

# **ORAL HISTORY FOR THE PEOPLE!**

**Tips and Techniques for  
Conducting Oral History**



**Travis County Historical Commission  
2022**

# An Introduction to Oral History

## WHAT IS ORAL HISTORY?

Oral history is a way of gathering, interpreting, and preserving information about the past through recorded interviews that explore a narrator's experiences, opinions, and life history.

## WHAT IS A NARRATOR?

The person being interviewed is sometimes called a "narrator" because they walk us through, or "narrate," their life. A narrator could be anyone - a friend, relative, someone you know from church or work, or someone who may have special knowledge about your family or community. The idea is that their experiences are valuable and deserve to be preserved and shared.

## WHERE DOES THIS RESEARCH METHOD COME FROM?

Oral history comes from a long tradition of passing down stories from generation to generation through word of mouth. Oral historians build on this tradition by recording those stories and making them available to future generations. What does this look like? Instead of just having a casual conversation with your grandma about her childhood, you would plan an interview, record it, and preserve it.





# An Introduction to Oral History

## WHAT IS THE PURPOSE OF ORAL HISTORY?

- **Oral history helps us learn about our families, our communities, and ourselves:** Oral history creates conversations and introduces us to stories and connections we might have never found otherwise.
- **Oral history allows us to tell our own story:** Oral history captures a version of the past that you aren't likely to find in history textbooks.
- **Oral history preserves our voices:** Not only does oral history allow us to make our voice heard, it allows us to make sure our voice is heard for generations to come.

## WHO IS THIS MANUAL MADE FOR?

You do not need to be a trained historian to conduct oral histories. This research method is used by all kinds of people ranging from students to journalists to family historians. With this in mind, this manual was created for anyone interested in learning more about their family or community.





# Guidelines for all Projects

This section of the manual is a guide for projects of all shapes and sizes. Whether you are interviewing your grandma or your graduating class, these guidelines were made for you. However, if you are planning to make your project accessible to the community (ex. in library, archive, or other repository), don't miss the additional information included in the next section, "Guidelines for Public Use," starting on page 16.



## Planning a Project

This section of the manual is a guide for projects of all shapes and sizes. Whether you are interviewing your grandma or your graduating class, these guidelines were made for you. However, if you are planning to make your project accessible to the community (ex. in library, archive, or other repository), don't miss the additional information included in the next section, "Guidelines for Public Use," starting on page 16.

### WHY DO I NEED TO DO AN ORAL HISTORY?

- Determine what information you are seeking.
- Make sure that an oral history project is the best way to get this information. If you believe some person or group has firsthand knowledge about something that hasn't been written down, you are on the right track.

### WHAT ARE MY GOALS AND PRIORITIES?

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### WHO IS MY AUDIENCE?

- Who are you creating this for? Yourself? Your family? Your community? Current and future researchers? If the answer is anyone more than yourself or your family, check out the second section of this manual, "Guidelines for Public Use," on page 16.

## WHICH EQUIPMENT WILL I USE?

- Figure out which equipment you will use based on your project goals and budget.
- Decide whether you will collect video recordings in addition to audio recordings.

## HOW LONG WILL THIS TAKE?

- It depends. The more interviews you conduct, the longer your project will take. The more help you have, the more quickly the work can get done. Regardless, be aware that oral history takes time!
- Be realistic with how many interviews you plan to conduct.
- Set deadlines for yourself to move the project along.

## HOW MUCH WILL THIS ALL COST?

- Once again, it depends. Are you starting from scratch? Do you need to buy a recording device?
- Oral history doesn't have to be expensive. You don't need to break your budget to get equipment that will get the job done.
- Research any funds, grants, or donations that might help offset the cost of your project.
- Develop a budget for equipment, travel, and any other expenses you might have.

# 2 Choosing Equipment

## EQUIPMENT FOR RECORDING

As a general rule, you should look for the most sturdy, dependable recorder that is within your budget. Depending on what you are comfortable with, you might choose a digital or analog recorder, or even your smartphone. If you are unsure which is the best fit for you, consider the pros and cons listed on the next page.



	Digital	Analog	Smart Phone
<b>Equipment</b>	Not bulky. Easy to transport.	Bulkier and more difficult to store and transport.	Not bulky. If you already have one, it's likely always on you.
<b>Cost</b>	Prices vary. Can be less expensive because it relies more on software than physical equipment.	Prices vary. If you want to transcribe, you will also need to purchase or borrow a transcription machine as well.	If you already have a smartphone, no cost. You might choose to purchase add-ons such as a microphone or phone stand.
<b>Sound</b>	Cleaner sound. Less background noise.	More natural sound.	Lower quality sound. Can be improved with external microphone.
<b>Transcribing</b>	Transcription software is available to make the transcription process easier.	Requires a transcription machine and pedal.	Transcription software is available to make the transcription process easier.
<b>Access</b>	Audio files are more accessible - they can be stored and listened to on multiple devices and shared via the internet.	Audio files are less accessible - the listener needs access to the tape and a tape player.	Audio files are more accessible - they can be stored and listened to on multiple devices and shared via the internet.



## EQUIPMENT FOR RECORDING

If you decide to use a recorder, there are many devices to choose between. Feel free to do your own exploring, but here are two good options:



**Zoom H1 Digital Recorder:** Recorder recommended by oral historians and available on Amazon. This is a great option, but there are also plenty of less expensive recorders that will do the job.

**Tyler TCP-01 Analog Recorder:** Durable, affordable, and easy-to-use with a built-in microphone.



If you use a smartphone, check out the guide at <https://oralhistorycentre.ca/mobile/>. It includes pointers about smartphone recording set-up, settings, power, storage, and file transfer. In addition, you can find a list of suggestions for recording applications, external microphones, and other add-ons.

If you are creating your project for public use, a smartphone might not be your best option because repositories usually want higher quality audio formats. Check with your repository before choosing equipment. More on this in the “Guidelines for Public Use” section on page 16.

## EQUIPMENT FOR PRESERVING DIGITAL AUDIO FILES

The goal of oral history is to preserve and share people's stories. So, it is important to be intentional about how your interviews are stored and secured. Let's start with the basics:

1. Audio files should be stored in several separate places.
2. Audio files should be stored in several media formats.

Now, let's get to the nitty gritty.

- First, transfer the audio files from your recorder to your computer as soon as possible after the interview. Make sure this hard drive is backed up regularly and has enough space.
- Consider the following as options for additional places to store these files:



**Remote hard drives:** You might save your files to an additional computer hard drive that is located in a different place (different room, building, city, etc.) than the computer to which you originally transferred the files.

**External hard drives:** Solid-state drives (SSD) are a great choice for long-term digital storage. They are faster and sturdier than traditional hard-disk drives (HDD).



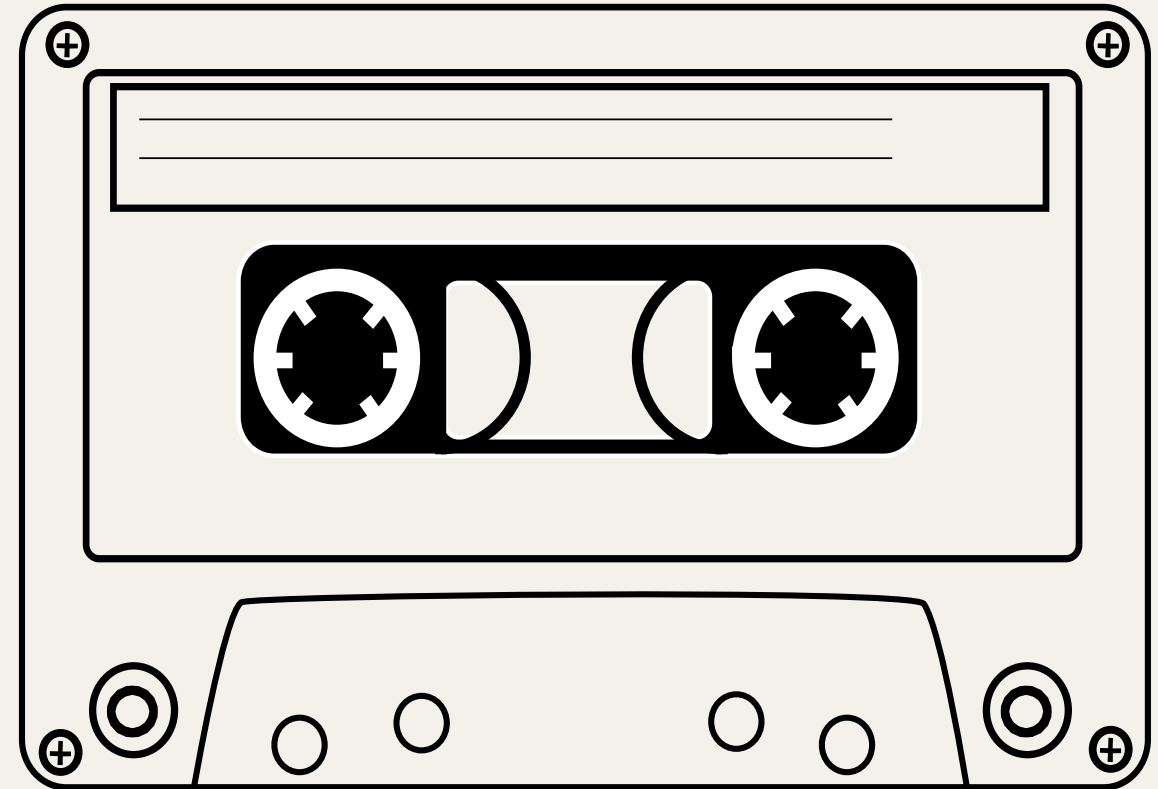
**Cloud services:** This refers to services that store files in the online "cloud" rather than a physical hard drive. Google Drive is a popular example that is free up to a certain amount of storage space.



## EQUIPMENT FOR PRESERVING PHYSICAL AUDIO FILES

If you choose to use an analog recorder, you will be working with tapes. Take the following steps to ensure they are well-preserved:

- Make a copy in case anything happens to the original tape.
- Store your tapes in a safe environment - avoid direct sunlight, extreme temperatures, high humidity, and contact with water.
- Label your tape with information from the interview (ex. name, date, and project).



## AUDIO VS. VIDEO

Some oral historians use video to record their interviews. If your narrator has something to show or demonstrate that can't be captured with audio (ex. painting, dance, quilting, etc.), you might consider this option. However, there are also some possible drawbacks you should consider first. Would your narrator feel comfortable being recorded? Will they be less likely to open up and share if a camera is trained on them? If you're not sure, ask your narrator how they feel. Sticking with audio is fine if they will feel more comfortable that way! You might also take a photo of the narrator in the interview setting - an option they may feel more at ease with.

## FINAL WORDS OF ADVICE ON EQUIPMENT

1. **Buy the best equipment for you:** There are tons of options out there for equipment. Choose whatever works best for you, your budget, and your project.
2. **Be kind to your wallet:** Check with community organizations, colleges, libraries, and schools to see if they have oral history equipment available for loan.
3. **Get to know your equipment:** Before interviews, practice with your equipment to get the hang of it and ensure everything is in working order.

# 3

## Background Research

### PURPOSE OF BACKGROUND RESEARCH

In order to plan a good interview, you first need to find out what is *already* known about your topic. This way, you can plan an interview that uncovers *new information*. Background research also helps oral historians:

- Understand the historical background of their topic
- Learn more about the narrator
- Determine themes to focus on during the interview
- Keep the story on track during the interview

### FOCUSING YOUR TOPIC

It might be helpful to decide the focus of your interview before diving into background research and interviews. For instance, your interview might fit into one of the following focuses:

Topical Focus	Biographical Focus	Oral Tradition
Zooms in on a specific topic such as an event, era, issue, or place. You might reach out to a few different people for their perspectives.	Looks at the life experiences of an individual from their point of view as well as others who know or knew them.	Asks about legends, folklore, and family stories passed down from generation to generation. You might talk to different members of the family or community who share a tradition.

## PURPOSE OF BACKGROUND RESEARCH

Once you have defined and focused your topic, it is time to start learning about it. Potential places to find information include:

- Libraries and archives (online and in-person)
  - Look at both primary sources (photographs, letters, newspapers, etc.) and secondary sources (articles, books, etc.)
  - Make sure to check out Austin History Center. Their archivists and finding aids will help you research just about any topic related to Central Texas history.
- Local historical groups
- Public records (censuses, deeds, military records, etc.)
- Organizations that your narrator is a part of (schools, churches, etc.)
- Pre-interview visit with your narrator to ask if they know of any places, people, and/or resources you might check out

# 4 Finding & Contacting Narrators

## LOCATING NARRATORS

Depending on the nature of your project, you might already have several narrators in mind. If not, do not fret! There are a number of ways to locate narrators who have had first-hand experience related to your project. You might find narrators through:

- Background research
- Word-of-mouth
- Notices in local news media
- Public events related to your topic
- Social media announcements
- Organizations related to your topic
- “Snowball effect:” One narrator recommends another





## CONTACTING NARRATORS

How you contact your narrator will depend on your relationship to them. If your narrator is a family member or close friend, you might just reach out directly to tell them about your project and ask for their participation. If your narrator is someone you are less familiar with, you might reach out by email and make a follow up call. Here are some suggestions for writing the email:

- Briefly describe your project and why you are interested in speaking with them.
- Invite the potential narrator to participate in an oral history interview because you feel their experiences and point of view are important.
- Ask them if it's okay to follow up with a phone call to answer any questions and discuss the interview process.

## 5 Setting Up Interviews

Once someone has agreed to participate in your oral history, the next step is to set up a date, place, and time for their interview. If you do not know the narrator very well, it might make them feel more comfortable if the person who referred them to you is part of this process. Finally, keep in mind that you may need time to prepare for the interview depending on how well you know the narrator and your topic.

When setting up the interview, think about how you can make it as easy and comfortable for the narrator as possible. For instance, do they have a car? What kind of space would they feel most comfortable in? What time of day not only works with their schedule, but do they prefer? In addition, make sure that the location you choose is as quiet and private as possible. It is a good idea to have an alternate location in mind in case something unexpected happens.



The narrator for the King-Woods Farmstead project felt most comfortable in her home.

Finally, keep in mind that it is best to interview one person at a time. This way, you won't end up with a recording full of voices talking over one another.

# 6

## Preparing for the Interview

### CREATING AN INTERVIEW OUTLINE

Instead of writing a list of questions, create a list of keywords, topics, and phrases that will act as a road map for the information you want to explore during the interview. This way, the interview will be more like a conversation.



For the outline, draw on your background research and what you already know about the narrator. You might also share the outline with your narrator before the interview in order to stimulate their memories and help them feel prepared and comfortable.

### PRACTICING WITH EQUIPMENT

In the weeks leading up to the interview, get familiar with your equipment. The best way to do this? A practice run. Make a short recording and check the audio quality so you can make adjustments if needed. The less attention you have to give to your equipment, the more attention you can give to the narrator during their interview.

# 7

## Conducting the Interview

### SETTING UP THE INTERVIEW

- Arrive on time and allow time for small talk and questions before the interview.
- Bring an extension cord or extra batteries depending on your equipment.
- Arrange the interview space.
  - Find a spot that is as quiet as possible. Is there anything nearby that might interfere with the audio quality (ex. loud air conditioner, TV, chiming clock)? If so, ask permission to make changes that would reduce this background noise.
  - Set up the microphone and recorder between you and the narrator. Make sure the recorder is positioned so that you are able to see the recording levels.
  - Make sure the space is comfortable for your narrator.
- Make a short test recording. Listen and make adjustments as necessary.



## OPENING THE INTERVIEW

If using an analog recorder, wait a few seconds after starting the recorder to speak so nothing gets cut off. Begin with a recorded introduction that describes the who, where, and what of the interview. You might use the following example:

“This is (your full name). Today is (month/day/year). I am interviewing (full name of narrator and spelling) for the (name of project). This is our (first, second, etc.) interview. It is taking place at (description of location).”



## ASKING QUESTIONS

First, some general words of advice to guide your questioning:

- Take notes: As you listen to your narrator, jot down important people, events, and dates.
- Be patient: Allow your narrator time to think and reflect. Silence is okay!
- Be clear and concise: Ask one question at a time.
- Be flexible: It is likely that the interview will get off topic. Don't panic, just gently guide the interview back on course. Also, consider that some diversions might provide meaningful information that you just hadn't thought to ask about.
- Be appreciative: Express your gratitude at the end of the interview.

Now, let's talk about the questions themselves. Good questions begin with the basics, encourage elaboration, and ensure the interviewer's understanding. In addition, they are open-ended and not leading or loaded. Check out what this means (plus some examples) on the next page.



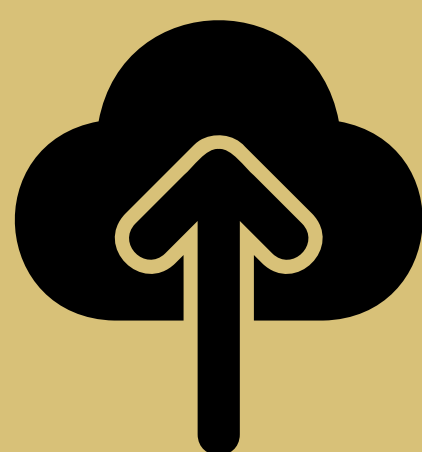
<b>Begins with the basics</b>	Start with questions that your narrator will be at ease answering.	Where were you born? If you don't mind, when were you born? What were your parents' names? And your grandparents?
<b>Open-ended</b>	Ask questions that require more than a simple "yes" or "no" response.	Tell me about... Why/why not? How...? What are the differences/similarities...? Describe... Explain...
<b>Encourages elaboration</b>	Ask follow up questions that probe for details and stimulate their memory.	Tell me more about... What/who else...? What other reasons...? Why do you think?
<b>Not leading or loaded</b>	Avoid questions that make assumptions about the narrator or lead them to a specific response.	No: As a native Austinite, I imagine you are upset by how rapidly the neighborhood is changing, right?
<b>Ensures your understanding</b>	Make sure you are on same page with your narrator. Restate or summarize their responses, ask for definitions and clarifications, etc.	You said... Let me make sure I understand... Tell me what...means. I know what...means but future generations might not...

# 8

## Post-Interview Tasks

### POST-INTERVIEW CHECKLIST

**Interview information:** Write down the time, place, name of the narrator, and perhaps a brief description of the information covered in the interview. You also might take a photo of the narrator in the interview setting (with permission).



**Protect and preserve recordings:** Download your recordings as soon as possible and create backups. Use consistent and easily recognizable file and folder names.

**Thank you letter:** Write the narrator a letter or email expressing your gratitude - handwritten is best - for their participation and reminding them of the importance of their account to the project..



**Process the interview:** If you are interested in transcribing the interview, find detailed information about this process in the “Projects for Public Use” section on page 16.

# Guidelines for Public Use

This section of the manual includes additional information and topics related to projects intended for public use. If you are hoping to make your project accessible to the community in a library, archive, or other repository, you are in the right place.

## 1 Pre-Interview Steps

### FOLLOWING ACCEPTED PRACTICES

- If you have a larger audience, you should obtain permission from the narrators to share their interviews with others. There are simple **release forms** that will guide this process - more on this soon.
- If you are creating a project that you hope will be used by researchers, reach out to **local repositories** (libraries, museums, etc.) and ask which guidelines they follow.
- Get to know the general **principles and best practices** of the Oral History Association. How will you implement these in your own project?

### CHOOSING A REPOSITORY

If you want to make your project accessible in a repository, consider different options - libraries, archives, museums, and other historical organizations.

As you weigh your options, you might ask some of the following questions:

- How does this repository maintain oral histories and make them accessible to researchers as well as the public? Does this match my project goals?
- Will this repository take all of my project materials?
- Do they have a release form already prepared that will allow others to access these materials? Or will I need to create one?
- What other requirements or guidelines do they have for the use of these materials?



Once you make a decision, contact your chosen repository as soon as possible.



## CREATING A RELEASE FORM

If you intend to make your project accessible to the public - maybe in a library or other repository - keep in mind that interviews are subject to copyright law. Basically, this means that you need to get your narrator to agree to doing the interview and sharing it because they own their words. To do this, you will create a **release form** for narrators to sign that addresses the following:

**Donor Agreement:** Narrator agrees to donate their interview to the interviewer, the interviewer's sponsoring organization, or the specified depository. This step ensures that the public can access the interview.

**Copyright Assignment:** Narrator agrees to transfer copyright ownership to the individual or organization sponsoring the project. This does NOT mean that the narrator loses the rights to their interview or transcripts. Again, it is important for public access.



**Future Use:** Narrators have a right to know how their words will be used in the future. So, the release form needs to address how the interview will be published and distributed. Narrators also may restrict the future use of their interview (ex. to a certain time period or audience). If this is the case, add that information to the release form. Include a date for when the restriction period ends.

*This may sound intimidating but the good news is that it is a requirement for many oral history projects so there are a ton of examples out there!*

## ESTABLISHING ETHICAL RELATIONSHIPS

A meaningful oral history interview is built on mutual respect and trust. There is no formula for developing this kind of relationship, however, paying close attention to the following matters is a good place to start:



<b>Transparency</b>	<ul style="list-style-type: none"><li>• Make sure narrators know their rights and interests.</li><li>• Explain the project purpose, goals, and process to the narrator.</li><li>• Discuss how your narrator’s interview might be used in the future.</li></ul>
<b>Relationship</b>	<ul style="list-style-type: none"><li>• Get to know the narrator prior to the interview.</li><li>• Tell them a bit about yourself.</li></ul>
<b>Long-Range Outlook</b>	<ul style="list-style-type: none"><li>• Make the highest quality interviews possible and preserve them in a space where they are accessible to both the community and researchers.</li><li>• Consider how your project will benefit your narrators and their communities.</li></ul>
<b>Sociocultural Awareness</b>	<ul style="list-style-type: none"><li>• Be aware and considerate of differences between you and your narrator (age, gender, race, class, etc.).</li><li>• Respect the privacy of your narrators and their communities.</li></ul>
<b>Correct Representation of Meaning</b>	<ul style="list-style-type: none"><li>• Ask open-ended questions that encourage your narrator to tell their story as freely as possible.</li><li>• Give narrators the chance to review transcripts and offer corrections.</li></ul>

# 2

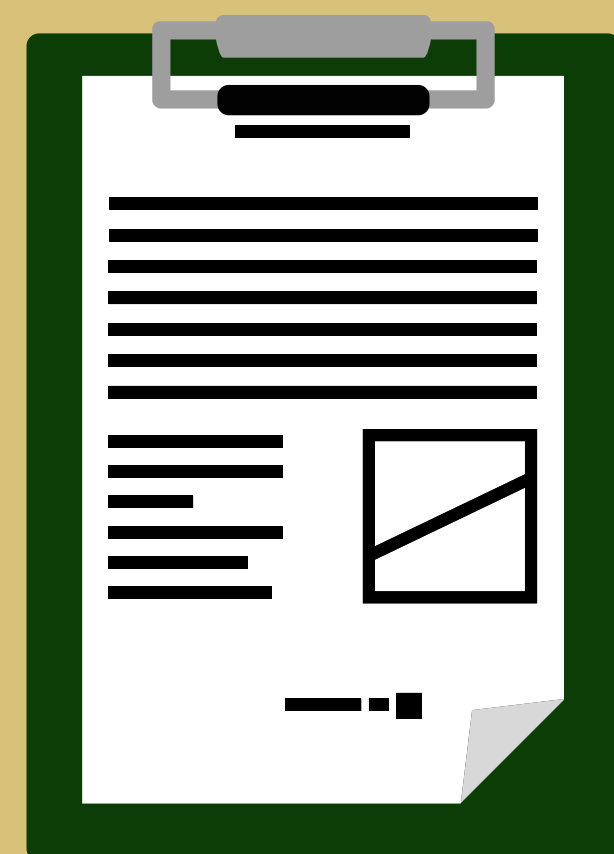
## Post-Interview Steps

### PROCESSING

Processing refers to the tasks associated with preparing your project for public use and/or deposit in a repository. These tasks include creating a synopsis, timecoding, and transcribing. Which tasks you choose to undertake depend on your project vision, your schedule and budget, and the requirements of the repository you have chosen.

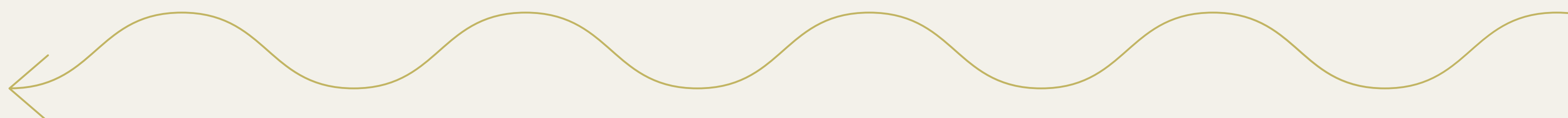
#### #1: WRITING A SYNOPSIS

A synopsis is a short summary of the interview that describes the main topics, people, places, and events discussed. It should also include the name of the narrator and interview as well as the date/place of the interview. While a repository may or may not require a synopsis, it will make your project more accessible to the public.



#### #2: TRANSCRIBING

A transcript is the word-for-word written record of an oral history. While transcribing is a time-consuming process if you choose to do it yourself (it takes about 4-8 hours to transcribe one recorded hour) and expensive if you choose to hire a transcription service, it can be a worthwhile endeavor depending on your project goals





## WHY TRANSCRIBE?

- **Ensuring Quality:** Writing a transcript opens the opportunity for narrators to provide corrections and clarify information that might have been misunderstood. In the process, a more accurate account is created.
- **Access:** Transcripts make your interview more accessible to researchers as well as the public. Rather than listen to an entire interview, they can search through a written transcript for specific information they need.
- **Getting Your Work Out There:** In written form, the information in your interview becomes more easily adaptable for use in media presentations, exhibits, and research publications.
- **Shelf Life:** Recording and playback technology changes constantly, creating potential issues of access for researchers in the future. On the other hand, a written record has a much longer shelf life and will guarantee that your project remains accessible for years to come.

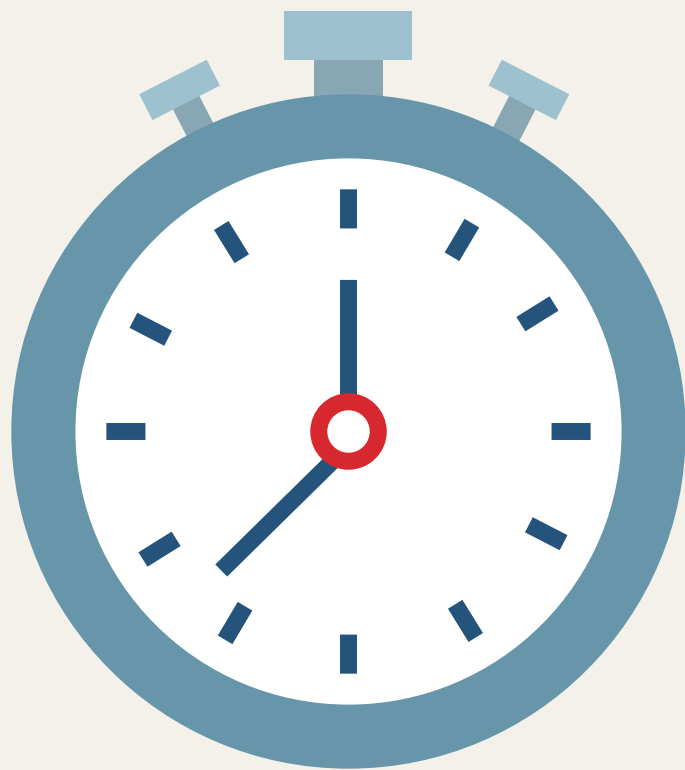
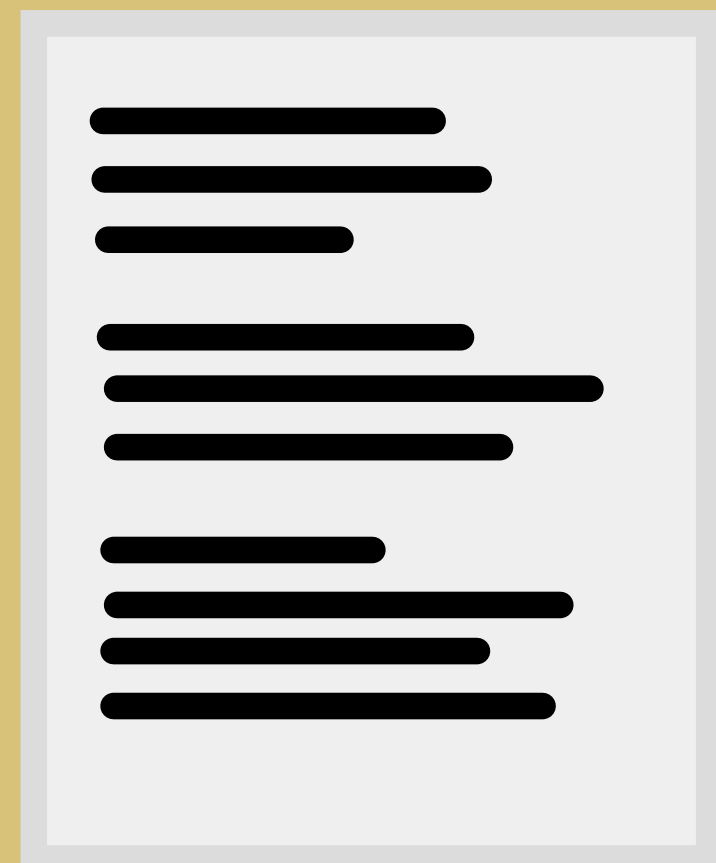
## SO, HOW DO I TRANSCRIBE?

1. **Download transcribing software:** *Express Scribe* is a good option.
2. **Purchase or rent equipment:** Foot pedals with a USB connection will help control playback. Find a good pair of headphones if you do not already have some.
3. **Choose a standard format:** *Chicago Manual of Style* is recommended.
4. **Review style guidelines:** Use a guide such as Baylor University Institute for Oral History's *Oral History Transcribing Style Guide*.
5. **Create transcript:** As you transcribe, remember to change as little as possible. Maintain your narrator's exact word choice, speech patterns, and grammar.
6. **Send transcript draft to narrator:** After creating a transcript draft, send it to your narrator for corrections. This is not a chance for the narrator to revise what they said during the interview, but rather, to point out mistakes such as the spelling of places and names.
7. **Revise the transcript:** Make changes according to the narrator's corrections.
8. **Save and distribute the final copy:** Save the transcript on a secure hard drive and create backups. Present your narrator with a final, corrected draft.



### #3: TIME-SUBJECT INDEX

If you don't choose to transcribe, there are other ways to process your interview. For instance, you can create a time-subject index. To do this, break up the interview into chunks, according to either subject or time (every five minutes or less). The more details included, the better. This a great alternative for those who may not have the time to do a full transcription OR it can be a helpful additional resource to include alongside the transcription.



### #4: TIMECODING

Time coding is a process that makes information on recorded interviews accessible by subject. Basically, it is a digital time-subject index. Using digital playback software, you can add track marks with annotations into audio files. These track marks can then be embedded in the time-subject index and/or transcript. As a result, a person reading the time-subject index and/or transcript can link to corresponding sections in the audio files.

## DEPOSITING YOUR PROJECT IN A REPOSITORY

Organize your interviews and all supplementary materials according to the requirements of the repository you chose at the onset of your project. Once everything is in order and you have plenty of copies, deposit your project with your depository. Nice work!

## PUBLICITY

You're done! Well... kind of. You could stop here but you also have the option to shift your focus to public outreach. In other words, how can you package your project in ways that might reach wider audiences and leave a greater impact? Consider the following possibilities and brainstorm your own:

- Presentations (video/audio productions, PowerPoint, etc.) that incorporate your recordings, collected artifacts, etc.
- Events, workshops, and other gatherings that provide a space to share you work with the community
- Incorporating your work into lesson plans and other resources for primary and secondary education
- Connecting with local newspapers
- Connecting with magazines and/or journals focused on oral history and/or your topic of interest
- Appearances on radio shows or podcasts
- Creating a website that makes your project accessible and engaging
- Tours of sites relevant to your work
- Museum exhibits
- Art based on oral history stories - plays, monologues, musical compositions, etc.

