

**UTAH HUMANITIES / UTAH DIVISION OF STATE HISTORY  
INTRODUCTION TO ORAL HISTORY  
For Joint Oral History Grant Program**

1. Definitions of Oral History
2. Why We Collect Oral History
3. Oral History Projects – Process & Management
4. The Interview – How to Proceed
5. Transcribing the Interview
6. Legal Issues and Agreement Forms
7. Bibliography and Useful Resources
  - A. Books on doing Oral History
  - B. Utah history books that are based on oral history
  - C. Other Useful Resources
8. Oral History Association Guidelines: General Principles and Best Practices for Oral History

## 1. DEFINITIONS OF ORAL HISTORY

### What is Oral History?

"Remembered Experience." (Thomas L. Charlton)

"Recorded interviews which preserve historically significant memories for future use." (Charles Morrissey)

Oral History is three things:

1. research method that involves in-depth interviewing
2. recorded memoir
3. typewritten transcript

### First Hand Knowledge

Oral history is the tape-recording of reminiscences about which the narrator can speak from first-hand knowledge. Through pre-planned interviews, the information is captured in question and answer form by oral history interviewers. (Willa K. Baum, *Oral History for the Local Historical Society*, p. 1)

Oral History is the tape recording of a knowledgeable person, by questions and answers, about what he/she did or observed of an event or events or way of life of historical interest. The purpose is to preserve that account for users, both present but especially future users, and make it available for us." (Willa K. Baum, "The Other Uses of Oral History," *Oral History Review*, Winter/Spring 2007 Volume 34 # 1)

Oral history interviews differ from journalistic or specific historical research interviews in that they are intended for use in the future by a wide variety of researchers; therefore their scope should be broader than what would be covered for immediate or specific use. A plan for preservation and use is essential to oral history. (Willa K. Baum, *Oral History for the Local Historical Society*, p. 1)

The use of oral history has democratized history and as the widening of history has broadened, so has its content. Much of the new social history is based on oral history.

Oral histories may indeed be a modern-day counterpart to nineteenth-century migrants' diaries, letters, and memoirs: they can reveal much about first-hand experience, even as we continue to ask what other narratives have helped shape the reminiscences themselves. (Scott E. Casper, Introduction to *Moving Stories: Migration and the American West: 1850-2000*).

### Goals for Oral History

1. A good, accurate historical account of what happened;
2. First-hand—that is, not folk tradition, not oral hearsay;
3. Questions and answers
4. It is preserved, that is, safe in a library;
5. Available, that is, legally open for research; and
6. Findable, that is, it is possible to find information within the transcript or tape.

(Willa Baum, "The Other Uses of Oral History," *Oral History Review*, Winter/Spring 2007, p. 15)

## General Principles for Oral History

- 1) Distinguished from other forms of interviews by its **content and extent**.
- 2) Oral historians **inform narrators about the nature and purpose** of oral history interviewing in general and of their interview specifically.
- 3) Narrators **hold copyright to their interviews** until and unless they transfer those rights to an individual or institution via release form.
- 4) Oral historians **respect the narrators** and the integrity of the research.
- 5) Because of the importance of context and identity in shaping the content of an oral history narrative, **narrators should be identified by name**.
- 6) Oral history interviews are **historical documents that are preserved and made accessible** to future researchers and members of the public.
- 7) For long-term preservation and access, oral historians should use the **best recording equipment available** within their financial limits.
- 8) Interviewers should **avoid making promises** that cannot be met.

## 2. WHY WE COLLECT ORAL HISTORY

- To **gain information and knowledge** about a person, place, event, or time that is not available in other sources
- To bring **uniqueness** to history
- To **interact with others** through collecting their history
- To **give voice to people** who otherwise would go unheard
- To **validate** the lives of others
- To provide an understandable and very human **link for young people and newcomers** to a community to the immediate present or recent past
- To **have fun** – interviewer, narrator, and others!

It is part of our effort to preserve the past—an effort that includes preserving historical records, documents and photographs, preserving and restoring historic sites, writing histories, placing markers, offering historical tours, lectures or other programs.

Oral history offers an opportunity to fill in the gaps especially in our technological world of telephones, e-mail, face-to-face meetings.

There are many classes of people who will not set down in writing the description of their way of life although they may have a very rich oral tradition and may be able to talk with much color and accuracy about this life. (Willa Baum, *Oral History for the Local Historical Society*, 3)

Oral history can serve as a link from the immediate present to the immediate past in an understandable and very human way that can give the young and the newcomers a way of sinking their roots into the community. (Valerie Raleigh Yow, *Recording Oral History*, 15)

The in-depth interview can reveal a psychological reality that is the basis for ideals the individual holds and for the things he or she does....Closely related to psychological disclosures is the way individuals see their own histories, both personal histories and the history of the group with which they identify....They had felt a need to make clear the place that their group and they as individuals occupied in history. (Valerie Raleigh Yow *Recording Oral History*, p.15)

I have found that people tend with the passage of time to be more rather than less candid. When a career is in progress, there is much to lose by an untoward admission. Near the end of life, there is a need to look at things as honestly as possible to make sense of experiences over a lifetime: This need strongly competes with the need to make oneself look good. (Valerie Raleigh Yow, *Recording Oral History*, p. 18)

We collect oral histories to use them—in books, articles, exhibits, tours, family histories, films, pageants, programs, and in other ways that help illuminate, depict, and explain our human experience.

By participating in oral history projects—from the most naïve to the most sophisticated, from grade school to college—students and teachers learn that education is not something you receive and imbibe (or impart and impose), but rather something you create. In oral history, one is part of the creation of the sources. Instead of studying only texts written by others, or examining documents written by others, the students work on sources of their own creation and thus become aware of how sources are created at the same time as they take an active, protagonist, hands-on role in their own education. (Alessandro Portelli, Oral Historian and Professor of American Literature, University of Rome—Forward to *Preparing the Next Generation of Oral Historians: An Anthology of Oral History Education* \_By Barry A. Lanman and Laura M. Wendling, p. xiv)

Oral history can be fun for the interviewer, the narrator, and anyone else concerned with the work.

I count now my fortune in the treasury of lives opened to me in trust, they live in me, resonate in me, and teach me every day that no age or event can of itself prevent the human spirit from outstretching its former boundaries. (Gail Sheeny, *Passages*,)

Oral History allows the community to recognize and honor individuals by the implication that their lives do count, that what they did does matter and that it has value to others. (Kent Powell)

### History and Oral History

- Oral history recognized as important source for historians but one to be used with care.
- Think about whether oral history is “more history” or “anti-history”?
- Oral history creates own documents—this is unique—but they are documents not created in the past but in the present. What might this imply?
- Incorporating into narrative histories requires careful thought—reflection—on the purpose, creation, and veracity of the interviews.

### 3. ORAL HISTORY PROJECTS – PROCESS AND MANAGEMENT

#### Oral History Process - Summary

- 1) Pre-Interview
  - ✓ Explain what an oral history interview is
  - ✓ Prepare a general chronology and list of topics
  - ✓ Interviewee to sign Release Form
  - ✓ Photograph of Interviewee
- 2) Interview(s)
  - ✓ Follow-up questions
  - ✓ Plans for the next interview
- 3) Transcribing
- 4) Audio Editing
- 5) Interviewee Edit
- 6) Release Form
- 7) Final Edit and Corrections
- 8) Placement and Distribution of Copies
  - ✓ Interviewee
  - ✓ Repositories
  - ✓ Others

#### Organizing Oral History Projects

##### *Planning Questions:*

- How will the community (or others) likely view the project while it is taking place? After it is finished?
- What are the basic aims of the oral history project?
- How will you inform the community about the project?
- Who will use the tape recordings and transcripts in future years?

##### *Setting Goals:*

- What is needed (funds, equipment, people) to reach the oral history project's larger goals?
- What aspects of the project's goals are unrealistic?
- Should some goals be postponed or eliminated?
- What are the group's principal assets? And your limitations?

##### *Schedule and Timeframe:*

- When can we reasonably expect to complete the project?
- What is our timeframe?
- How much can we accomplish in a reasonable period of time?
- Should this factor cause us to refocus our goals?

##### *Write it Down:*

- General and specific goals
- Potential interviewees
- Project "givens" such as deadlines and finances
- Individual assignments and priorities
- Develop a written checklist for monitoring and evaluating the project
- Discuss, update, revise over course of project

### The 20 Step Process

(Barbara W. Sommer and Mary Kay Quinlan, *The Oral History Manual*, pp. 7-12)

1. Identify key leaders and project personnel
2. Name the project and write a mission statement
3. Decide who will own project materials
4. Determine the equipment to use in the interviewing and transcribing
5. Develop a project budget
6. Find funding sources
7. Select a project advisory board
8. Establish a timeframe for completing the project
9. Establish record-keeping procedures
10. Develop a publicity plan
11. Train your interviewers
12. Begin background research on the project topic and compile a bibliography
13. Use the research to create an outline relating to the topic
14. Make a list of themes or topics to pursue in the interviews
15. Identify potential narrators and determine the topic or themes to be covered in interviews with each of them
16. Begin narrator-specific research
17. Develop the interview outline
18. Schedule the interview
19. Conduct the interview
20. Process the materials

#### 4. THE INTERVIEW – HOW TO PROCEED

##### The Interviewer

The interviewer should be someone who can sit quietly and listen, who is willing to let the narrator express an opinion contrary to his own without feeling compelled to contradict or re-educate the narrator, who is not afraid to break in occasionally with a question or guiding comment, who is firm enough to end the interview on time and to keep it within the bounds of whatever lines of inquiry have been planned, who is alert enough and knowledgeable enough to recognize when the narrator brings up an unplanned but valuable subject, and who is able to pursue that new subject with questions....Two types of people who should not be assigned to interviewing. They are the compulsive talker and the compulsive director. Both types will end up with interviews of themselves. (Willa K. Baum, *Oral History for the Local Historical Society*, 28)

##### Interviewing Tips

###### DO

- Indicate empathy when appropriate.
- Show appreciation for narrator's help.
- Listen carefully.
- Follow narrator's pacing.
- Explain the reason for change in topic.
- Probe when appropriate.
- Use follow-up questions.
- Ask a challenge question in a sensitive manner.
- Request clarification when needed.
- Begin with general questions, then move to specific ones.
- Be willing to follow unexpected paths, but don't stray too far from reasons for interview.

###### DO NOT

- Interrupt the narrator.
- Keep repeating what the narrator has just said.
- Infer something the narrator has not said.
- Fail to pick up on a topic the narrator indicates is important.
- Make irrelevant, distracting comments.
- Ignore narrator's feelings and fail to give empathic response.
- Fail to check the sound on the recorder.
- Let the narrator sidetrack the conversation on an irrelevant topic.
- Ask a leading question.
- Ask several questions at the same time.

##### Before the Interview

- Call or write the respondent well before the time you would like to conduct the interview. Explain your plans and purposes, set the time for the interview.
- Gather as much background information about the respondent as you can and familiarize yourself thoroughly with the relationship between the respondent and the project you are working on.
- Outline the main points of interest for your interview. You don't need to write out specific questions, but have some general or main points that you want to cover, but don't feel bound by your outline.
- Become thoroughly acquainted with the operation of the tape recorder, especially the microphone, volume controls, and tape-changing procedures.
- Organize what you need to take with you for the interview. recorder, tapes, notes, photographs, extra tapes, batteries, extension cord.

### To Start the Interview

- Situate yourself and the respondent in comfortable positions, keep the recorder within easy reach, but not so that the respondent will be too conscious of it. Try to avoid distractions, interruptions, and background noises from radios, television sets, traffic, or birds.
- If you can do so, begin the interview with identifying information: name the interviewer, the respondent, the date, the place, and the subject of the interview. A conversational style will provide a nice transition between the informal conversation and the interview which follows, establishing the basis for an easy flow between questions and answers.
- Be sure to check the time and to know the length of your tape so that you will not have to look constantly to see how much recording time remains.
- Unless other circumstances dictate, interviews should not be scheduled for longer than an hour or hour and a half.

### During the Interview

- Remind yourself that the interview is not intended to show off your knowledge-- though you must appear knowledgeable to the respondent--but to elicit from the respondent clear responses to your questions. Above all, do not dominate the conversation with displays of knowledge.
- Avoid asking questions that can be answered with a simple yes or no. Useful leads include: "What led up to...?" "Tell me about..." "What did you feel when...?" and "I would like to hear about..."
- Ask only one question at a time; that is avoid running questions together or protracting them so that the respondent is confused regarding which one to answer.
- Keep your questions brief and to the point.
- Start with non-controversial matters, saving more delicate ones until good rapport has been established.
- Listen.
- Don't let periods of silence fluster you; the respondent needs time to think.
- Don't worry excessively about a question that seems to be clumsily worded. A little fumbling by the interviewer may help to put the respondent at ease.
- Do not interrupt a good story simply because another question has occurred to you or because the respondent has wandered from the planned framework of questions. If you do, valuable remembrances might escape. Try to find gentle ways and the appropriate time for pulling the conversation back on track.
- To help the respondent describe persons, ask about their appearance, then about their personality, character, and activities.

- Remember that persons being interviewed are likely to give more interesting and more vigorous responses to questions or statements that imply uncertainty on your part than to ones that suggest that you are merely seeking agreement. A phrase like "I'm not sure I understand" or "this can be confusing to someone who wasn't there" may elicit useful information.
- Try to establish where the respondent was at the time of the events being described as well as his or her role in them. Determine whether the respondent was a participant or a passive witness.
- Use the interview to verify information gained from other sources. Do not take issue with accounts given by the respondent even if you believe another version to be more accurate. Be content to elicit as much information as possible, possibly offering alternative versions: "Some people say..." or "I have heard..." You can decide later which version of a story is accurate.
- Try to avoid off-the-record comments; try instead to get the respondent to speak in terms that permit the statement to be part of the record. Sensitive materials can be protected by closing the tape for an agreed-upon period of years, that is, by sealing it so that researchers will not have access to it until the material in question is less sensitive. It is better to have such material recorded and waiting for later use than to let it escape entirely.
- Do not interrupt the respondent unless the story strays too far from its course. Interruptions, when necessary, should begin with phrases like "let's go back to where you..." or "a moment ago you were telling me about..."
- Avoid turning the machine off and on unless the respondent becomes unduly agitated or uncommunicative. Having some irrelevant material on the tape is better than losing the flow of the conversation by switching the recorder off and on again.
- If there are interruptions, a telephone call, a visitor, etc., then turn off the machine and start up again when the informant is ready.
- Be alert to points in the interview when special factual information is brought out. Take note of this information by writing it down. Asking the respondent to spell names is not at all inappropriate. Accuracy is more important than an uninterrupted interview.
- Use photographs, clippings, or other documents to encourage the respondent to talk about persons or events that are of particular interest to you and about which his or her memory might need some jostling. Asking respondents to dig out photographs and other memory-prompting materials before the interview may be a way of inviting them to think about the topics you want to discuss. If possible, make copies of these documents and include them with the tape when you deposit it in the archives.
- At the end of the interview, repeat the identifying information: the interviewer, the respondent, the date, the place, and the subject of the interview.

#### After the Interview

- Secure the written permission of the respondent to use the tape and transcription (Agreement and Release Form – see examples below).

- Record the identifying information in writing on a card or Interview Information Form (see example below) to be placed in an interview file. On the same card should be a summary of the major topics discussed, along with the time in the interview when discussion begins. The time-topic index, which requires the use of a stopwatch, makes the tape useful to researchers before a typed transcript becomes available. Such an index is important even when the researcher is also the interviewer.
- Store the tape in a place where it can be preserved without damage, which means low humidity and temperature that avoids extremes of heat and cold.
- Arrange for the tapes to be transcribed.

### A Note About Technology

Collecting and distributing oral histories in the digital age requires some thought:

- Consider audience, purpose, and use: Who will use the oral histories? How will the histories be used and preserved?
- Given that technology is constantly changing, consider –
  - ✓ Expected life of the equipment
  - ✓ Sound quality needs
  - ✓ Continued access to the audio recording
- Previously, oral historians used reel-to-reel and cassette tape, now digital recording is common.
- Digital recorders: cheap handhelds v. more expensive recorders equipped with a tabletop mic.
- For using the audio to transcribe the interview, a cheaper handheld device is sufficient.
- Broadcast-quality recording equipment and external microphones for multimedia application and flexibility for possible future uses.
- Other equipment: microphones, headsets, extra batteries, etc.
- Audio or video recordings? (Video often makes interviewees uncomfortable in a way that audio does not – a consideration to be weighed against how the resource will be used).

Example of Interview Information Form – 2 pages



**Shiloh Museum of Ozark History**  
**Interview Information Form**  
 (please print)

<b>Interviewee name:</b>	
<b>Nickname:</b>	<b>Maiden name:</b>
<b>Address:</b>	
<b>Phone (home):</b>	<b>Phone (cell):</b>
<b>Email address:</b>	
<b>Interviewer name:</b>	
<b>Address:</b>	
<b>Phone (home):</b>	<b>Phone (cell):</b>
<b>Email address:</b>	
<b>Interview</b>	
<b>Date:</b>	<b>Approximate length:</b>
<b>Location:</b>	
<b>Directions to location:</b>	
<b>Comments:</b>	

<b>Interviewee Information</b>	
<b>Name:</b>	
<b>Birth date:</b>	<b>Birthplace:</b>
<b>General interview topics:</b>	
<b>Relatives mentioned (names, relationships, birth/death/marriage dates):</b>	
<b>Significant places mentioned:</b>	
<b>Significant events mentioned (dates):</b>	
<b>Photos/documents mentioned +/- or loaned:</b>	
<b>Comments:</b>	

## 5. TRANSCRIBING THE INTERVIEW

### Why Transcribe Oral Histories

The transcribed interview is much easier for researchers to use than an audio tape.

The reason for transcripts—are to record, to illuminate, to re-present, and to facilitate analysis. (Willow Roberts Powers, *Transcription Techniques for the Spoken Word*, 2.)

A corrected transcript may be more accurate and complete because the recorded works were put down in writing while the narrator was still available to clear up obscurities. Words that are hard to hear can be checked by the actual speaker; questions that were inadequately answered can be expanded by written comment.

You do have something to show for your efforts. A permanent record. A monument to a life.

Transcribing is hard, time-consuming work. Many people think it is also mechanical, neither challenging nor interesting. They are, ultimately, wrong. For those of us with an interest in human beings and language, the work of transcribing broadens our experience of speech, gives the analytical mind much more to play with than the text itself ever will, and strengthens our memory for the work that lies ahead....We talk a great deal; the opportunity to do nothing but listen is a rare treat." (Willow Roberts Powers, *Transcription Techniques for the Spoken Word*, 10.)

### Procedures for Transcription

- At the end of the interview, when you get back to the office or your home, listen to the tape and make a rough table of tape contents with time markers. Also jot down questions for subsequent interviews. You can use both a minute and counter index. This will help decide whether to transcribe the interview and its priority for transcription.
- Poke out the two tabs on the cassette so that the tape cannot be recorded over.
- Make a working copy of the original tape or a back-up of the digital file.
- As a general rule, try to transcribe all the interviews and try to transcribe them as soon after the interview is completed as possible.
- Keep a copy of the initial transcription, subsequent edited versions, and the final edited and corrected transcription.

### Styles of Transcription

Transcribing is not as straightforward as it might seem. Speaking and writing are different, and turning the spoken word into writing requires careful thought. Should you transcribe exactly what was said or a version that might be easier to read or understand? Which is more important, content or spoken form? Meaning or style? Broken sentences or intent? How should emotion appear in the written text? To what extent should characteristics of performance be included? Can we truly capture any of these things? (Willow Roberts Powers, *Transcription Techniques for the Spoken Word*, 9)

#### *Verbatim*

Did I what, uh, did I uh well, let me think uh yeah now sure, yeah sure I uh drove the uh uh the Kennebec River one no it was one spring yes.

#### *Punctuate differently*

Did I what—uh, did I—uh, well, let me think. Uh, yeah, now sure, yeah, sure—I, uh, drove the, uh, uh, the Kennebec River one—no, it was one spring, yes.

*Omit nonwords*

Did I what—did I—well, let me think, Yeah, now sure, yeah, sure—I drove the Kennebec River one—no, it was one spring, yes.

*Editing - for the ethnographer*

Did I what—well, let me think. Yeah, now sure, yeah, sure—I drove the Kennebec River one—no, it was one spring, yes.

*Editing - more radical editing for the historian*

Well, let me think. Yeah, I drove the Kennebec River one spring.

Edward Ives, *The Tape-Recorded Interview: A Manual for Field Workers in Folklore and Oral History*, 80.  
Willow Roberts Powers, *Transcription Techniques for the Spoken Word*, 65-66

Advice to the Transcriber

from (Willa K. Baum *Transcribing and Editing Oral History*, pp. 28-33)

1. Listen to about 10 minutes before starting to type in order to catch the manner of speaking, special pronunciations, crutch words, etc. Listen ahead at least a phrase before typing. If the narrator is prone to many false starts, you will have to listen ahead more. If the narrator is fairly deliberate, you can type almost as the words are spoken.
2. Type the words you hear, in the order they are spoken. Listen and type with understanding of what the speaker means, but be careful not to get rolling with the speaker so well that you are inadvertently putting words and phrases into his mouth. Even if the speaker may be awkward, forgetful, or nonverbal, resist the temptation to help out with your own superior vocabulary.
3. Punctuate according to the sense of the words as spoken. Try to use only periods, commas, and long dashes (em dashes). Avoid exclamation points, bold letters, colons and semi-colons. Do not use ellipsis points (...) as they indicate something has been left out. Follow your project's style sheet. A transcriber has to do the best he can to indicate how the words were spoken. No changing of word order is allowed.
4. Listen for the end of a sentence; even if it isn't a complete sentence, stop, and start a new sentence. Many narrators go on and on, using an "and" instead of a period. End those run-on sentences at reasonable points, but do not break down a complex clause-speaker into short sentences.
5. Paragraph when the subject changes.
6. Unusual pronunciation and fropped word endings should not be indicated by phonetic spelling. It is almost impossible to convey pronunciation phonetically, and narrators are offended by a sprinkling of "yeahs," "yups," and "goin's," throughout the transcript even if they said it that way.
7. Contractions should be typed as spoken. "I'll look that up; I'm not sure what year it was" offends no one and is more natural than "I will look that up; I am not sure what year it was."

8. Crutch words. Almost everyone speaks with a plentitude of crutch words and gurgles such as “ah,” “well,” “and then,” “of course,” “you know,” “understand?” “right?” which serve the purpose of either a pause to think of the next thing to say, or a check as to whether the other person is listening. It is unlikely a narrator will approve and release a transcript full of crutch words; even if she does they will serve to impede the reader and to make the narrator look inadequate. Leave out most crutch words in transcribing if it is apparent that they are just pauses for thought. Leave in a few to show the narrator uses them, that this is an informal conversation. Leave them in if they have meaning.
9. Interviewer’s approval words. Do not transcribe comments of the interviewer which are clearly only to indicate he is listening, such as “my, my,” “how interesting,” “really?” Like crutch words, they only serve to impede the reader and make the interviewer look like a scatterbrain.
10. Do not transcribe false starts or unfinished sentences if the interviewee clearly reconsiders, stops, and then states it otherwise. Do transcribe if it is information she does not repeat in the revised sentence. In other words, get down all the information, but if she fumbles and then starts again, leave out the fumble.
11. Portions you cannot hear. Listen again. Ask someone else in the office to listen. Don’t waste too much time trying to hear what you can’t. If you still can’t make it out, leave a blank about as long as you think the phrase is (don’t underscore) and pencil in lightly the counter number. The interviewer or editor may be able to hear it later. You can also use brackets to indicate [an inaudible word], a word or name you are not sure about or how they are spelled Bob [Siciliano?], or words you do not understand or are from a different language whose spelling and meaning you don’t know. [gemutlichkeit--German] These can be clarified for the final draft. Avoid using such words as [garbled or nonsense] that may be offensive to the interviewee.
12. Portions to be left out. The interviewer may indicate on the interview notes that certain portions are not to be typed, perhaps chit-chat, an irrelevant story, or a repetition of an already told tale. If one aims for an informal interview, it is better to leave the tape running during the interview and then not transcribe irrelevant portions than to call attention to the recorder by turning the tape on and off. Omissions may or may not be indicated, according to the interviewer’s request. For example (Interruption by take-off of an airplane, conversation about the hazards of living near an airport) may be fine, but omit (Fourth telling of how she walked ten miles to school and never missed a day.)
13. State directions, descriptions of what is happening, or how words are spoken. Use these with discretion and put them in parenthesis. Some are necessary to understand the action, such as (reading from newspaper), (goes to bookcase to get scrapbook), (interruption for telephone call), (pause while fire engines go by).
14. Others are interpretations of the sound and must be used with care lest they offend the narrator. For example, (laughter) is fine if it follows a genuine joke, but may be offensive if it is in an inappropriate place or in fact represents a nervous giggle. The transcriber can try to indicate how the words were spoken – (softly), (sadly), (whispering)—and can underline words to indicate heavy emphasis, or put in ALL CAPS words that are spoken loudly for emphasis, but keep in mind the narrator’s feelings. Some indications of emotion are best limited to the tape where they can be evaluated in their full sound context.
15. Proper names and places. Use the notes that come with the interview. The interviewer should have written down names and places, and checked the spelling with the narrator. If not in the notes, look up any names if you can in such reference works as the telephone directory, who’s who, almanac, atlas, and history books. If nowhere to be found, spell phonetically. The names that cannot be checked should be called to the attention of the narrator when she reviews the transcript.

### The Time and Cost of Transcribing.

- You can expect to spend an average of 6-12 typing hours for each hour of recording. Then it requires editing, correcting, and a final edit.
- A one-hour interview typically translates to around 20-35 pages of finished transcript.
- Pricing can be per interview hour, per transcription work hour, per word, or per page.
- Trained transcribers currently charge around \$8 per transcribed page ~ \$150 to \$200 per interview.
- Auto digital services may save time with initial transcription but are not specialized and will need to be very carefully checked.

## 6. LEGAL ISSUES & AGREEMENT FORMS

### Areas of Legal Concern for the Oral Historian

1. Copyright
2. Libel and Slander
3. Privacy

#### 1. Copyright

Copyright (John A. Neuenschwander, *Oral History and the Law*, 16-17)

- Copyright is a form of legal protection afforded a wide array of creative works. It is a system of property much like the ownership of land. The owner of a copyright may sell, lease, divide, and/or bequeath his or her interest.
- Copyright in the United States is governed exclusively by the Copyright Act of 1976.

The Legal Framework (Sommer and Quinlan, *The Oral History Manual*, p. 13.)

- The primary legal framework for oral history work rests on the established legal premise that an oral history interview creates a copyrightable document as soon as the recorder is turned off at the end of an interview session.
- Oral history memoirs are deemed analogous to written autobiographies, which authors can clearly copyright.

Oral History and Copyright (John A. Neuenschwander, *Oral History and the Law*, 18-22)

- Copyright protection begins at the moment of creation
- There is no registration requirement
- Copyright holders are not required to affix a copyright symbol, author name, and date to their works.
- Registration is required before a copyright holder can file a lawsuit for alleged infringement.
- There may be more than one author of a work (Interviewees and Interviewers)—Therefore secure assignments of copyright from both.

#### 2. Libel and Slander

Legal Terms (John A. Neuenschwander, *Oral History and the Law*, p. 5)

- Tort—A civil wrong or injury other than a breach of contract
- Defamation “a false statement of fact printed or broadcast about a person which tends to injure that person’s interest
- Libel—when the offending words are written
- Slander—when the offending words are spoken

Potential Legal Pitfalls

- Generally, words held to be defamatory relate to accusations of criminal, unethical, or immoral behavior, professional incompetence, financial irresponsibility, or association with despicable people. (Sommer and Quinlan, *The Oral History Manual*, p. 18)
- If an interviewee in a careless moment utters some words that later turn out to be defamatory...the accepted rule is that anyone who repeats, republishes, or redistributes a defamatory statement made by another can be held liable as well. (John A. Neuenschwander, *Oral History and the Law*, 6)

Legal Defenses Against Accusations of Libel and Slander (Sommer and Quinlan, *The Oral History Manual*, p. 19)

- The person about whom the defamatory statement was made is dead; only the living can be libeled.
- The person about whom the defamatory statement was made is a public figure, not a private individual.
- Truth is an absolute defense against charges of libel.

Public vs. Private Individuals (John A. Neunenschwander, *Oral History and the Law*, p.9)

- Once a person becomes a public figure in connection with the particular controversy, that person remains a public figure thereafter for purposes of later commentary or treatment of that controversy.

### 3. Privacy

Privacy (Valerie Raligh Yow, *Recording Oral History*, p. 127)

- Any recording without the speaker's knowledge and consent is an invasion of privacy.
- In oral history interviews, begin the recording by asking on tape if you have permission to record. Make sure you have the spoken consent on tape.

Restrictions (Willa Baum, *Transcribing and Editing Oral History*, p. 75)

- If the narrator or the oral history program wants restrictions, then they should be worked out so as to include only the sensitive material, and so as to be easy to administer. It would be a waste to close an entire interview for twenty years just because it includes five minutes of comments that might hurt someone's feelings. Close the sensitive transcript pages, erase those passages from the patron-use tape and close the archival master tape, but leave the rest of the interview open to research.

Closing Portions of Interviews (Willa Baum, *Transcribing and Editing Oral History*, p. 75)

- The sensitive passages should be closed for a specified number of years, usually until the date when it may reasonably be expected all the participants will be deceased.

Restriction Language

- The entire tape and transcript shall be closed to all users until (date)
- The following transcript pages and the tape relating thereto shall be closed to all users until (date) except with the express permission of (interviewee). Transcript pages \_\_\_\_\_.

### Legal Agreements

Inasmuch as the whole purpose of an oral history program is to make the information that is captured in the interviews available to many users (not just to the interviewer), it is important that this availability be insured by having the narrator sign a release to the information, and to do that as soon after the recording of the interview as possible. (Willa Baum, *Transcribing and Editing Oral History*, p. 73)

Reasons for the Legal Agreement—Release Form (Valerie Raleigh Yow, *Recording Oral History*, p. 122)

- If you want to use the information in published writings or in public presentations, you must secure from the narrator the right to use the information.
- If the taped interview is to be deposited in archives, the archivist will need permission to let the public listen to it.

Obtaining Copyright Gives an Organization Five Exclusive Rights (DeBlasio, et. al, *Catching Stories*, p. 69)

1. To reproduce the interview, i.e., to make copies
2. To make derivative works, including the transcript, print or Web-based articles, and audio and video programs
3. To distribute copies by sale, rental, lease, and lending

4. To perform the work publicly (including digital audio Web streaming for sound recordings)
5. To display the work publicly

#### Interviewers

- Have every part-time, independent contractor, and volunteer sign an Assignment of Copyright Agreement before they begin interviewing.
- Have interviewers sign release form—along with interviewees for each interview.

#### Interviewees

- Before the Interview—explain to the interviewee that you will ask him/her to sign a release form at the end of the interview
- When the interview is complete, give the release form to the interviewee to sign
- Explain that the release form allows you to
  - ✓ Use the information in a book or article
  - ✓ People who come to the library interested in the interview will be able to listen to it.
  - ✓ That the interview might be placed on an appropriate web site available to the public

#### No Signed Release

- If written documentation such as consent and release forms does not exist, then the institution should make a good faith effort to contact interviewees regarding their intent. (Oral History Association, *Best Practices for Oral History* (Post Interview item 7)
- Without a release form, you are allowed by the 1976 copyright law to use the tape in your classroom for educational purposes. You may not lend the tape to anyone else. You may, however, deposit a copy of the tape and/or transcript in the archives if you seal it for a period of seventy years after the narrator's death. (Valerie Raleigh Yow, *Recording Oral History*, p. 124)

#### Anonymity

- Anonymity is especially problematic for the historian....One of the necessities in reviewing a historian's conclusions is that others have access to the same documents. If the source is anonymous and identified only by a pseudonym, how can the veracity of a statement be judged? The narrator is unknown and therefore does not take responsibility for his or her statements.... In biographies and narratives of events and movements, you slide away from credibility when narrators do not identify themselves and take responsibility for their words. (Valerie Raleigh Yow, *Recording Oral History*, p. 134)

#### Institutional Review Boards (IRBs) (Valerie Raleigh Yow, *Recording Oral History*, p. 129)

- Their mission is to protect human subjects who are going to be studied.
- An important aim of the oral historian's research is to make known an individual's actions in history and also to hold the individual accountable for his testimony
- In 2003, the Office for Human Research Protection accepted a policy statement by representatives of the American Historical Association and the Oral History Association that oral historians' research methods do not fit the type of research covered by federal regulations.

#### Good Advice (John A. Neuenschwander, *Oral History and the Law*, 35)

1. Anticipate potential legal problems and take appropriate preventative measures
2. Avoid oral promises and understandings. Get it in writing
3. Make sure that your legal-release forms fit your program
4. Alert your staff to all potential areas of liability
5. Remember, preventative law is always less expensive and time-consuming than litigation.
6. Get local legal advice if necessary

Examples of Agreement and Release Forms

The legal agreement should be as short and simple as possible. It should open the interview tape and transcript to research, educational uses, and to quotation and publication in part or in full. The ownership and administration of the interview should be turned over to an institution that will be around to administer it in perpetuity. (Willa Baum, Transcribing and Editing Oral History, p. 74)

		
<b>UTAH HUMANITIES</b> <small>Ideas in Action</small>		<b>Utah Division of State History</b>
<b>UTAH HUMANITIES UTAH DIVISION OF STATE HISTORY ORAL HISTORY PROGRAM</b>		
<b>INTERVIEW AGREEMENT AND DEED OF GIFT</b>		
<p>I hereby give to the Utah Division of State History (UDSH) and Utah Humanities (UH) the recordings and transcriptions of the interview/interviews recorded on _____ and grant the UDSH/UH the right to make the recordings and transcriptions available to the public for such educational and research purposes that are in accordance with the policies and procedures of the Society's Utah History Information Center or Utah Humanities' policies, including (but not limited to) posting on a dedicated oral history website.</p>		
NARRATOR	_____	
ADDRESS	_____	
	_____	
SIGNATURE	_____	
DATE	_____	
INTERVIEWER	_____	
ADDRESS	_____	
	_____	
SIGNATURE	_____	
DATE	_____	

ORAL HISTORY RELEASE FORM

The \_\_\_\_\_ oral history project is a program of the \_\_\_\_\_ [organization name]. Recordings and transcripts resulting from interviews conducted for the project will be deposited in the oral history collection of \_\_\_\_\_ [organization name], where they will be made available for historical research and public dissemination. Participation in the project is entirely voluntary.

I, the undersigned, have read the above and voluntarily donate to the project full use of the information contained in the recordings made on \_\_\_\_\_ (date/s), transcripts of the recordings, and other materials collected during the interview.

I hereby assign legal title and all literary property rights, including copyright, in these recordings and transcripts to the project, which may copyright and publish said materials. The information may be used for scholarly or educational purposes as determined by the project (except as noted below).

Restrictions on use: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Interviewee's signature \_\_\_\_\_ Date \_\_\_\_\_ Interviewer's signature \_\_\_\_\_ Date \_\_\_\_\_

Interviewee's name (please print clearly) \_\_\_\_\_ Interviewer's name (please print clearly) \_\_\_\_\_

Interviewee's address: \_\_\_\_\_ Interviewer's address: \_\_\_\_\_

Street \_\_\_\_\_ Street \_\_\_\_\_

City \_\_\_\_\_ City \_\_\_\_\_

State and Zip Code \_\_\_\_\_ State and Zip Code \_\_\_\_\_

If interviewee is minor, signature of parent or guardian: \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



118 W. Johnson Ave.  
Springdale, AR 72764-4313  
(479) 750-8165; fax (479) 750-8693  
[shiloh@springdalear.gov](mailto:shiloh@springdalear.gov)  
[www.springdalear.gov/shiloh](http://www.springdalear.gov/shiloh)

### Oral History Release Form

In consideration of the recording and preservation of this oral history by the Shiloh Museum of Ozark History, **I the narrator**, \_\_\_\_\_, and **I the interviewer**, \_\_\_\_\_, hereby transfer to the Museum the rights, including all literary, copyright, and property rights unless restricted as noted below, to publish, duplicate, or otherwise use the recording(s) and transcribed interview(s) recorded on \_\_\_\_\_, and any photographs and/or videotaped footage taken during the interview. This includes publication rights in print and electronic form such as on the Internet, the right to rebroadcast the interview or portions thereof, and permission to transfer the interview to future media.

Likewise, **I the director** of the Shiloh Museum hereby agree to preserve the products of this oral history interview according to accepted professional standards and agree to provide the narrator and interviewer with access to the taped interview(s).

Note any restrictions:

Dated \_\_\_\_\_ **Signature of Narrator** \_\_\_\_\_

Narrator's name as s/he wishes it to be used \_\_\_\_\_

Narrator's address \_\_\_\_\_  
(street or P.O. box) (city) (state) (zip code)

Narrator's phone number (\_\_\_\_) \_\_\_\_\_ Narrator's email address \_\_\_\_\_

Dated \_\_\_\_\_ **Signature of Interviewer** \_\_\_\_\_

Interviewer's address \_\_\_\_\_  
(street or P.O. box) (city) (state) (zip code)

Interviewer's phone number (\_\_\_\_) \_\_\_\_\_ Interviewer's email address \_\_\_\_\_

Dated \_\_\_\_\_ **Signature of Director** \_\_\_\_\_  
Director, Shiloh Museum of Ozark History

ORAL HISTORY OF UTAH PEACE ACTIVISTS

INTERVIEWER AGREEMENT

I, Kathy French, knowingly and voluntarily permit the Utah Valley State College Archives in Orem, Utah the full use of the tape and resulting transcript of my interview with Mark Nelson

Kathryn French  
Interviewer (Signature)

7/30/06  
Date

ORAL HISTORY OF UTAH PEACE ACTIVISTS

INTERVIEWEE AGREEMENT

The Utah Valley State College Archives in Orem, Utah appreciates your willingness to be interviewed as part of its oral history program. The purpose of the program is to gather and preserve information for historical and scholarly use.

The interviewer made a tape recording of the oral history. A verbatim typescript of the tape may be made and edited. The transcript will then be returned for editing. The completed transcript and the tape may then be filed in the Utah Valley State College Archives. These materials will be used for research and writing unless restricted. In return, you will be given a copy of the transcript.

I, Mark Nelson, have read the release form, and in view of the historical  
Interviewee name, please print  
And scholarly value of this interview, I knowingly and voluntarily permit the Utah Valley State College Archives, Orem, Utah, the full use of the tape and resulting transcript.

Mark Nelson  
Interviewee (Signature)

7/30/2006  
Date

Kathryn French  
Interviewer (Signature) for the UVSC Archives

## 7. BIBLIOGRAPHY

### A. Books on Doing Oral History

Baum, Willa K. *Oral History for the Local Historical Society*, (American Association for State and Local History, Nashville, 1987 (third edition).

Baum, Willa K. *Transcribing and Editing Oral History*, (American Association for State and Local History, Nashville, 1991.

DeBlasio, Donna M., Ganzert, Charles F., Mould, David H., Paschen, Stephen H., Sacks, Howard L., *Catching Stories: A Practical Guide To Oral History* (Athens, Ohio: Swallow Press, 2009).

Dunaway, David K. and Willa K. Baum, *Oral History: An Interdisciplinary Anthology*, AltaMira Press, Walnut Creek, California 1996 (second edition).

Lanman, Barry A. and Laura M. Wendling, *Preparing the Next Generation of Oral Historians: An Anthology of Oral History Education*, (AltaMira Press, Walnut Creek, California, 2006)

Neuenschwander, John A., *Oral History and the Law*, (Oral History Association Pamphlet Series no. 1)

Powers, Willow Roberts, *Transcription Techniques for the Spoken Word*, (AltaMira Press: Walnut Creek, California, 2005.)

Ritchie, Donald A. *Doing Oral History*, (Twayne Publishers, New York, 1995.)

Barbara W. Sommer and Mary Kay Quinlan, *The Oral History Manual*, (AltaMira Press, Walnut Creek, California, 2002.)

Glenn Whitman, *Dialogue with the Past: Engaging Students and Meeting Standards through Oral History*, (AltaMira Press: Walnut Creek, California, 2004.)

Yow, Valerie Raleigh, *Recording Oral History: A Practical Guide for Social Scientists*, (Sage Publications, Thousand Oaks, California, 1994.)

*The Oral History Review*, journal of the Oral History Association.

### B. Utah history books that are based on oral history

Kelen, Leslie G. and Eileen Hallet Stone, *Missing Stories: An Oral History of Ethnic and Minority Groups in Utah*, University of Utah Press, Salt Lake City, 1996.

McPherson, Robert S., ed., *The Journey of Navajo Oshley: An Autobiography and Life History*, (Utah State University Press, Logan, 2000.

McPherson, Robert S., *Navajo Land, Navajo Culture: The Utah Experience in the Twentieth Century*, University of Oklahoma Press, Norman, 2001.

Moon, Samuel, *Tall Sheep: Harry Goulding: Monument Valley Trader*, University of Oklahoma Press, Norman, 1992.

Powell, Allan Kent, *Utah Remembers World War II*, Utah State University Press, 1991.

Stone, Eileen Hallet, *A Homeland in the West: Utah Jews Remember*, University of Utah Press, Salt Lake City, 2001.

### C. Other Useful Resources

Oral History Association – [oralhistory.org/](http://oralhistory.org/)

See especially oral history principles and best practices at [oralhistory.org/about/principles-and-practices/](http://oralhistory.org/about/principles-and-practices/)

Library of Congress Veteran's History Project – [loc.gov/vets/vets-portal.html](http://loc.gov/vets/vets-portal.html)

Portal to websites from around the country that have oral history recordings with veterans, with sample questions and forms at [loc.gov/vets/kitmenu.html](http://loc.gov/vets/kitmenu.html)

Storycorps NPR – [npr.org/series/4516989/storycorps](http://npr.org/series/4516989/storycorps)

## 8. ORAL HISTORY ASSOCIATION GUIDELINES: GENERAL PRINCIPLES AND BEST PRACTICES FOR ORAL HISTORY

<http://www.oralhistory.org/about/principles-and-practices/>

Principles and Best Practices

### **Principles for Oral History and Best Practices for Oral History**

Adopted October, 2009

The **Principles and Best Practices for Oral History** update and replace the [Oral History Evaluation Guidelines](#) adopted in 1989, revised in 2000.

### **Introduction**

Oral history refers both to a method of recording and preserving oral testimony and to the product of that process. It begins with an audio or video recording of a first person account made by an interviewer with an interviewee (also referred to as narrator), both of whom have the conscious intention of creating a permanent record to contribute to an understanding of the past. A verbal document, the oral history, results from this process and is preserved and made available in different forms to other users, researchers, and the public. A critical approach to the oral testimony and interpretations are necessary in the use of oral history.

The Oral History Association encourages individuals and institutions involved with the creation and preservation of oral histories to uphold certain principles, professional and technical standards, and obligations. These include commitments to the narrators, to standards of scholarship for history and related disciplines, and to the preservation of the interviews and related materials for current and future users.

Recognizing that clear and concise guide can be useful to all practitioners of oral history, the Oral History Association has since 1968 published a series of statements aimed at outlining a set of principles and obligations for all those who use this methodology. A history of these earlier statements, and a record of the individuals involved in producing them, is [available to download](#).

Building on those earlier documents, but representing changes in an evolving field, the OHA now offers General Principles for Oral History and Best Practices for Oral History as summaries of the organization's most important principles and best practices for the pre-interview preparation, the conduct of the interview, and the preservation and use of oral histories. These documents are not intended to be an inclusive primer on oral history; for that there are numerous manuals, guidebooks, and theoretical discussions. For the readers' convenience, a bibliography of resources is provided online at the Oral History Association website.

### **General Principles for Oral History**

Oral history is distinguished from other forms of interviews by its content and extent. Oral history interviews seek an in-depth account of personal experience and reflections, with sufficient time allowed for the narrators to give their story the fullness they desire. The content of oral history interviews is grounded in reflections on the past as opposed to commentary on purely contemporary events.

Oral historians inform narrators about the nature and purpose of oral history interviewing in general and of their interview specifically. Oral historians insure that narrators voluntarily give their consent to be interviewed and understand that they can withdraw from the interview or refuse to answer a question at any time.

Narrators may give this consent by signing a consent form or by recording an oral statement of consent prior to the interview. All interviews are conducted in accord with the stated aims and within the parameters of the consent.

Interviewees hold the copyright to their interviews until and unless they transfer those rights to an individual or institution. This is done by the interviewee signing a release form or in exceptional circumstances recording an oral statement to the same effect. Interviewers must insure that narrators understand the extent of their rights to the interview and the request that those rights be yielded to a repository or other party, as well as their right to put restrictions on the use of the material. All use and dissemination of the interview content must follow any restrictions the narrator places upon it.

Oral historians respect the narrators as well as the integrity of the research. Interviewers are obliged to ask historically significant questions, reflecting careful preparation for the interview and understanding of the issues to be addressed. Interviewers must also respect the narrators' equal authority in the interviews and honor their right to respond to questions in their own style and language. In the use of interviews, oral historians strive for intellectual honesty and the best application of the skills of their discipline, while avoiding stereotypes, misrepresentations, or manipulations of the narrators' words.

Because of the importance of context and identity in shaping the content of an oral history narrative, it is the practice in oral history for narrators to be identified by name. There may be some exceptional circumstances when anonymity is appropriate, and this should be negotiated in advance with the narrator as part of the informed consent process.

Oral history interviews are historical documents that are preserved and made accessible to future researchers and members of the public. This preservation and access may take a variety of forms, reflecting changes in technology. But, in choosing a repository or form, oral historians consider how best to preserve the original recording and any transcripts made of it and to protect the accessibility and usability of the interview. The plan for preservation and access, including any possible dissemination through the web or other media, is stated in the informed consent process and on release forms.

In keeping with the goal of long term preservation and access, oral historians should use the best recording equipment available within the limits of their financial resources.

Interviewers must take care to avoid making promises that cannot be met, such as guarantees of control over interpretation and presentation of the interviews beyond the scope of restrictions stated in informed consent/release forms, suggestions of material benefit outside the control of the interviewer, or assurances of an open ended relationship between the narrator and oral historian.

## **Best Practices for Oral History**

### Pre-Interview

1. Whether conducting their own research or developing an institutional project, first time interviewers and others involved in oral history projects should seek training to prepare themselves for all stages of the oral history process.
2. In the early stages of preparation, interviewers should make contact with an appropriate repository that has the capacity to preserve the oral histories and make them accessible to the public.
3. Oral historians or others responsible for planning the oral history project should choose potential narrators based on the relevance of their experiences to the subject at hand.

4. To prepare to ask informed questions, interviewers should conduct background research on the person, topic, and larger context in both primary and secondary sources
5. When ready to contact a possible narrator, oral historians should send via regular mail or email an introductory letter outlining the general focus and purpose of the interview, and then follow-up with either a phone call or a return email. In projects involving groups in which literacy is not the norm, or when other conditions make it appropriate, participation may be solicited via face to face meetings.
6. After securing the narrator's agreement to be interviewed, the interviewer should schedule a non-recorded meeting. This pre-interview session will allow an exchange of information between interviewer and narrator on possible questions/topics, reasons for conducting the interview, the process that will be involved, and the need for informed consent and legal release forms. During pre-interview discussion the interviewer should make sure that the narrator understands:
  - oral history's purposes and procedures in general and of the proposed interview's aims and anticipated uses.
  - his or her rights to the interviews including editing, access restrictions, copyrights, prior use, royalties, and the expected disposition and dissemination of all forms of the record, including the potential distribution electronically or on-line.
  - that his or her recording(s) will remain confidential until he or she has given permission via a signed legal release.
7. Oral historians should use the best digital recording equipment within their means to reproduce the narrator's voice accurately and, if appropriate, other sounds as well as visual images. Before the interview, interviewers should become familiar with the equipment and be knowledgeable about its function.
8. Interviewers should prepare an outline of interview topics and questions to use as a guide to the recorded dialogue.

### Interview

1. Unless part of the oral history process includes gathering soundscapes, historically significant sound events, or ambient noise, the interview should be conducted in a quiet room with minimal background noises and possible distractions.
2. The interviewer should record a "lead" at the beginning of each session to help focus his or her and the narrator's thoughts to each session's goals. The "lead" should consist of, at least, the names of narrator and interviewer, day and year of session, interview's location, and proposed subject of the recording.
3. Both parties should agree to the approximate length of the interview in advance. The interviewer is responsible for assessing whether the narrator is becoming tired and at that point should ask if the latter wishes to continue. Although most interviews last about two hours, if the narrator wishes to continue those wishes should be honored, if possible.
4. Along with asking creative and probing questions and listening to the answers to ask better follow-up questions, the interviewer should keep the following items in mind:
  - interviews should be conducted in accord with any prior agreements made with narrator, which should be documented for the record.
  - interviewers should work to achieve a balance between the objectives of the project and the perspectives of the interviewees. Interviewers should fully explore all appropriate areas of inquiry with interviewees and not be 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.

- 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 anonymity. Interviewers should clearly explain these options to all interviewees.
- interviewers should attempt to extend the inquiry beyond the specific focus of the project to create as complete a record as possible for the benefit of others.
- in recognition of the importance of oral history to an understanding of the past and of the cost and effort involved, interviewers and interviewees should mutually strive to record candid information of lasting value.

5. The interviewer should secure a release form, by which the narrator transfers his or her rights to the interview to the repository or designated body, signed after each recording session or at the end of the last interview with the narrator.

### Post Interview

1. Interviewers, sponsoring institutions, and institutions charged with the preservation of oral history interviews should understand that appropriate care and storage of original recordings begins immediately after their creation.

2. Interviewers should document their preparation and methods, including the circumstances of the interviews and provide that information to whatever repository will be preserving and providing access to the interview.

3. Information deemed relevant for the interpretation of the oral history by future users, such as photographs, documents, or other records should be collected, and archivists should make clear to users the availability and connection of these materials to the recorded interview.

4. The recordings of the interviews should be stored, processed, refreshed and accessed according to established archival standards designated for the media format used. Whenever possible, all efforts should be made to preserve electronic files in formats that are cross platform and nonproprietary. Finally, the obsolescence of all media formats should be assumed and planned for.

5. In order to augment the accessibility of the interview, repositories should make transcriptions, indexes, time tags, detailed descriptions or other written guides to the contents.

6. Institutions charged with the preservation and access of oral history interviews should honor the stipulations of prior agreements made with the interviewers or sponsoring institutions including restrictions on access and methods of distribution.

7. The repository should comply to the extent to which it is aware with the letter and spirit of the interviewee's agreement with the interviewer and sponsoring institution. If written documentation such as consent and release forms does not exist then the institution should make a good faith effort to contact interviewees regarding their intent. When media become available that did not exist at the time of the interview, those working with oral history should carefully assess the applicability of the release to the new formats and proceed—or not—accordingly.

8. All those who use oral history interviews should strive for intellectual honesty and the best application of the skills of their discipline. They should avoid stereotypes, misrepresentations, and manipulations of the narrator's words. This includes foremost striving to retain the integrity of the narrator's perspective, recognizing the subjectivity of the interview, and interpreting and contextualizing the narrative according to the professional standards of the applicable scholarly disciplines. Finally, if a project deals with community history, the interviewer should be sensitive to the community, taking care not to reinforce thoughtless stereotypes. Interviewers should strive to make the interviews accessible to the community and where appropriate to include representatives of the community in public programs or presentations of the oral history material.