

The UCI Libraries Oral History Toolkit

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Introduction

The UCI Libraries Oral History Toolkit is a free resource designed by the Special Collections and Archives Team for our community members, whether you are interested in conducting a single oral history interview or implementing a large-scale project to document a community or historical event. These six modules can be adapted and scaled to your specific needs. We highlight resources that our community members continue to request, such as sample consent forms, strategies for enhancing access and long-term preservation. Our commitment to fostering [community-centered archives](#) (supporting the preservation and access to underrepresented histories) is the driving force behind this Toolkit. This is a living document that we hope to enhance and grow with community feedback. Please contact ocseaa@uci.edu if you would like to get in touch with us.

Module 1: Getting started.

Why do oral history? This module provides a general definition of oral history and explains how it fits into our community-centered archives principles.

Module 2: Designing your oral history.

Think through issues such as ethics, partnerships, goals, scope, support, audience, and access as you design your project.

Module 3: Preparing to interview and checklists.

This module will help you prepare for your interview and offer checklists

Module 4: Interview day.

This module will walk you through the day of your recording - what you need to keep in mind before you start your interview as well as give you pointers during and what to do after your interview.

Module 5: After your interview.

Now that you've finished recording your oral history, there are a few more steps you can take in order to feel confident that you are stewarding your research well.

Module 6: Care for your oral history project.

What steps should you take to preserve and publish your oral histories? This module will walk you through next steps.

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Module 1. Getting Started

What is oral history?

The **Oral History Association** provides the following definition:

Oral history is a field of study and a method of gathering, preserving and interpreting the voices and memories of people, communities, and participants in past events.

As a method, it involves an interview, typically between an interviewer and a “narrator” that is recorded and made available for the public. We recommend utilizing “narrator” over “interviewee” as the term “interviewee” can become confusing between the two roles. “Narrator” connotes a sense of agency for the person telling their life story. Oral histories become primary sources that supplement and enrich our collective understanding of places, communities, and events in the past.

Historical background

Oral history is both the oldest type of historical inquiry, predating the written word, and one of the most modern, initiated with tape recorders in the 1940s and now using 21st-century digital technologies.

Researchers have utilized oral history across a range of disciplines in the social sciences and humanities to capture experiences, perspectives, and sentiments of everyday people. When we combine the particular and situated knowledge provided by oral histories with broader contexts such as social movements, war, migration, pandemics (to name a few major events), we may arrive at more broad and nuanced awareness about the ways that people lived, the choices they made, and the agency they might have been able to exert over their lives.

Why do oral history?

Listening to and capturing the life stories of an individual is an opportunity, a privilege, and perhaps even challenge. Oral history creates an opportunity for individuals to pass on their knowledge, experiences, and memories in their own words. This transmission of cultural memory can be an empowering tool for the narrator sharing their stories, the listener/interviewer who is privy to this firsthand account, and the researchers who use the oral history to learn about the past. Oral histories can accomplish the following:

- Enrich and diversify the historical record
- Account for fuller, more comprehensive perspectives than interviews
- Empowers the narrator to tell their story and experiences
- Capture multiplicity of experiences and viewpoints in history

Oral history vs. interview

It is helpful to understand the differences between an oral history project and an interview project by defining their intended uses. An interview seeks to gain information, very directly, about a specific event, time, experience. They are often short and focused, driven by the interviewer's topic. Oral histories are often defined by the intention of creating primary source materials that should be preserved and made available for a wider audience.

Community-centered archives approach to oral history

Oral history has existed for much longer than the professionalized form it has taken since the 1940s in the United States. Oral traditions and storytelling practices are part of the traditions of cultures around the world. The modern approach, however, rests on the work of (1) recording, (2) preserving, and (3) making available these life stories. These three aspects are crucial to the way that knowledge about underrepresented communities can be created and circulated. In its intention to address the gap in historical knowledge, oral history methods have the potential to enhance our work in building more inclusive archival collections. UCI Special Collections and Archives are committed to partnering with communities whose histories are underrepresented in archival institutions. Our principles for community-centered archives involves being:

- Attentive to inequities reflected in archives: An institution should seek to understand how communities have been misrepresented, absent, or maligned in historical documentation.
- Responsive to the community's needs: An institution must be flexible, adaptable, and take an iterative and ethical approach to responding to how community memory and evidence is preserved, described, and made accessible. This means being willing to bend and stretch how archival work is defined to reflect what matters to the community.
- Collaborative through shared authority: In a community-centered approach, the institution focuses on shared authority, making decisions together and respecting the value, expertise, and perspective brought to the partnership by the community.
- Cognizant of the divergent priorities of communities: Community-institution partnerships must vary depending on the needs of each community, from the level of involvement by specific contributors to decisions about what archival material to collect.

Our "community-centered archives" approach can be explored further [here](#).

Sidebar links:

[Oral History Association](#)

[International Oral History Association](#)

Module 2. Designing your oral history

Ethics and consent/release

What is the obligation of the oral historian to their narrators in the process of eliciting life stories, preserving them, and providing public access for others? Arguably, one of the most important aspects of designing your oral history is to think through the process of informed consent. What is informed consent? Informed consent in research involves describing the project and its outcomes, giving the narrator a clear understanding of their role and their ability to make decisions about what to share and the ability to opt out, and ultimately gaining the narrator's consent to record, preserve, and provide access to their life story. While oral history projects are generally exempt from [Institutional Review Board requirements](#), it is always in the best interest of all parties to include a consent/release process in order to ensure participants are informed and comfortable with sharing their stories. Typically, the narrator and interviewer will sign a consent/release form if they are working with a repository to archive the oral history. See [Module 3: Preparing for Interview](#).

Considerations for consent/release forms:

- Getting these signed virtually: If you are conducting oral histories virtually there are various ways for your narrators to sign consent forms. You can utilize DocuSign (institutional), Adobe, scanning, printing and signing and taking pictures of the form, or snail mail.
- Preferred names, requests for anonymity and [pronouns](#). See: **OC&SEAA Narrator Biographical Survey**.

Community partnerships

Community-centered archives depend upon collaborative partnerships between mainstream archival institutions and communities that are underrepresented in the historical record. If you represent or are affiliated with an institution and plan to develop an oral history project see [Module 1](#), especially information on the “Community-centered Archives Approach to Oral History.” Historically, institutions have used extractive practices when doing research on communities by not ensuring equitable goal setting or outlining clear expectations with community partners. It is imperative for institutions to do and expect better of themselves to partner with communities in equitable and transparent ways.

If you are thinking about doing an oral history project on or about a community, work directly with the community to set goals and define the project scope. Work with the community to develop a memorandum of understanding (MOU). A MOU is a document between at least two parties that outlines a proposed agreement between them and sets clearly defined expectations for the project outcome and management. A MOU is helpful to have because it can offer equitable representation between project managers and community members and is an opportunity for community members to express their input in the development of the project. See: **Community-Centered Archives Partnership Memorandum of Understanding**.

Set your goals

These questions will help determine your outcomes: (1) What is the purpose of your project? (2) Who is your intended audience? When you begin to conceptualize your project, it is important to do some background research to determine what oral histories have been done on the subject before.

Background research will help you articulate a clear vision and what specific contributions your project will make to the historical record. Acknowledging your intended audience will also help you shape the scope of your project and develop interview questions. For example, if your audience is people within a specific affinity group or age group, you may decide to frame your questions in ways that speak directly to your audiences' experience. Consider creating an **Oral History Project Plan** (see in sidebar) to set goals and map out your project.

Whoever your intended audience, we recommend sharing your interview questions with the narrator, and if applicable, the community or organization with whom you are working on your oral history project. This will give those with direct knowledge and experience an opportunity to advise on terminology, etc. used throughout in the questions. This helps to promote a true partnership with the narrator and community with whom you are working and transparency about the goals of the project.

Consider the project scope

- Consider the breadth and depth of the overall project when you choose a name for your project. You might want to consider how the name may impact how narrators and the public might interact with the oral histories once they become available. Also, there are pragmatic considerations such as the ease of pronunciation and how easily the name might be included in a website URL.
- How large will your project be? How many people do you want to interview? We often use the term "Narrator" to refer to interview subjects, although in some cases it may be preferable to use other terms such as "Storyteller" or "Elder."
- What time period, geographical boundaries, or event(s) will your project focus on?
- Depending on how large your project will be, it will be helpful to design a spreadsheet or Google Form for inclusion of multiple recordings being submitted by multiple people. This will help with tracking your project by (1) Creating project-level metadata (2) Helping participants submit files such as consent forms, photographs, etc. (3) Enumerating the number of recordings you expect to receive (i.e. OH#_____).
- What are the desired outcomes or products of your oral history? What products will help you achieve your goals? For example: audio recordings, video recordings, transcripts, public access

platforms to the raw oral histories or curated publications such as digital exhibits, physical exhibits, or book manuscripts

- Who are the key players of your oral history project?
- Who will be the interviewer(s)? Will they be students? Will they come from the same background as your potential narrators? Will they have language skills that are essential to the narrator or population you are trying to include in the project? The interviewer role is vital to the success of an oral history, so be sure to consider your options.
- Who will be your narrators and how will you elicit their participation? It is important to articulate age range, geographic location, or other facets of your potential narrators' lived experiences that you are trying to capture.
- Create your interview questions. You may want to involve your interviewers or survey potential narrators to come up with questions appropriate for the experiences you would like to capture the project. One strategy that works well is to have baseline questions about the biographical details of a person's life as the "warm up" questions in the beginning of the interview, followed by questions that might require more reflection or be more sensitive in nature.

Getting support for your project

The scale of your oral history project will depend on the type of support you will need. Oral history projects can be done with minimal cost. With high quality digital recording available for many people on their personal devices, an individual wishing to record their family history through an independent oral history project can get started with little to no start-up costs. However, when you decide to increase the size of your narrator pool, involve more interviewers, and work with a repository for long-term preservation, the costs are likely to increase to support labor costs. Other considerations for oral history costs might include: stipends/gifts for narrator participation, specialized tools for recording, transcription, asset-management software, and dissemination (e.g. the domain cost for a website), transcription or translation services, expert consultation fees, hard drives or server costs for long-term storage. To fund your project, you might consider:

- Seeking grants that align with your objectives. Some major funders that have supported oral history projects include National Endowment for the Humanities, California Humanities, Mellon Foundation, and the Oral History Association. Grassroots or local funding sources may be preferable in instances when the oral history project you propose may illuminate aspects of the local community's history.
- Building partnerships with institutions/repositories/organizations that may align with your vision to offset some of these costs and bring in additional expertise.

- Seeking crowd-source funding for your project with various campaigns such as Kickstarter, GoFundMe, etc.

Audience and access

It is important to consider how you plan to provide access to the oral histories at the early stages of developing your oral history project. Protecting narrator and interviewers' privacy as well as, ensuring that your intended audience can access the oral histories are necessary considerations. Additional questions to consider include: Will you provide sensitive information that you would not like to share right away? Will your narrators have reason to fear their personal safety or the safety of someone they know based on what they reveal in their interview? Do you plan to donate the oral histories to an institution, and if so, does this institution have a history of neglecting or supporting communities represented in the oral history project? (See section VI. B)

For long term access to the oral histories on the web, consider the following:

- Does the narrator fully understand that their oral history will be publicly available on the internet?

The role of the project director and interviewer is to ensure that the narrators are well-informed of this process and won't be surprised that their oral histories are still on the internet after many years. Thinking this through at an early stage will assist in your selection of and communication with potential narrators

- How will the narrator or other concerned party contact you or the website administrator regarding concerns? Who will respond to concerns? For example, what process is in place if a narrator would like to remove their oral history from a digital platform?
- Do you (as project creator) understand your partner institution's process for when a narrator changes their mind and wants their oral history taken down?
- Is the narrator clear that their oral history can be shared or published to other websites? Are they comfortable with a partner institution having the power to make those decisions?

For more in depth information on access and long-term preservation see [Module 5](#) and [Module 6](#).

Sidebar links:

[OC&SEAA Narrator Biographical Survey](#)

[Community-Centered Archives Partnership Memorandum of Understanding](#)

[Oral History Project Plan](#)

Module 3. Preparing to Interview and Checklists

Introduction

Preparing for an oral history interview is important. Preparing in advance will offer opportunities to become familiar with topics relevant to your project, get to know and build trust with a narrator, and to test out your recording equipment. For more in depth information on the preparation, process, and products of oral history see [The Three P's of an Oral History Interview](#) in the sidebar.

Historically, in-person interviews have been the most common approach to oral history. Increasingly, remote interviewing has become a welcomed alternative. There are benefits, advantages, and challenges to both approaches. It is important for both interviewers and narrators to take time to determine which approach is best for them. Factors like: narrator's preferences, barriers to travel, project deadlines, and technology can inform a decision about which approach in-person, virtual, or a combination of the two is best. For more guidance on considerations for remote interviewing see the Oral History Association's decision tree [Considerations for Remote History Interviewing](#) in the sidebar.

Pre-interview meeting

Whether planning an in-person or virtual interview, schedule a pre-interview meeting for project participants. In most cases, this type of meeting is for an interviewer and narrator. In some instances, a portion of a pre-interview may also include project organizers and/or a videographer. A pre-interview meeting is an opportunity for narrators and interviewers to meet and to build rapport. At this time, the interviewer and narrator can go over the logistics of the project, consent forms, planned recording, and address questions or concerns. A pre-interview meeting is also an opportunity to test out the recording location and recording equipment. Note that it may not be possible to schedule a separate pre-interview meeting. If this is the case, set aside time at the beginning of your scheduled recording. See [Module 4](#) for more information on this.

What to expect

During the pre-interview meeting, let the interviewer know what to expect. Let the narrator know:

- Who will be in attendance
- How long the interview will last
- The technology you will use to record
- If recording remotely, any technology the narrator will need
- If recording remotely, offer instruction on how to operate the technology

The pre-interview meeting is a good time to go over a list of questions or topics that you plan to address during the recorded interview. You may choose not to go over the questions one-by-one during the pre-interview meeting. Ideally you will have sent the questions along with consent forms to your narrator ahead of time. For guidance on developing oral history questions see the [OC&SEAA Oral History Questions Tip Sheet](#) in the sidebar.

Consent forms, sometimes referred to as release forms, are a vital part of an oral history project. It is imperative that interviewers and narrators understand the intended purpose of the oral history project and how interviews will be stored, preserved, and shared with the public. By signing consent forms, the interviewer and narrator grant project organizers permission to be stewards of the oral history in the ways outlined in the consent forms. See the [OC&SEAA Photo Consent Form](#) and [OC&SEAA Interview Consent Form](#) in the sidebar for examples of forms used by UCI Libraries.

The pre-interview meeting offers an opportunity to ensure that the narrator has received this information and is given time to ask clarification questions or raise concerns.

Pre-interview recording

During the pre-interview meeting plan to facilitate a sample recording. This will allow you to test the recording technology. Talk about a subject that will not be part of the recorded oral history so your interviewee does not reveal an important story too soon. In order to check how the technology like the mic is working. If you are interviewing remotely, test to see if the recording is saved either on your local computer, external drive, or cloud. Also evaluate the environment and atmosphere. Tips on creating a positive atmosphere for an oral history interview are available. The pre-interview can be done in advance and the day of the interview (see [Module 4](#)).

Atmosphere and participant wellness

Regardless of the recording format you choose for your oral history project, it will be important to consider the environment in which both the interviewer and narrator will record. Ensuring a recording environment that is comfortable for project participants can help foster a positive experience for all. During the pre-recording meeting evaluate the atmosphere and background of the recording location. Factors like noise, foot traffic, lighting (if filming) can impact the quality of the recording. Consider the following:

1. Is there background noise?
2. Does the location provide privacy?
3. Can the interviewer and narrator hear each other?
4. For video recordings, is the lighting good?
5. For video recordings, is the background appropriate for the interview?

The personal and sometimes sensitive nature of storytelling can stir the emotions of narrators and interviewers. Whenever possible, stage a recording environment that takes these factors into account. Here are a few ideas for ensuring participants wellness:

1. Provide or suggest a comfortable place to sit for long periods of time
2. Take breaks
3. Keep water handy
4. Provide or suggest tissues within reach

It may not be possible to achieve certain conditions. The most important thing is to work with your narrator to create a recording environment comfortable for them.

Incorporating artifacts

Incorporating objects or props like photographs, maps, scrapbooks, or other materials into oral history recording is one way to help narrators recall their memories or experiences. Prior to recording, ask your

narrator to provide a list of the materials they will reference during their interview. If possible, have the narrator bring the materials to a pre-interview meeting so that you can make technical needs or adjustments prior to the official recording date. If an interviewer will provide these objects, the same suggestions apply. The interviewer should provide a list of the items to the narrator and bring these to a pre-interview meeting.

More on technology

Prior to recording an oral history, decide the technology(ies) you will use. This will entail considering the resources you have at your disposal, any additional resources you will need to obtain, and becoming familiar with how to use your chosen equipment.

In-person interview

Common recording devices for in-person interviews include:

1. Mobile devices like cell phones, tablets, and laptops
2. Zoom handycam or other recorders specifically designed to capture audio recordings
3. Digital cameras

Any of these or other devices can get the job done. Choose the device or devices that will work best for the interviewer, narrator, and intended recording environment. When choosing a recording device, take note of the recording file format. We recommend recording in .mp4 for video or audio and .wav for audio. Also take note of additional accessories needed to record, such as power cords, batteries, SD cards, and camera stands or tripods. Technology can be temperamental and unpredictable. Plan to use more than one device to record. Recording on multiple devices will ensure you have a backup copy of the interview.

Virtual Interviews

There are a number of tools that you can use to record a virtual interview. As with in-person interviewing technology evaluation, choose the tools based on what will fit your needs and skill level.

Potential Tools

- Mobile devices
- Zoom - Recording on the Cloud allows for automated transcription
- YouTube
- Google Meet
- WebEx
- Instagram Live or other social media recordings

These are just a few of the many options available. All come with their own set of pros and cons.

A few factors to take into consideration when choosing technology include:

- The recommended file formats are .mp4 for video or audio and .wav for audio
- Some technological tools have limited free versions. It may be advantageous to have a business or Institutional account for full functionality

- Not all recording technologies provide transcriptions. Automated is more efficient than manual transcription
- Explore requirements for backup recordings. For example, if you only have one person conducting the interview, run the audio app on your phone or tablet to capture the audio from the interview. In this scenario, you will want to be in a space that is free of background noise. If you have an interviewer and a tech assistant, one person should save the video recording on the cloud and one person should save the video directly on their computer (local recording).

Sidebar links:

[The Three P's of an Oral History Interview](#)

[Considerations for Remote History Interviewing](#)

[OC&SEAA Oral History Questions Tip Sheet](#)

[OC&SEAA Photo Consent Form](#)

[OC&SEAA Interview Consent Form](#)

Module 4. Interview Day

This module will walk you through what you need to keep in mind before you start your interview as well as give you pointers as you conduct your interview and what to do after your interview.

Introduction

Your interview day is finally here. Whether you will be conducting your interview in person or virtually, there are a couple of things you need to keep in mind the day of your interview that will help you and your narrator have a smooth recording experience.

Before you hit “record”

1. If you have not gotten your consent form signed by the narrator before the day of the interview, now is the time to get it signed. Some narrators may feel more comfortable signing the form after their interview. This is fine, but do not forget to get it signed immediately after the interview. It may be challenging to get it signed after you and the narrator part ways.
2. It may be a good idea to take a photograph or two of your narrator, particularly if you are doing an audio-only recording. It is also a good idea to photograph any visual aids the narrator makes reference to in their interview like photographs, scrapbooks, or any objects. Taking photographs can happen before or after your interview, or during a break. It is not a good idea to stop or interject to take a picture while your narrator is in the middle of speaking. If you choose to take photographs, please have your narrator sign a photo consent form, see **OC&SEAA Photo Consent Form**.
3. If this is your first time meeting the narrator in person (or virtually) it is a good idea to ask for the correct pronunciation of their first and last names, preferred names, and their pronouns.
4. If you and the narrator discussed incorporating artifacts in your interview now is the time to ask if they brought them. Make sure they are handy during the recording.
5. Ensure your and the narrator’s physical comfort. Are you and the narrator physically comfortable and are you able to sit comfortably for the duration of the interview? Before you start recording, ask the narrator if they have everything they need. [See Module 3: Atmosphere and Participant Wellness](#) for a refresher.

6. Pause and get collected. You and/or the narrator may get emotional during the interview, so taking a moment for both of you to prepare is a great way to ensure no one feels blindsided by the interview process.

Conduct a practice session

While you may have already conducted a pre-interview recording as advised in [Module 3](#), it is a good idea to conduct another practice session the day of your interview in case has changed.

1. Test the volume, sound, lighting (for video), background, and positioning of your recording device by recording a short (1-5 minute) practice session.
2. Ask the narrator to talk about a subject that they do not plan to discuss as part of their oral history. The reasoning behind this is that the affective impact of something that is revealed the first time is not as strong when it is rehearsed or is mentioned the second time. You do not want your interviewee to get started on the planned topic of discussion too soon.
3. As mentioned in [Module 3](#), building rapport with your narrator is important and the practice session is a good opportunity to establish it. Your narrator will share personal experiences with you and so they might feel vulnerable. Attempt to put your narrator more at ease by sharing something about yourself.

Beginning of interview

1. State your name, time, date (with day of the week) and place (if conducted virtually, state your location first), introduce your narrator (if conducted virtually, state narrator's location).
2. Introduce the topic of the interview and provide context that will lead up to the first question.

Example: Hello my name is Peter the Anteater, today is Friday, October 30th, 2020. It is two o'clock in the afternoon. I am conducting this interview virtually in my home in Long Beach, California. I am here with Chancellor Howard Gilman who is conducting this interview from his home in Irvine, California.

During the interview

1. Listen, listen, listen. Even though you came prepared with a list of questions, the narrator is sharing a piece of their lived experiences and sometimes unexpected events, people, stories are revealed. Instead of following your script, allow for a more fluid interview by asking follow up questions based on what the narrator reveals. If the narrator mentions the name of a person that is relevant to the topic being discussed, ask them to provide contextual information that will help researchers know more about this person and their role in this particular topic.

2. If the narrator is going too far off into a tangent use your list of questions to help them back to the subject.
3. Maintain the focus of the interview on the narrator and their story. Do not insert your opinions or make too many audible agreement or disagreeing noises (i.e. “yes,” “okay,” “mmhmm,” etc.). Feel free to nod, smile, or give the narrator other non-verbal clues to communicate with them how you are feeling.
4. Write field notes as you listen to the narrator. Sometimes narrators are revealing many interesting facts at once that it may be challenging to follow up on all of them. Writing down your observations and questions as the narrator speaks will help you with asking follow up questions and crafting the direction of the interview, see **OC&SEAA Sample Field Notes**.
5. Supply your narrator with paper if they need to communicate something to you that they do not want to voice (need for a restroom break, need to stop, etc.). This can be tricky in the virtual environment but assure the narrator that the recording will be edited accordingly.
6. If there are other people there to assist or listen, supply them with paper (or ask them to write their comments or questions in advance) so that they can jot down their follow up questions and slip them to you. Ideally you want to limit the number of speakers in the interview to just the people who were introduced at the beginning of the recording. If you have other members present, ask them to help you document key events, people, dates via a time log. A time log is a document that outlines the topics discussed along with a timestamp for when it was discussed, see **OC&SEAA Sample Time Log**.
7. Remember to bring up the use of artifacts or visual aids if the narrator mentions them. Ask them to describe the object (date and location of creation) and give as many visual cues, particularly if you are recording audio-only.
8. At the end of the interview have a brief concluding statement. An example is, “This concludes our [date] interview with [narrator’s name]. [Narrator’s name] thank you for participating in this project.”

After your interview

After the recording, make sure the narrator understands how these interviews will be available, and communicate your projects’ next steps. You may have already had this conversation with your narrator but it may be a good idea to remind them where, when, and how this interview will be accessible at the end of your interview. Thank them for their time and remind them about the importance of their contribution.

Take the time to process your experience of being an interviewer/listener in order to be attentive to your wellness during this oral history journey. There are several approaches you may consider such as journaling or writing field notes about the experience, reading and exploring additional resources related to the interview you have just conducted, talking to a peer or colleague about the experience, or seeking the counsel of a trained professional such as a therapist (this is especially helpful if you have interviewed a number of people who share stories of trauma). Self care and self awareness are essential components of the oral history process and should be given the time and space in any oral history project.

Sidebar links:

[OC&SEAA Photo Consent Form](#)

[OC&SEAA Sample Field Notes](#)

[OC&SEAA Sample Time Log](#)

Module 5. After your interview

DON'T QUIT NOW!

Devoting attention to description and metadata at all stages of the process is an essential part of any oral history project.

Now that you've finished recording your oral history, there are a few more steps you can take in order to feel super confident that you are stewarding your research well. In this section we will explore tools and practices that will help ensure that your work stays accessible and is ready for preservation.

Create an oral history final checklist

Refer to the **OC&SEAA Final Checklist** in the sidebar, or create your own similar checklist, to make sure you have all the necessary components and signed consents for your oral history.

Metadata

Metadata are specific bits of information about your recording(s) that will enable discovery and access in the future. During your interview, be sure to document the following:

- Descriptive metadata: Names of individuals interviewing and being interviewed, time and place of interview, topics of conversation.
- Technical metadata: Information about the recording device used, the type of audio file produced (mp3, wav), the various version(s) of the files (i.e. is this the original or has it been edited, which edit is this?), length of recording, and size of files.
- Rights and access metadata: Who will be allowed to see/listen to this interview, will it be restricted for a certain number of years or restricted to a certain community of listeners/viewers? See [Module 2: Getting support for your project and Audience and Access](#), or refer to **Submitting Your Pandemic Histories Archive Tip Sheet** in the sidebar.
- Administrative metadata: Information about who “owns” the oral history. Some possible owners are the interviewee, the interviewer, the project coordinator, or the institution who is paying for the project. We recommend you have clarity on this before you begin recording your oral histories.

File naming

Using structured file names is an easy way to preserve your oral history; consistent naming of files makes finding files later much easier. Each oral history should have a unique identifier assigned to it, and the files you create should contain that unique identifier and other bits of information that explain what they are

without having to open them. Refer to [OC&SEAA File Naming Guidelines](#) or [Submitting your Pandemic Histories Archive Tip Sheet](#) in the sidebar for more information.

Deep dive: creating file names

Create a unique oral history identifier.

1. Create an abbreviated name of the project or acronym that the team agrees on and that will make sense long into the future (e.g. “Kerry’s Oral History Project” as “KOHP”).
2. Add numbers to the end of the abbreviated project name to create a unique oral history identifier (ID). Add zeros before the number to allow for oral history IDs to grow beyond 10, 100, etc.
Example: KOHP0001, KOHP0002, KOHP0003, KOHP9999.
3. Document the oral history ID on all accompanying papers such as consent form, interview notes, etc.

Construct your file names.

1. When creating file names, the broadest information about the file should be on the left and get more specific as you move right. Use an underscore “_” to separate bits of information.
2. After the oral history ID, the next bit of information should reflect what type of file this is. Create simple codes to reflect the types of files you are naming. Be sure the codes will make sense to you and others into the future. If you’re working with a team, get consensus on what makes the most sense for everyone.
 - Examples: A = audio, V=video, P=photograph, T=transcript; document these abbreviations in your notes and create a key to refer to later
3. For each instance of each file type, add a number to that extension. Think ahead about how many of that type of file might be included and include zeros to make space for more than 10, 100, etc.
 - Examples: KOHP0051_P11 (11th photo for oral history KOHP0051), KOHP3231_P65 (65th photo for oral history KOHP3231)

If all of this feels overwhelming, try to at least be consistent when creating and naming new files.

Create a folder for your digital files

Open a new folder on your computer and name it the name of your project. Place all of the important documents (project plan, consent forms, notes) and oral history files (audio, video) in this folder. This will help you to easily find your files as you move through the project. You can create folders in Google docs, Finder (on the Mac) or File Explorer (on PC).

Transcription

Transcriptions are valuable tools for providing access to oral histories to a variety of audiences. It is important to acknowledge that folks have different levels of resources (access to computers with audio capabilities for example) and abilities (we all process material differently). There are a variety of ways to create a transcription of your oral history. These include automatically generated transcripts through video recording platforms like *Zoom* and *YouTube*, and manually typed transcriptions. Some tips for creating transcriptions are below.

- **Zoom:** Automated transcription is available when “Cloud recording” in Zoom. A transcript could take a few hours to be delivered depending on the length of the Zoom video. The transcript will still need to be edited and checked for the spelling of names and places.
- **YouTube:** Setting up a private YouTube channel is recommended. Use this channel for uploading oral histories while they are not read for public access. Automated transcription becomes available after a video is uploaded. The transcript will need to be formatted and edited for spelling of names and places.
- **Other transcription tools:** Google docs, Vimeo, [Web Captioner](#), and smartphone apps for transcription; see [Best free way to automatically transcribe your video](#) (YouTube).
- **Manual transcription:** Suggested transcription template includes (see **UCSD sample transcript** in the sidebar):
 1. Title
 2. Date
 3. Collection name
 4. Length of interview
 5. Link to the recording
 6. Transcriber name
 7. Time coding with transcription

Tools such as ExpressScribe can help speed up the manual transcription process. For more information see **OC&SEAA Transcribing Guidelines** in the sidebar.

Write an abstract

An abstract is a summary of the topics covered in the interview. Its purpose is to give the user (i.e. readers, listeners, researchers) of the oral history an idea of what the interview contains without providing detail of what the interviewee says. (See: **OC&SEAA Abstract Tips Sheet** in the sidebar)

Tips for writing the abstract:

1. The abstract is only a guide to the contents of the recording (150-200 words).

2. Use the interviewee's full name in the first sentence and then shorten it thereafter (first name or title and last name).
3. Write in the present tense when referring to the interview content.
4. Begin with a sentence that introduces the interviewee, his/her/their birthplace, and description about the oral history project.
5. The body of the abstract can include topics like: defining characteristics, achievements, family description, education background, and previous and current occupations.
6. Let the purpose of the oral history project guide the content of your abstract.
7. Use words like "explains," "describes," and "mentions," to give the user an idea of what is included in the interview and how much material there is on a particular topic.
8. Quotes help to give an idea of how the interviewee speaks, but should be used sparingly; you are not making a transcript.
9. End with points that were interesting but may not be central to the interview.
10. Consider including a list of keywords/topics relevant to the individual interview and the overall oral history project.

You are encouraged to browse the [Vietnamese American Oral History Project](#) for examples of oral histories with all of their component parts (audio files, transcriptions, time logs, and abstracts/summaries) and well-formed file names.

Sidebar links:

[OC&SEAA Final Checklist](#)

[OC&SEAA File Naming Guidelines](#)

[Submitting Your Pandemic Histories Archive Tip Sheet](#)

[UCSD sample transcript](#)

[OC&SEAA Transcribing Guidelines](#)

[OC&SEAA Abstract Tips](#)

[Vietnamese American Oral History Project](#)

Module 6. Care for Your Oral History Project

When designing an oral history project, do not neglect to include a mid- and long-term plan for care, preservation, and access to the records you create. Consider where to store your files and who is responsible for the long-term management of these files so that you and others can access them in the future.

Independent projects

Backup your files

It is a good idea to store your files in multiple locations to ensure redundancy and plenty of safe back-ups in case of loss. Remember: **Lots Of Copies Keeps Stuff Safe (LOCKSS)** (see sidebar). Examples of different types of locations include: hard drives, thumb drives, networked servers, cloud storage options like Google Drive, Dropbox, Box, etc. Document the locations for long-term storage.

What should you preserve?

Consider long-term preservation of these different files for your project:

- Copies of original recordings (.wav, .mp4, .mov)
- Copies of edited recordings (.wav, .mp4, .mp3)
- Transcription (.pdf)
- Signed consent forms (.pdf)
- Description of the project and owner(s) of the recordings
- Metadata (information about each recording)

Publish your oral histories

There are a number of good hosting options, including:

- File hosting in YouTube and access via Google Sites
- Omeka or Omeka-S for hosting and access, including metadata standardization. For an example built on Omeka see: **The People's Archive of Police Violence in Cleveland** (see sidebar).
- Several organizations provide hosting and collaborative digital humanities tools to provide enhanced points of access for oral histories. For example: the [Knight Lab at Northwestern University](#).

Before publishing your oral histories on a web platform, consider these long-term stewardship questions:

- Who will make sure, for the long term, that the website is secure, that it will not be tampered with, and that the urls and oral histories stay valid into the future?
- Does the narrator fully understand that their oral history will be publicly available on the internet?

The role of the project director and interviewer is to ensure that narrators are well-informed of this process and won't be surprised that their oral histories are still on the internet after many years. Thinking this through at an early stage will assist in your selection of and communication with potential narrators.

- How will a narrator or other concerned party contact you or the website administrator regarding concerns? Who will respond to concerns? For example, what process is in place if a narrator would like to remove their oral history from a digital platform?

Institutionally affiliated projects

Discuss expectations and support

If you have entered in a partnership with an archival institution, you will have access to more hosting and access platform options. Additionally, long term preservation and access care can also be provided by institutional staff. Be sure to discuss your project with potential archival institutions for guidelines on preparing oral histories for long term preservation and access. In many cases, a Memorandum of Understanding (MOU) can provide documentation for clarifying roles, responsibilities, and desired outcomes. See [Module 2](#), Community Partnership section for more information about developing a MOU.

Considerations for choosing an archival institution

Have an open discussion about your needs as project manager. If you are working with a community, also advocate for this community's needs and expectations, or invite members of the community to be present when you are meeting with this institution. The following questions will help you prepare for this discussion and help you understand what this institution is willing to provide your project and whether it is the best long-term home of your project:

- What are the institution's collecting areas? Does your project's scope fit with their existing collecting areas?
- What is the institution's relationship with the communities represented in the oral histories? Do they have examples of projects they have worked on with these communities?
- What are your expectations regarding access? Does the institution foresee any use of the materials in the project (i.e. used for class instruction)?
- How will the institution be making the oral histories available? Are they able to accommodate any embargo dates, if present?
- What relationship do I have with the institution? What about in the future?

- If you made a project website, can the institution provide web archiving services to preserve this website? This will allow you to sunset the website and point to the archived version of the site.
- What will be the ongoing relationship with the institution?

Consider these long-term stewardship questions:

- Do you (as project creator) understand the institution's processes for when a narrator changes their mind and wants their oral history taken down?
- Is the narrator clear that their oral history can be shared or republished to other websites by the institution? Are they comfortable with a partner institution having the power to make those decisions?

For example, at UC Irvine, an oral history in the Viet Stories collection that has been published on [UCISpace](#) has also generated a record on [Calisphere](#) (California Digital Library), and the [Digital Public Library of America](#). In order to honor takedown requests, several cross-institutional partners including librarians, digital collection administrators, and IT professionals must be involved in the process.

Sidebar links:

[Lots of Copies Keeps Stuff Safe \(LOCKSS\)](#)
[The People's Archive of Police Violence in Cleveland](#)