinted from *The Oral History Manual, 3rd Edition* with publisher's permission] [bibliography](#)

[2] [OHA list of centers and collections](#) and [OHA list of regional and international organizations](#)

[3] Whether an institutional archive or a personal family archive. See more on the glossary term for [archive](#)

[4] For more on legal issues in oral history, see:

<http://ohda.matrix.msu.edu/gettingstarted/playlists/legal-issues/>

[5] Or involve multiple layers of gatekeepers or proxy's before reaching direct contact with potential narrator.

[6] Although many oral historians prefer to request signatures for any legal release forms assigning rights to the interview after it is completed in order to better address any sensitive issues that may have come up during the course of the interview.

[7] Linda Shopes' list to [online web guides](#) and Barb Sommer's [bibliography](#)

[8] This is with an understanding that in some cases, such as interviews with vulnerable communities, particularly those with surveillance concerns, there will be a need to gather only the very basic contextual information.

[9] In this sense, the "cost" of a project is more than just financial, for example, good relationship building with the community will involve the "cost" of the emotional labor involved for the interviewer, project manager, and/or team members, in creating understanding and trust.

[10] For more on legal issues in oral history, see:

<http://ohda.matrix.msu.edu/gettingstarted/playlists/legal-issues>

[11] <http://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/redundancy/>

[12] <http://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/metadata/>

[13] <http://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/access/>

Source: Oral History Association, "OHA Best Practices," 2020,
<https://www.oralhistory.org/best-practices/>.

Information for Interviewers

Planning Your Oral History Project

Careful planning is key to a successful oral history project. Before you jump into interviews, consider the following:

1. Determine your project goals. Consider:
 - a. Why is the project worth doing?
 - b. What is the main topic (or topics) that this project will explore?
 - i. What do you know about the subject? What don't you know?
 - ii. Is oral history the best way to gather the information you seek? Are there people you can interview who can tell you what you want to know?
 - c. What is your desired outcome from this project? For example, will the oral history interviews result in a print publication, an online exhibit, a school paper, or an informal oral presentation for loved ones? Are you recording these interviews to record your family stories?
 - i. One of your goals should be to achieve the best possible recording under the most favorable conditions to ensure that the interview can be duplicated and distributed and, as needed, upgraded to new formats.
 - ii. What will happen to your recordings when they are completed?
 - iii. What will you do with the information you learn from these interviews?
2. Learn about the work that is required for a typical oral history project. The following resources offer plenty of great information for novices and experienced oral historians alike:
 - a. Oral History Association (oralhistory.org)
 - b. Southern Oral History Program (<https://sohp.org/>)
 - c. Oral History in the Digital Age (<http://ohda.matrix.msu.edu/>)
3. Determine the scope of your project. Consider your project's:
 - a. Duration (remember to be flexible; oral history takes time!)
 - b. Location
 - c. Geographic range
 - d. Approximate number of people to be interviewed from one or more categories

Example: The scope of a hypothetical project could be summarized as one that is 6 months in duration; located in Dorchester, Boston, and nearby communities; and concerned with interviewing some of the staff and volunteers at the Federated Dorchester Neighborhood Houses (10 people in total).

4. Explore your own values, attitudes, assumptions, and other biases. Oral history doesn't call for an impossibly neutral interview, but it does require self-awareness and discipline.
5. Conduct preliminary research. Oral history cannot be independent from or substituted for other methods of historical research.
 - a. Has someone already conducted research on the topic or topics that interest you? If so, try to determine what work has been done and whether it makes sense for you to do additional work or, instead, choose a different topic that hasn't yet been explored.
 - b. Review published and unpublished material about your topic in order to learn more about it and, thus, prepare for your interviews.
 - i. Example: If you intend to interview a family member who performed at the Hi-Hat jazz club, it would be beneficial to read books and articles about the history of jazz in Boston, particularly those pertaining to the South End neighborhood. You may also wish to find recordings of performances, and a neighborhood historical society or local university may have relevant photographs, posters, and other records accessible in their archives; these sources can provide you with a fuller, more robust context for your interview.
 - c. Determine whether there are members of the community who have the information you are interested in discovering, and if they are willing and able to share it with you in a recorded interview. If no one has this information, or people are unable to share it for one reason or another, then your best course will be to select a different research topic.
 - d. If possible, develop a basic outline of the narrators' lives beforehand; a pre-interview discussion with your narrator is a great time to do this. They will likely cover much of their biographical information during the interview itself. However, understanding major life events or experiences can help you formulate your questions.
6. Determine who will work on the project.
 - a. Who will conduct the interviews?
 - i. Interviews should remain professional in nature, so it's important to pick an interviewer who knows the subject matter well, but isn't related to or have a history with the narrator.
 - ii. Interviews can be effective with two interviewers working together, and they should organize questions between them prior to the interview.
 - b. Do you need to establish a project leader who will coordinate the work of interviewers and others involved, and be responsible for answering questions about the project?
 - c. In addition to the interviewers, will you need to recruit others to operate audio or video recorders during the interviews?

- d. Who will organize the recordings and other materials that are generated by the project? It is important to label these materials, arrange them in a logical order, and place them in appropriate archival containers.
 - e. If family members lack the expertise needed to achieve the project's goals, will it be necessary to hire a qualified person?
- 7. Determine what will happen to the recordings and other documentary materials after the project comes to an end.
 - a. Should the materials be preserved and made available to other members of the community, researchers, and/or others? If so, would it be desirable to preserve the materials in a public repository, such as a library, archive or museum? Discuss this with prospective repositories at the start of the project because they may have specific requirements, such as the use of certain media for interviews and the use of certain release forms that will be signed by interviewers and interviewees.
 - b. It is strongly recommended that a repository be identified prior to beginning the project as the long-term cost of preserving oral history recordings is very high.
- 8. Create a release form. If you are working in partnership with a library or archives, use their release form. If you are working independently, you can use the [release form](#) in this toolkit as a template.
 - a. It is critical for oral history projects to use release forms, or deeds of gift, for the purpose of confirming that interviewees have given their consent to be recorded and for the recordings to be archived and/or used for research.
- 9. Determine what equipment, supplies and other resources you'll need.
 - a. What kind of recording equipment will you use?
 - b. What other supplies will you need? Some to consider: pencils, notepad, thumb drive, laptop, extra charger/batteries, wifi hotspot, phone with recording app for backup.
 - c. If interviewers need to travel, will they have access to automobiles or other appropriate modes of transportation?
 - d. Will there be a need for a secure storage space for the project's equipment and supplies?
 - e. Will you use a temporary digital storage space before your recording is moved to its permanent location?
- 10. Develop a timetable for your project.
 - a. When will it start? When will it end? Will there be important milestones, or phases, along the way?
- 11. Develop a budget.

- a. Create a detailed estimate of the cost of everything needed to accomplish the project. This includes the purchase or rental of recording equipment, supplies for the recording equipment, transportation expenses, archival supplies, office supplies, postage, professional fees, and the cost of creating any sort of product that is desired (e.g., print publication, online exhibit, etc.).
12. Identify sources of funds.
 - a. If funds are needed to accomplish the project, where will they be obtained?
13. Publicity.
 - a. Consider ways to inform community members about the project. They might include a social media post, e-newsletter announcement, flyers, etc.

Adapted from “Oral History Interviews,” *Oral History Interviews: Family History and Folklife* (The American Folklife Center, Library of Congress), 2015,
<https://www.loc.gov/folklife/familyfolklife/oralhistory.html>.

Before the Interview

Create an Interview Outline

- Let your research guide you! Before sitting down with your narrator, create a list of key terms and phrases relating to the information you would like to learn. This outline will in turn guide your interview.

Tip: Drafting a list of specific questions ahead of time may feel too scripted and rigid, preventing your narrator from being fully candid and preventing you from following up for details. Instead, compose questions around your key terms and phrases to help your narrators recall the past and share their stories.

- A pre-interview conversation with your narrator will help both of you map out your expectations, test your technology, and unearth some avenues for inquiry.
- Your narrator may want to know what you’re planning to ask ahead of time. You can share a list of questions or topics you plan to cover; this will give them a sense of structure, stimulate memories, and help build trust.
- During the interview, your narrator may offer information that wasn’t on your topic list but merits further investigation. That’s okay! That’s great! You can ask follow up questions, and once you’ve covered the new topic to your satisfaction, you can return to your list to move on to the next topic. Remain flexible and treat your topic list as a road map; you

have a destination in mind, but it's okay (and encouraged!) to explore and take the scenic route along the way.

Example

An oral history with a lifelong resident of Egleston Square in Boston's Jamaica Plain neighborhood may generate an outline that looks something like this:

Egleston Square

- Description (geographical boundaries)
- Origin of name
- Earliest memories
- What was there: residences, businesses, schools, churches, parks, historic sites
- How people got around, modes of transportation
- Times people got together: when, where, why (politics, sports, play, social life)
- Racial, ethnic, economic makeup of neighborhood
- Neighborhood leaders, characters
- Relationship to city and surrounding neighborhoods; reputation within the city
- Celebrations (holidays, rites of passage)
- Safety (health, crime, environmental concerns)
- Effects of Great Depression, WWII, urban renewal, highway construction, Blizzard of '78
- Changes over time

Adapted from Baylor University Institute for Oral History, "Creating an interview outline," *Workshop on the Web: Introduction to Oral History*, 2012, <https://www.baylor.edu/oralhistory/>.

Pre-Interview

- An informal pre-interview conversation with your narrator will help both of you map out your expectations, test your technology, and unearth some avenues for inquiry.
- This conversation is not recorded and gives you and your narrator a chance to get to know one another, iron out the technical logistics of recording, ensure the informed consent of all participants, and is an opportunity for the interviewer to gather some biographical information that can inform your interview questions.
- If your interview is taking place remotely, whether via Zoom or another platform, review the [pre-interview procedures](#).
- Encourage the narrator to ask questions during this conversation (and any time!).
- At the end of the pre-interview, schedule the interview itself.
- You can use the [pre-interview template](#) in this toolkit as a guide.

Check Your Tech

Do a couple of test runs of your technology before conducting your interview; you'll want to do this before you travel and after you arrive to ensure that you are familiar with how your gear works, and that you can make appropriate adjustments in the interview setting. For information about remote interviews, see the [Oral History at a Distance](#) section of this toolkit.

Some considerations and questions to ask yourself:

1. Is your recording device charged? Do you have spare batteries and/or an extension cord? Do they work?
2. Test the recorder for a few seconds ("Testing 1, 2, 3"). Play it back: is there background noise or feedback?
3. Are you using a device with an audio monitor? If so, make sure you know [how to set your audio levels](#) prior to the interview.
4. What placement of the microphone produces the best audio? If you have a clip-on mic, consider in advance how to attach it to your interviewee's clothing in a way that is comfortable for both of you.
5. Plan for interruptions:
 - a. Unless they are being used for recording purposes, all phones should be off or in airplane mode.
 - b. If possible, avoid squeaky chairs or chairs on wheels.
 - c. If possible, avoid fidget devices, including papers, cell phones, snacks, or cups (that being said, you may wish to have water available for both interviewer and interviewee).
 - d. If there's a risk of surprise visitors, close the door to the interview room and tape a cautionary sign (e.g., "Interview in process").
 - e. Consider the environment, and plan with your interviewee. Do they have a noisy fan, refrigerator, radiator, or similar? Is their spouse watching TV in the next room? Are there ways to mitigate these environmental interruptions? If you need to turn off or unplug an appliance in your interviewee's home, do so only with your interviewee's consent and comfort; explain your reasoning, and ask politely. Always make sure that you leave their home as you found it (if you unplug the refrigerator, make sure you plug it back in before you leave!).
6. Where will your interviewee be in the frame of your video? What looks the best? Keep in mind that your interviewee may shift in their chair, and if you don't have a designated camera operator, they may move out of the frame.
7. If you are just recording audio and not video, keeping the recorder out of sight of the narrator can help them feel more comfortable. However, it should always remain in the interviewer's sight.
8. How is the lighting? Standing and table lamps are preferable to overhead lights, which can cast a harsh glow. It may seem counterintuitive, but natural light from a window is

not your friend; rather than risk the possibility of clouds blocking the sun halfway through your interview, you may wish to close the blinds or curtains if possible.

9. Depending on your recording media, how will you know to switch the tape/SD card?
10. Do you have enough storage space on your device? What are you using for backup storage?

Learn more:

[Digital Audio Recording: The Basics](#) by Doug Boyd, *Oral History in the Digital Age*

A rundown of digital recording technology and procedures.

[Quick Tips for Better Interview Video](#) by Scott Pennington and Dean Rehberger, *Oral History in the Digital Age*

Useful tips for capturing a high quality video recording of your interview; many of these suggestions are useful whether you're recording in person or remotely, via Zoom or another platform.

Informed Consent

Before your interview, review the [Information for Participants](#) section of this toolkit with your narrator. The entire oral history process should be transparent, with continued trust, participation, and consent of all parties involved.

By recording your interview, you and your narrator are creating a unique work. You both should understand your rights as co-creators of a recorded interview, as well as the purpose of this project and potential outcomes (how the recording and transcript may be used). All parties should understand the interview process, as well as potential benefits and risks of participation. All parties should have a clear sense of what your project entails, how the ensuing materials will be made available to researchers (if at all), and what it means to consent to an interview.

Once the interviewer and narrator have reviewed this information, both parties should sign the [Consent and Release form](#); if you plan to submit your recordings and related materials to Northeastern University Archives & Special Collections, then you should use the form available in this toolkit. If you do not wish to partner with NUASC, you can create your own consent form. You are welcome to use the form in this toolkit as a template; you may also find inspiration from other oral history projects. [The oral history agreement found here](#) has been used by oral historians affiliated with Columbia University; please note that these forms in no way constitute legal advice.

During the interview

Composing Questions

While you may craft some questions in advance, remember that flexibility is your friend, and your narrator may take your interview in some interesting directions. Using your interview outline as a road map, compose questions on the spot; this allows you to adapt your questions to the narrator's experience and flow of the interview.

Ask open-ended questions

Tell me about...

Why...? Why not...? How did...?

Probe for details

Explain...

Describe...

What was it like when...?

Can you tell me more about...?

How often did...?

Can you share examples of...?

Avoid loaded and leading questions

Be mindful of your biases. Don't suggest that you've already answered the question in your head.

Instead of: Wasn't Jamaica Plain a great place to grow up?

Try: Tell me how you felt about the place where you grew up.

Instead of: Your family moved away because of rent hikes, right?

Try: Why did your family move away?

Instead of: I assume your family kept kosher. What was that like?

Try: Can you tell me about the role of religion in your family life?

Restate or summarize

You said... Tell me more about that.

Let me say that back to you and make sure I understand. You said... Is that right?

Ask for definitions and clarifications

Tell me what... means.

What is...?

I know what... is, but future researchers might not. Can you please tell me what it was and how it was used?

Follow up

What else...? Who else...? What other reasons...?

Flip things around

Some people say... What do you think about that?

Adapted from Baylor University Institute for Oral History, "Composing questions," *Workshop on the Web: Introduction to Oral History*, 2012, <https://www.baylor.edu/oralhistory/>.

Tips for Interviewers

1. Choose a quiet location and properly position your recording devices.
2. Consider using "memory cues" such as photographs, posters, scrapbooks, and newspaper clippings.
3. At the start of the recording, begin with a brief announcement that specifies the date and location of the interview, names of the interviewer and narrator, and general topic of the interview.
Example: "Today is Friday, July 31, 2020, and this is the start of an interview with Joan Simons at her home at 700 Boylston Street, in Boston, Massachusetts. My name is Rose Harris and I'll be the interviewer. This interview is being done in connection with my thesis about the history of student resistance in Boston, with a focus on the roles played by women. Today we'll mainly be talking about Ms. Simon's recollection of the protests against the Vietnam War during her time at Boston University in the 1960s."
4. Ask questions that require more of an answer than "yes" or "no." Start with "why," "how," "where," "what kind of ..." See [Composing Questions](#) for more tips on crafting thoughtful questions.
Instead of: "Did you go to Sunday school?"
Ask: "What do you remember about Sunday school?"
5. Ask one question at a time. State your questions as directly as possible. Trust your narrator to understand your question and give them space to answer.
Instead of: "Did you walk to school? Or did you take the bus? Did you know anyone with a car? Did they even have cars back then?"
Ask: "How did you get to school?"

6. Start with questions that are not controversial or difficult; save the more sensitive questions, if there are any, until you and your narrator have reached a comfortable stride. A good place to begin is with the narrator's childhood and background. You may also consider distributing sensitive questions throughout the interview, with breaks for easier questions, rather than clustering them together.
Tip: If a narrator needs some encouragement, remind them that their interview will help researchers learn more about their world. For example, "A future historian listening to this interview would want to know..."
7. Periods of silence are natural; don't let them fluster you. Give your narrator time to fully answer one question before you move on to the next. Take a breath and use the opportunity to write a few notes.
8. Don't worry if you stumble over some of your questions. You are not perfect and neither is your narrator! Some false starts here and there may even help put your narrator at ease.
9. Don't interrupt your narrator. If you think of new and exciting questions, need clarification, want to know how to spell something, etc., write them down so you remember to raise them when appropriate.
10. Don't argue with your narrator. If they make a statement that you believe to be untrue, try to gather more information. Walter Lord, who famously interviewed survivors of the *Titanic*, observed that nearly everyone interviewed asserted that they had escaped the sinking ship on the last lifeboat. Knowing that this could not be true for everyone, he later studied the placement of the lifeboats, and discovered that none of the lifeboats were in view of any of the others; in all likelihood, each narrator was in the last lifeboat that they could observe as they left the ship (source: Minnesota Historical Society Oral History Office, "Oral History Project Guidelines," 2001; Walter Lord, *A Night To Remember*, 1955).
11. Avoid "off the record" information or switching the recorder off and on, as this can set a disruptive pattern. Assure the narrator that sensitive information may be restricted, and note the time codes.
12. If your narrator strays into subjects that are not pertinent to your research, gently guide them back to the topic with your next question. But be flexible! You may learn something of value through a story that may at first feel tangential.
Try: "Before we move on, I'd like to hear about how the closing of the department store in 1933 affected your family's finances. Do you remember that?"
13. Try to establish at every important point in the story where the narrator was or what role they played in the event, in order to indicate what is eye-witness information and what is

based upon reports of others. Ask these questions carefully, so that you do not appear to doubt the accuracy of the narrator's account.

Try: "Where were you at the time of the molasses disaster?"

Try: "Did you talk to any of the survivors later?"

14. Make the recording as complete and accurate a record of the interview as you can. If you are using only an audio recorder, remember that it has no visual aspect. If the narrator makes a significant gesture, follow up with a question that allows the information to be captured on the recording verbally.

Example: The narrator holds her hands apart and says, "The fish was about this long." The interviewer follows up: "So, was it about three feet long?"

15. Respect your narrator. They are sharing the gift of their time and their memories. Use positive body language and give them your full attention during the interview.

16. End the interview at a reasonable time. An hour and a half is probably the maximum. Sharing memories can involve a great deal of emotional labor; you don't want to fatigue your narrator or yourself.

17. Include a brief ending announcement at the end of the interview.

Example: "This is the end of the July 31, 2020 interview with Joan Simons. The interviewer was Rose Harris."

18. End with gratitude. Thank your narrator for sharing their time and their past with you.

19. Don't use the interview to show off your knowledge, conversation skills, or other abilities. Remember: good interviewers don't shine; only their interviews do!

After the Interview

1. If your narrator isn't too fatigued, ask them to verify the spellings of recurring names (people, places, etc.) of which you are uncertain. You can also reach out later, but it's often easier to refine these details when the interview is still fresh in everyone's memory.
2. Before leaving, pack up your equipment; use the equipment checklist as your guide.
3. If interviewing in the narrator's home: Did you move furniture or unplug a noisy appliance? Be sure to leave their space as it was when you arrived!
4. Make sure that your narrator has signed the release form, if they haven't done so already.

5. Save the recording in more than one location.
 - a. Remember the concept of LOCKSS: Lots Of Copies Keep Stuff Safe. Keep multiple copies of your files on different storage media to ensure that your files are preserved.
 - b. If using a recording device: transfer the unedited, original audio recordings from the memory card to a computer hard drive as soon as possible after the interview. Check to make sure that the computer's hard drive has sufficient capacity for the files, which can consume a lot of space, and that the hard drive will be backed up regularly.
 - c. Save 3 copies of the recording on thumb drives or external hard drives. Consider saving another copy via a cloud-based service such as DropBox or Google Drive, but be aware that cloud storage may not be secure.
6. Review the recording, preferably the same day.
 - a. Complete the [interview log](#); you can find a template in this toolkit, under Forms and Checklists. This document outlines the interview, with a brief summary and a timestamp, much in the same way that a book's table of contents gives you a chapter title that directs you to the page number. This in turn provides an efficient and effective tool for researchers and archivists using this recording.
 - b. Complete the [interview metadata form](#); you can find a template in this toolkit, under Forms and Checklists. By succinctly listing important topics, people, places, and events covered in the interview, this document will help the archivist tasked with cataloging the recording, and subsequently making the recording more accessible to researchers.
 - c. Are there glitches, redactions, moments in need of clarification?
7. Send the narrator a thank-you note.
8. Label your recordings, notes, forms, and any other materials legibly and consistently; this will help you manage these materials in the long term.
9. Decide how you will store and organize your recordings, transcripts, copies of release forms, notes, and other materials.
 - a. If you would like to deposit your oral history in a repository, start by talking to your [Boston Public Library branch librarian](#) or an archivist at a repository that holds similar collections. BPL staff may connect you with partners at Northeastern University:
 - i. [Northeastern University Archives & Special Collections](#) is actively collecting oral histories of Boston, with the twin aims of providing a safe and secure home for these cultural heritage resources and to make them more widely available.
 - ii. Northeastern is also home to the [Boston Research Center](#), a community history and digital archives lab with the mission of elevating Boston's

deep neighborhood and community histories through the creation and use of new technologies. The BRC may be able to offer direct help you with your project via:

- Long-term, non-commercial digital preservation
- Developing effective visualizations such as timelines, word maps, charts, and more
- Educational workshops on available digital historical tools
- Finding relevant data in historical maps, books, reports, and journal articles
- Connecting you with relevant collections of historical material

10. Transcription

- a. An interview transcript is a document that reflects the recorded interview verbatim. Transcribing an interview is labor intensive, but it is considered a best practice, as it provides researchers with an alternative, significantly easier, way to access and interpret the interview.
- b. You may manually transcribe interviews or pay for transcription services, either generated by people or AI. There are pros and cons to each approach.

Learn more:

[An Introduction to Oral History Transcripts and Transcription](#), by Andrea Eiding, *Unwritten Histories*

Offers an overview of transcription practices and reviews options for software and transcription services recommended by oral historians in the U.S. and Canada.

[Oral History Transcription Style Guide](#) by Columbia University Center for Oral History Research

Provides rules for spelling and punctuation useful in converting speech to written language and addresses issues common to the interview setting, such as interruptions, nonverbal sounds, and unintelligible speech.

11. It is a best practice to share a copy of the transcript with your narrator, allowing them to review for accuracy, make necessary corrections/clarifications, and occasionally, redact or restrict sections. Many oral historians also give their narrators a personal copy of the final transcript as an expression of gratitude for sharing their time and stories, and giving them a memento of the experience.
12. How are you going to use the interviews? An oral history interview isn't an end to itself; it is a primary source, or firsthand testimony created during a period in history. As you proceed with the "history making" -- the interpretation and analysis of the interviews -- consider ways to continue collaborating with your narrators.

Information for Participants

Thank you for sharing your time and memories; this project would not be possible without your participation. Prior to your interview, you should be aware of your rights as a narrator (also known as an interviewee); the following information should be made available to you in a language that you can read or speak fluently, or with the assistance of a trusted translator.

Before the Interview

1. Know the project background

The oral historian should make clear to you their motivations behind this project, as well as what they hope you will contribute. The oral historian or interviewer may ask you to make a formal declaration, either recorded or in writing, of your agreement to participate in this project and your understanding of the process. You should understand and feel comfortable with what this project aims to achieve.

2. Contact information

You should receive contact information for the following people: your interviewer; someone responsible for the archive where your oral history materials will be housed and/or made available for public access; and (if applicable) a project director and/or ethics committee contact.

3. The process for participation

The interviewer will explain to you the oral history process from start to finish. This explanation should include:

- a. How long your interview will take
- b. How it will be recorded
- c. Whether you will have the opportunity to review your recording, transcript, or other related materials before they are shared
- d. Your rights as a narrator; each of these points is covered in depth in this section of the toolkit:
 - i. Ownership of recorded words as an original and unique work of authorship
 - ii. To ask questions and receive answers about the project and process
 - iii. To refuse to answer certain questions or cover certain topics
 - iv. To withdraw from the project at any time
 - v. To review and edit transcripts
 - vi. To restrict use
- e. Any other details that may be relevant to the experience of being interviewed

- 4. The benefits of participation** Every oral history project is different; similarly, the benefits of contributing to an oral history project may be different for you than for another narrator. As a participant, you have the right to ask questions, discuss, and negotiate with the oral historian. Some potential benefits to participation may include the following:
- a. The project may align with your personal interests or goals.
 - b. You may be given copies of the interview and/or related materials to use or share.
 - c. Your community may be given special access to the records produced.
 - d. The oral history project may provide some other service to your community, like workshops or events.
 - e. There can be personal or intangible benefits, such as contributing to historical scholarship. This is your chance to add your lived experience and your truth to the historical record.

5. The potential risks of participation

In addition to the potential benefits, you may have concerns related to your participation. You should feel free to discuss these concerns in detail with your interviewer so that you can come to an informed decision before the interview begins. You are within your rights to ask questions, including what steps have been made to minimize the risk of physical, psychological, social, or economic harm to you. Standard oral history practice calls for making the interviews accessible to researchers and the general public, but you are free to request confidentiality or even to withdraw from the project at any point prior to its completion, or the time at which the material is made available (See “9. Altering or Withdrawing Your Oral History Interview” below).

During the Interview

6. The interview

An interview can feel like a conversation, although there are some important differences. Most interviewers will limit their own speaking so as to focus the interview on your experiences and your memories. At all times you are free to choose not to answer questions, to take a break from recording, or to end the interview. You are not required to discuss any topics that make you uncomfortable or cause you distress. The interviewer should not pressure you to change your mind, although they may ask you why you would prefer to not to speak about a particular subject in order to understand why you are choosing to avoid it. If the questions asked are not clear or seem irrelevant, you may ask for clarification. You should feel free to think about how you want to respond and take the time necessary to answer the question fully.

7. The recording process

The interview is recorded, sometimes with a simple audio recorder or perhaps with professional video recording equipment. Your interview may also take place remotely, using Zoom via a phone, computer, or other device. When applicable, your interviewer

will position the equipment to get the best possible recording. Work with them to ensure that you are comfortable throughout this process. While you might feel distracted by the recording equipment at the start of the interview, most participants feel more comfortable as the interview proceeds, and are able to easily focus on answering questions and sharing their stories.

After the Interview

8. The intended use of the interview

The oral history interview may result in materials such as an audio or video recording, a transcript of the recording, detailed notes on the information you provided, pictures of you, or other related records. These materials may be given to an archive or other repository to be housed long term and/or made available for public access. They may also be used in publications, websites, events, exhibits, and other public resources. The interviewer should explain to you the intended use of these materials, how they will be cared for, and how they may be accessed by others. Understand that these intentions are not a guarantee. The interview and related materials may never be used at all. Additionally, over the long term, there may be changes to how such materials can be made accessible to the public, preserved, or cared for as technologies and institutions change. In such cases, those responsible for the long-term care of your oral history materials should respect your initial intent for their use as much as possible. If the oral historian is aware in advance that such changes could take place, they should let you know.

From an archival perspective, cataloging oral history interviews requires great attention to detail and often takes a long time; it may take several weeks or months following your interview for it to become publicly accessible as part of a larger project or collection. However, after your interview, you are welcome to review your interview and/or make changes before it is shared with the public. This is addressed in greater detail in the section below.

9. Altering or withdrawing your oral history interview

When the interview finishes, you are welcome to raise questions or concerns about the interview or the oral history project. Know that you can restrict an interview from the public, make changes before it is shared, or withdraw your interview even after you have recorded your oral history interview and/or, in many cases, signed a formal agreement. Depending on the plan for long-term storage and access, this may be handled in a variety of ways. The oral historian should be able to share any information related to withdrawing your interview. Once an oral history is shared with the public, or entered into an archive, it may not be possible to fully remove it. Once an oral history is available to the public, a third party may quote, use, and reference it in another way that the oral historian has no control over. The oral historian should, when possible, specify a date by which it would become difficult or impossible for you to withdraw your oral history. Be

aware that even if an oral history is closed to the public for a period of time, certain legal challenges— such as subpoenas or open-record requests—may make some restrictions unenforceable.

10. Formal agreement

Either at the beginning or the conclusion of your interview, the interviewer should request a written or verbal declaration to formalize the agreed upon terms of use for the recorded interview. This process is often referred to as legal release. In recognition of the fact that you, the narrator, own the words you speak in the interview, the formal agreement is your opportunity to provide permission for others to have access to and use your interview. On this legal release, you may provide a blanket permission for the public to access and use your oral history, or you may decide to place certain restrictions on its use. Speak with your oral historian about the options. After consenting, you should receive a copy of the legal release terms.

11. Copyright

When you sign a legal release, you might also be asked to assign your copyright of the interview to the oral historian or to an archive, as part of, or in addition to, the release document. You may also be given the option of assigning your interview to the public domain or of signing a Creative Commons license. All of these options are in place so that others may quote from your interview in books, on radio, in films, or other media. Libraries and archives often wish to hold copyright so that they can protect the materials now and long into the future. Ask your interviewer to explain the document you are signing and, if you wish, other options that exist for planning public access to, and use of, your interview. Note that any time you sign a document, you should request a copy of that document to refer to later if needed. Always feel free to ask questions when in doubt.

Adapted from Oral History Association, “For Participants in Oral History Interviews,” *OHA Principles and Best Practices*, 2020.

www.oralhistory.org/for-participants-in-oral-history-interviews

Oral History at a Distance

Introduction

This section is intended to help interviewers conduct oral history interviews during the current Covid-19 pandemic. Even when face-to-face contact is considered safe again, these instructions may continue to be useful in instances where travel is not possible. All other oral history best practices and procedures should still apply with remote interviews.

We recommend using Zoom for remote interviews. This section includes instructions specifically related to that platform. We recognize that not everyone has access to a computer or high-speed internet. However, Zoom allows narrators to participate by phone, if that is their preference or only option.

Equipment

1. Computers with built-in cameras and microphones are ideal.
 - a. Note: Headphones may cause some audio issues if, for example, they run up against clothing or jewelry. Record without headphones unless there is no other option.
2. Save audio/video files in multiple temporary storage locations before sending them to their permanent repository location. Some options include:
 - a. Your personal computer
 - b. External hard drive
 - c. Online storage locations, such as Google Drive and Dropbox
3. PCM Recorder Lite is a free mobile app available for both Apple and Android devices. This can be useful for interviews not held over Zoom, or as a backup recording to the Zoom interviews.

Zoom Settings

1. Differences between free and paid accounts:
 - a. Anyone can sign up for a free Zoom account. Be aware that features are limited:
 - i. If hosting a meeting with 3 or more people, there is a 40 minute time limit. A workaround is to rejoin the meeting after time runs out. Please be aware that doing this will create multiple recording files. One-on-one meetings are unlimited.
 - ii. There aren't as many setting options. For example, if you record a meeting, the recording can only be saved directly on your device, and not in cloud storage.

- b. There are various options for paid accounts. Universities and larger organizations often have licensed accounts with more available features, including:
 - i. No time limits for larger meetings
 - ii. Cloud recording
 - iii. Audio-transcript tool
- 2. Take extra security precautions to ensure that unauthorized participants cannot enter your interview session.
 - a. Creating a password is up to your discretion, but make sure it is included in the invitation sent to your narrator. **Do not** turn on the option to “Require authentication to join” (if it is available with your account). Turning it on may cause difficulty for your participants when entering the session, and too many failed attempts may lock their accounts.
 - b. We highly recommend setting up a waiting room so that you, the meeting host, can control when participants enter the session. Any unwanted or unknown participants that try to enter the session are caught in the waiting room, so you have the option to remove them entirely.
 - c. Once all your participants are present, you can lock the meeting. This prevents others from joining, even if they have the meeting ID or password.
- 3. Some narrators may prefer to join the meeting by telephone. The following are instructions for doing so:
 - a. Zoom invitations include several phone numbers to call to join meetings from various locations. Dial the in-country phone number.
 - b. When prompted, enter the meeting ID, followed by #. The meeting ID is generally nine, ten, or eleven digits long.
 - c. If the participant dials in before the meeting has started, they will need to press # to wait.
 - d. When prompted, enter the unique participant ID. This might not apply to all, so press # to skip.
 - e. The mute/unmute function can be accessed by pressing *6. However, the narrator most likely will not need to use this function since they will be doing most of the talking.
 - f. For more information on joining Zoom calls via phone, visit [Zoom's help center](#).
- 4. Recording Interviews
 - a. Local recording vs. Cloud recording
 - i. Local recording is available for both free and paid Zoom accounts. The recordings are saved directly on your computer, but this option will not work with mobile devices or tablets. The files can be uploaded to other storage spaces, including Google Drive or Dropbox.
 - ii. Cloud recording is only available for paid accounts. You can enable this option in the Settings, under the Recording tab. When you end the meeting, the recording is saved on Zoom’s website through your account. For more information on Zoom Cloud Recordings, visit [Zoom's help center](#). Please note that Zoom automatically deletes cloud recordings

after they have been stored for 120 days. It is good practice to immediately download the recordings and save them in multiple storage locations for backup.

b. Gallery vs. Active Speaker View

- i. Gallery view displays a grid layout of participants in the video.
- ii. Active speaker view only displays the video of the person speaking. We recommend this view for recordings.

c. Audio Transcripts

Zoom can automatically transcribe the audio of a meeting recorded to the cloud. The processed transcript is saved as a .vtt text file. Though the resulting transcript will require a great deal of editing, this can help save time during the transcribing process.

d. Settings for Cloud Recordings

- i. You can access these in your Settings, under the Recording tab. The image below displays the settings we recommend. However, you should adapt them to your project needs.
- ii. Video files are the default, but Zoom also has the ability to create audio files for cloud recordings. If you are interested in saving an audio file in addition to the video recording, check off the “record an audio only file.” Please note that a video file will always be produced, regardless of whether or not you choose to check off this option.
- iii. The option to save chat messages depends on how you will use the feature. A narrator might want to use the chat to relay private information that they might not want in the recording. Provide your narrator with these options before selecting this option.

Cloud recording

Allow hosts to record and save the meeting / webinar in the cloud

☒

Record active speaker with shared screen

☐

Record gallery view with shared screen ?

☐

Record active speaker, gallery view and shared screen separately

☒

Record an audio only file

☒

Save chat messages from the meeting / webinar

Advanced cloud recording settings

☒

Add a timestamp to the recording ?

☐

Display participants' names in the recording

☒

Record thumbnails when sharing ?

☒

Optimize the recording for 3rd party video editor ?

☒

Audio transcript ?

☐

Save panelist chat to the recording ?

5. Data Security

- Interviewers and narrators may have some understandable concerns about storing recordings and transcripts in Zoom's cloud storage. According to Zoom's [privacy and security page](#), if a host enables cloud recording and audio transcripts, both are stored as encrypted files.
- You can also take extra precautions to protect your cloud-stored recordings. The image below displays the share settings for a specific recording. You can turn off the "share this recording" option. If you keep the share options on, you can choose who has access to it. Zoom automatically creates a random passcode for each recording, which you can edit.
- If you delete files from your cloud storage, they are moved to the trash. You can then permanently delete them manually. If you do not permanently delete them yourself, they will be deleted after 30 days.

Share this cloud recording

Share this recording

☒ Publicly
 ☐ Only authenticated users can view

Add expiry date to the link

☐

Viewers can download

☐

On-demand(Registration Required) ⓘ

☐

Passcode protection

☒

***** [Show](#) [Edit](#)

Recording Link Information

Display detailed information >

[Copy sharing information to clipboard](#)

Done

Pre-Interview Procedures

1. Determine what tech tools the narrator has available. It is important to be as informative and accommodating as possible throughout this process. Though some people may not have access to a computer, there are other options available in getting a high quality recording.
 - a. If your narrator has access to a computer with a camera, and you choose to use Zoom (or another similar platform), ask if they are comfortable doing a video recording. These platforms typically have an option to turn off cameras and solely record audio.
2. Once you have mutually decided on a platform, email your narrator detailed instructions on how to access the meeting and ways to prepare the room they will sit in during the interview. This may be a first-time experience for many, so be as detailed as possible.
3. Room and background preparations:
 - a. Make sure you are both sitting in a quiet space. It is ideal to sit in an area with no other people or pets, though this might not be possible for everyone.
 - b. If you are doing a video recording, make sure the narrator is well-lit.
 - c. Do not use digital backgrounds unless absolutely necessary.
 - d. Hard surfaces reflect sound, while soft and plush surfaces absorb it. Large rooms can amplify sounds and create an echo effect. If possible, record in a small room with couches, pillows, or blankets; this can help ensure a higher quality audio

recording. A bedroom is an ideal location, though it is understandable if it is too personal of a space for a recorded interview.

- e. Zoom compensates for background noise and automatically compresses the sound. Because of this, a narrator's background can seem quiet even if there is some noise. However, the audio might generate some feedback or warping when they speak. You can help prevent this by closing windows and turning off fans and other noisy appliances.
4. Set up a pre-interview, or "rehearsal" meeting to make sure all preparations and Zoom settings are in order for the interview. During this time you can walk your narrator through the platform to point out any key functions they might need, including the chat and screen sharing.
5. Work with your narrator to ensure that they are able to fill out a release form prior to the interview itself. You have a couple of options to accommodate safe distancing:
 - a. Email the narrator a copy of the release form. They may virtually sign the form and email it back to you. They may prefer to print, sign, and scan the document before emailing a copy to you; either approach is fine.
 - b. Mail the narrator a hard copy of the release form. Include a pre-stamped and addressed envelope to make the process of returning the form to you as simple as possible for the narrator. Recognize that this process will take longer than securing a virtual signature, and plan accordingly.

During the Interview

1. Close all other apps or windows on your devices that aren't necessary for the interview. Make sure cell phones, computers, email notifications, etc. are off or in silent mode.
2. Prior to recording, remind your narrator of the key Zoom functions, including the chat and screen sharing.
3. Even though you have already asked for permission to record via email, you should ask one last time to ensure transparency and a comfortable atmosphere.
4. Remember to turn on the recording! This may sound simple or obvious, but it is possible to become so preoccupied with other steps that one forgets to start the recording.
5. In your introduction, be sure to include names, date, and respective recording locations. Example: "Today is Friday, July 31, 2020. My name is Rose Harris and this is the start of a remote interview with Joan Simons; I am currently in Cambridge, Massachusetts, and Joan is in Roxbury, Massachusetts. This interview is being done in connection with my thesis about the history of student resistance in Boston, with a focus on the roles played by women. Today we'll mainly be talking about my Ms. Simon's recollection of the protests against the Vietnam War during her time at Boston University in the 1960s."
6. Mute your own microphone when the narrator is speaking. Don't forget to unmute before asking a question!
7. If you find your internet connection speed running a little slow, shutting off your video while keeping the narrator's video on might help.

Adapted from “Remote Interviewing for Zoom,” UC Berkeley Oral History Center, July 2020, and “Remote Recording with Zoom [Webinar](#),” UC Berkeley Oral History Center, July 24,2020.

See also: “Remote Interviewing Resources,” Oral History Association, 2020.
<https://www.oralhistory.org/remote-interviewing-resources/>.

Forms and Checklists

Equipment Checklist

These are some essential items to bring to your oral history interview:

- ☐ Recorder
- ☐ Microphone
- ☐ Laptop + charger
- ☐ Any applicable recording software loaded onto your laptop
- ☐ Extension cord
- ☐ 2 sets of the correct size batteries
- ☐ Camera
- ☐ Release form (2 copies)
- ☐ Pen
- ☐ Paper
- ☐ Outline of topics/questions
- ☐ Historical chronology pertaining to the time period and place(s) of your narrator's life



Northeastern University
University Libraries

Consent and Release Form

I hereby authorize Northeastern University (Northeastern), and those acting pursuant to its authority to:

- a. Record my likeness and voice on a video, audio, photographic, digital, electronic or any other medium.
- b. Use my name in connection with these recordings.
- c. Use, reproduce, exhibit or distribute in any medium (e.g. print publications, video, internet/world wide web, and/or other media formats and platforms) these recordings for any purpose that Northeastern, and those acting pursuant to its authority, deem appropriate.

I release Northeastern University and those acting pursuant to its authority from liability for any violation of any personal or proprietary right I may have in connection with such use. I understand that all such recordings, in whatever medium, shall remain the property of Northeastern. I have read and fully understand the terms of this release.

Name: _____
Address: _____
Street _____
City _____ State _____ Zip _____
Phone: _____
Signature: _____ Date: _____

Pre-Interview Template

Narrator's name: _____

Interviewer's name: _____

Date/time of pre-interview: _____

- ☐ Establish an interview location with optimal lighting
- ☐ Check tech
 - ☐ Test levels
 - ☐ Check for background noise
 - ☐ Test recording/transcript
- ☐ Verify contact information
 - ☐ Phone: _____
 - ☐ Email: _____
 - ☐ Mailing address: _____
- ☐ Review project goals and planned/potential outcomes
- ☐ Inform of stakeholders, other narrators as appropriate
- ☐ Go over narrator rights, copyright
 - ☐ Email/mail release form
- ☐ Review personal history, interview topics, questions
- ☐ Schedule interview: _____

Project details/outcomes: narrator should already have had the chance to read through the project design; this is a brief review

Project details:

Outline the main points of your project design here

Project Outcomes:

Outline the planned and potential outcomes of your project here

Biographical sketch/outline

Use this space to outline some of the major events of your narrator's life

Pre-interview questions/topics

[Feel free to draw from the sample questions, but also be sure to craft questions specific to your narrator's life experiences]

We likely won't have time to cover all during the interview, but let's review:

Information for Participants

It's a best practice to review the OHA's [Information for Participants](#) with your narrator to ensure their informed consent.

Interview Log Template

An interview log (also called a time log or index) is a great way to capture important information from a completed interview. It generally breaks the interview into small sections, often based on conversation topics, and summarizes those topics. Each summary is documented with its corresponding timestamp. You can add or remove categories in this template to ensure you capture information that is most useful to your research.

Interviewer: Mary Smith

Narrator: Cecily Johnson

Date of Interview: March 20, 2018

Location of Interview: Boston, Massachusetts

Duration of Recording: 46 minutes

Timestamp (Hour:Min:Sec)	Summary of Topic/Theme/Conversation	Key People	Key Locations
00:00:30	Cecily Johnson was born in Boston in 1955, and grew up in Roxbury.		
00:00:50	Her earliest memory involves playing in the snow with her three older brothers. She was about three years old.		
00:01:26	She describes conditions in the Boston Public School.		
00:03:40	She took part in METCO's first busing program in 1966, and attended a junior high school in Newton.		High school in Newton, MA
00:05:26	Briefly met Ruth Batson and talked about...	Ruth Batson	

Interview Metadata Form

Interviewers: Please complete this form as soon as possible after recording, while the interview is fresh in your mind. Keep this metadata form with other interview materials, and submit the completed packet to Northeastern University Archives and Special Collections.

Project: _____ **Interview Date:** _____

Interviewee Information

Last Name: _____ First Name: _____

Middle Name: _____ Former Name(s): _____

Address: _____

Phone: _____ Email: _____

Birth Date (optional): Month: _____ Day: _____ Year: _____

Interviewer Information

Last Name: _____ First Name: _____

Middle Name: _____ Former Name(s): _____

Address: _____

Phone: _____ Email: _____

Birth Date (optional): Month: _____ Day: _____ Year: _____

Form continues →

Technical Information

Check all that apply and leave blank anything you do not know.

Length of interview (hh:mm:ss): _____ Format of interview: Audio _____ Video _____

Audio format: .wav _____ .mp3 _____ .aiff _____ other _____

Video format: .avi _____ .mov _____ .mp4 _____ .m4v _____ Other _____

Does this interview span multiple files/media types? Yes _____ No _____

If yes, how many? _____

Transfer medium: Flash card _____ Flash/thumb drive _____ Hard drive _____

Other _____

File names: _____

Form continues →

Descriptive Information

Synopsis: Please write 3-5 sentences to describe topical content and themes expressed in the interview. **Tip:** Try to envision what a future researcher would want to read in a summary about this interview to give them an idea of what information is contained in the content of this interview. Continue on an extra attachment if necessary.

Keywords: Please list 5 to 10 subjects discussed in the interview. As above, try to anticipate what keywords would connect future researchers to the information in this interview. Feel free to be both broad and specific (i.e. “Childhood” or “Boston, Massachusetts”).

Proper Names: Please list any proper names (people, places, organizations, etc.) mentioned in the course of the interview.

Glossary

These definitions have been adapted from the Oral History Association's [Principles and Best Practices Glossary](#), the [Dictionary of Archives Terminology](#), and resources from Baylor University's Institute of Oral History.

Access - This can refer to the formats in which the recorded interviews are available (i.e. physical, virtual, transcript). It can also refer to the permissions to use the interviews, whether in part or full publication.

Administrative restriction - A restriction decision made by the project director after reviewing the interview. This may occur in cases where the interviewer or project director believes certain content should not be revealed or publicly published during current times. An administrative restriction seals the interview for a certain period (i.e. 3-5 years). After the restricted time period has passed, the interview can be reviewed again to determine whether or not it can be made publicly available.

Anonymous - In oral history, the "anonymous" title is given when the narrator's identity cannot be determined through identifiable information. This is not in reference to a narrator's decision to retract their name or use a pseudonym.

Archives - There are three possible references for an "archive": an organization that collects and maintains historical documents and records, the records themselves, or the physical space where the records are stored. Oral history recordings are generally stored and maintained in an archive or other repositories.

Confidential - If the narrator does not want certain information to be disclosed, they have the right and should feel empowered to ask about restriction options. It is the oral historian's responsibility to protect confidential information and ensure that it cannot be publicly accessed by unauthorized parties. In some cases, these restrictions can last for a certain period of time; the narrator and oral historian can decide on this together.

Copyright - The rights to use, distribute, and profit from an original work or form of intellectual property. In most cases, oral history interviews are considered the narrator's intellectual property, which makes them the legal owner or co-owner of the copyright. Copyright ownership begins once the recording starts.

Creative Commons license - A license that is used to define how the narrator, the main copyright holder, would like the general public to make use of their oral history interview and its related materials.

Deed of gift - A legal release form that gives the institution managing the collection permission to have and use the interview. Components include a brief description of the project, a donor agreement, a transfer of copyright, and a statement about future use of the interview, such as details on any restrictions the narrator may request regarding public access and use. As it is a donation, there is no monetary compensation.

Formal agreement - Oral history interviews often involve signed formal agreements or release forms that specify how the interview may be accessed or used. Examples include deeds of gift and Creative Commons licenses.

Identifiable information - Information provided during an oral history interview that could be used to identify the narrator, including name or date of birth. The OHA offers this disclaimer: "Narrators [should] bear in mind that oral history interviews often gather comprehensive narratives about the narrator's experiences and life story that could be recognized by others."

Informed consent - To ensure transparency throughout the interview process, the interviewer must provide the narrator with as much information as possible. This agreement, documented in writing or verbally, should include information regarding interview logistics (approximate length, type of recording, potential topics or questions) and use after the interview is complete (storage location, whether it will be transcribed, potential use in a public setting). This information is necessary as it can affect the narrator's decision to participate in the oral history project. Copyright information is not included.

Institutional Review Boards (IRBs): An administrative ethics committee that oversees the rights and welfare of those participating in human subject research (in this case, the narrator being interviewed). As of 2019, oral history research is no longer required to be reviewed by the IRB because it "preserves the unique perspective of an individual and [does] not lead to systematic generalizable knowledge." Please see the following links for more information: <https://www.oralhistory.org/information-about-irbs/> and <https://www.oralhistory.org/2018/07/06/institutional-review-boards-and-oral-history-an-update/>

Interviewer - The person conducting the oral history interview.

Interview log (also called time log or index) - A log of an interview's contents that often looks similar to a table of contents. The complete interview is broken into small sections and summarized. Each summary is documented with its corresponding timestamp. This is different from a word-for-word transcript, but is still a good resource for researchers and other users.

Living human subjects - The living individuals who are asked to participate in research projects by providing personal information or recollections that help researchers or scholars understand a broader topic. This term is often used by the Institutional Review Board (IRB). In oral history, the narrator would be considered the living human subject.

Narrator - The person being interviewed. While some might use the term “interviewee,” the OHA prefers the term “narrator,” as it gives those who are interviewed more agency.

Oral history - A historical research method that collects and preserves a person’s life history, memories, or firsthand accounts of an event. They are conducted through audio or video recordings.

Permission to use - An agreement that defines how certain parties can make use of an oral history.

Privacy - This refers to the protection of a narrator’s private information from unauthorized parties. Interviewers must provide narrators with a clear understanding of what access to their interviews, as well as any corresponding materials, will look like. Data privacy standards have changed over the years, but interviewers and anyone storing the interviews should take the necessary steps to ensure all materials and files are protected from possible unauthorized uses.

Private information - Sometimes a narrator may share information they do not want to be recorded or made available to others. The narrator should always feel comfortable and empowered to ask the interviewer to pause the recording or redact private information that has already been shared. This is important as it allows the narrator to have autonomy over their story.

Pseudonym - A fictitious name that can be used if the narrator does not want to use their real name. In such a case, the oral historian should use the fictitious name in all instances, including the interview, transcripts, finding aids, time logs, and publications.

Public domain - Creative materials that are not protected by intellectual property laws, including copyright and trademark. They can be used by anyone without permission.

Repository - A physical or digital location that permanently stores valuable files or records, including oral history recordings and transcripts. Examples include libraries or archives.

Restrictions - The limitations placed on the use or access of an interview. This might include a restriction on public access for a certain period of time, or online vs. physical access to the interview. For example, some narrators may feel comfortable participating in the project, but may not want their interview published on a website. All restrictions should be detailed in the deed of gift. It is also important to refer to the policies of the institution or archive that will store the interview.

Terms - This refers to the terms of agreement regarding the use of oral history interviews. This can include restrictions on public access for a certain period of time.

Transcript - The text of an oral history interview, typed out word-for-word. Though it is time-consuming (it can take approximately 10 hours to transcribe an hour long interview) and expensive to transcribe, the final product makes it easier to access information within the interview. Changes to interview content should not be made when transcribing. For instance, the narrator's grammar or use of slang should be documented accurately.

Transfer of copyright - This statement transfers all property rights to the institution or organization holding the interview, and is generally included in the deed of gift. By signing this statement, the narrator gives the institution the right to reproduce, prepare a derivative work (such as a transcript), and publicly display the interview in other forms (such as an exhibit or documentary).

Learn More

Books

1. [*Doing Oral History: A Practical Guide*](#) by Donald Ritchie (2003)
An introductory book that provides step-by-step instructions on how to conduct oral history interviews and develop various products from the interviews.
2. [*Oral History and Digital Humanities: Voice, Access, and Engagement*](#) by Douglas A. Boyd and Mary A. Larson (2014)
This book examines the theoretical and practical developments in oral history over the last two decades.
3. [*Catching Stories: A Practical Guide to Oral History*](#) by Donna Marie Deblasio (2009)
This book is a clear introductory guide to planning an oral history project.
4. [*Preparing the Next Generation of Oral Historians: An Anthology of Oral History Education*](#) by Barry Allen Lanman and Laura Marie Wendling (2006)
A resource for educators who would like to incorporate oral history into their curriculum.
5. [*The Voice of the Past: Oral History*](#) by Paul Richard Thompson (revised 2000)
This book addresses some of the achievements in the oral history movement, looks at memory, and offers advice in designing a project.
6. [*Community Oral History Toolkit*](#) by Nancy MacKay, Mary Kay Quinlan, Barbara W Sommer (2016)
This book guides you through the process of creating community-driven oral history projects.
7. [*The Oral History Reader*](#) edited by Robert Perks and Alistair Thomson (3rd edition, 2016)
A collection of essays that covers a range of themes in oral history theory and practice.
8. [*A Guide to Oral History and the Law*](#) by John A. Neuenschwander (2nd edition, 2014)
This book explains legal issues related to oral history, including copyright, privacy, and legal release agreements, among other topics.
9. [*Say It Forward: A Guide to Social Justice Storytelling*](#) by Cliff Mayotte and Claire Kieffer, eds. (2018)
This guide offers strategies for creating justice-driven oral history projects.

Scholarly Articles

1. McLellan, Marjorie L. "Case Studies in Oral History and Community Learning." *The Oral History Review* 25, no. 1-2 (1998): 81-112. www.jstor.org/stable/3675580.
Includes case studies of undergraduate programs that integrate oral history "with opportunities for community learning and service."
2. Swain, Ellen D. "Oral History in the Archives: Its Documentary Role in the Twenty-First Century." *The American Archivist* 66, no. 1 (2003): 139-158.
<http://www.jstor.org.ezproxy.bpl.org/stable/40294221>.
This article "examines how the introduction of oral history in archives and libraries has challenged and informed archival theory and practice in the United States."
3. McDonnell, Janet A. "Documenting Cultural and Historical Memory: Oral History in the National Park Service." *The Oral History Review* 30, no. 2 (2003): 99-109.
<http://www.jstor.org.ezproxy.bpl.org/stable/3675479>.
This article covers oral history projects and programs within the National Park Service.
4. Chancellor, Renate and Shari Lee. "Storytelling, Oral History, and Building the Library Community." *Storytelling, Self, Society* 12, no. 1 (2016): 39-54.
<http://www.jstor.org.ezproxy.bpl.org/stable/10.13110/storselfsoci.12.1.0039>.
The authors examine how oral history can be used as a tool for preparing local history programs in libraries, and include a general set of guidelines.
5. Kaufman, Peter B. "Oral History in the Video Age." *The Oral History Review* 40, no. 1 (2013): 1-7. <http://www.jstor.org.ezproxy.bpl.org/stable/43863451>.
This article "examines the role of oral history in a cultural and technical context increasingly dominated by digital video," and explores topics regarding access and audience engagement.

Online Resources

1. [H-OralHist](#), H-Net, Humanities & Social Sciences On-Line
This listserv for oral history practitioners is an excellent way to stay informed of upcoming workshops, webinars, and projects, and to connect with a broad network of people working in oral history.
2. [Oral History in the Digital Age: Best Practices](#) by the Institute of Museum and Library Sciences
This resource contains essays, case studies, and tutorials on a wide range of topics.
3. [Documenting and Interpreting Conflict through Oral History: A Working Guide](#) from Columbia University's Center for Oral History

A guide to help those who are interested in collecting oral histories in conflict and post-conflict situations.

4. [Remote Interviewing Resources](#) from the Oral History Association
This guide addresses the numerous questions oral historians might have regarding remote interviewing, including hardware and archival considerations.
5. [Doing Oral History Webinar Recordings](#) from the Association for Library Collections & Technical Services (a division of the American Library Association)
This webinar was originally presented live in April 2016; they have since made the recordings and presentation slides available to the public for free.
6. [Record and Remember Teaching Resources](#) created in conjunction with the Preserve the Baltimore Uprising Archive Project
A set of curriculum resources based on the 2015 Baltimore Uprising for those interested in teaching oral history, including teacher guides, powerpoint slides, and worksheets.
7. [Documenting Narratives of Violence: Trauma-Informed Interviewing for General Audiences](#) by Jane Field, Texas After Violence Project
This online training teaches trauma-informed life history interviewing skills.
8. [“What is Language Justice and Why Does it Matter in Oral History Work?”](#) by Alison Corbett and Fanny Garcia, Groundswell: Oral History for Social Change
Oral historians Allison Corbett and Fanny Garcia examine different forms of language justice and why they matter in oral history work with communities that use various languages.
9. [“First, Do No Harm: Tread Carefully Where Oral History, Trauma, and Current Crises Intersect”](#) by Jennifer Cramer, Association of Southern Research Libraries
In this webinar, oral historian Jennifer Cramer considers strategies to undertake current-event crisis oral histories, advocating for project designs that include trauma mitigation efforts.
10. [“Oral History and Power,”](#) Columbia Oral History Master of Arts, Fall 2020 - Spring 2021 Workshop Series
This public workshop series, led by oral historians in the Columbia Oral History Master of Arts Program, examines the relationships of oral history and power.
11. [No one owes their trauma to archivists, or, the commodification of contemporaneous collecting](#) by Eira Tansey
In this blog post, archivist Eira Tansey critically examines contemporaneous collecting projects and the ethical obligations of archivists documenting traumatic events.