

ORAL HISTORY GUIDELINES

Recorders

You can use audio recorders or video recorders of many types—tape recorders, DSLR cameras, smartphones, and other technologies—to record oral history interviews. As new technology is developed, there are more and more recording devices available. Whatever device you use, be sure to familiarize yourself with it thoroughly before recording in the field.

Also, if using older technologies, you might consider how accessible and easy it is to find and maintain the equipment. Older technologies include MiniDisc recorders, VHS, Hi8 and Mini-DV video cameras, and tape recorders.

No matter the technology, use an external microphone, clipped to the interview subject's lapel or placed nearby to ensure high quality audio. The audio quality of an oral history interview is the most crucial component—if no one can hear or understand the person's voice, the oral history loses its value.

SmartPhone

Handheld cellphones with a good quality camera are a great way to capture video without the need for additional expensive equipment. However, there are a few important things to address if using a phone. Like for other technologies, use a plug-in microphone in order to capture clean audio. Also, make sure you have enough storage space on the phone or a capture card to record the full interview. Audio/video takes up much more space on a phone's internal storage than still photos, so be sure you have plenty of space available. Don't rely on cloud-based storage unless you are 100% certain you'll have strong internet signal. For a good quality image without distracting movement, use a small tabletop tripod to stabilize the camera.

Tape Recorder

If using a tape recorder, interviewers should be careful to avoid voice-activated recorders because they often cut off the first part of spoken words. Sixty or ninety minute tapes are best, and – if possible – recorders should be set to the Type II (chromium oxide) tape setting. The sound quality on tape deteriorates over time. If a tape recorder is used, it is best to dub the interview to a digital format for preservation. Interviewers should use an electrical outlet, or if no outlet is available and batteries must be used, interviewers should always have a spare set of batteries for equipment. Also, it is best to use an external microphone, if one is available. Keep in mind that you might need an extension cord.

MiniDisc Recorder

A MiniDisc recorder doesn't have an "on/off" button; it turns on when any button is pushed. To be sure you are not recording over any previous tracks when starting another

session, power-up the MiniDisc recorder by pushing the "End Search" button. Interviews, when possible, should be conducted in places where an electrical outlet is available. If no outlet is available and batteries must be used, interviewers should always have a spare set of batteries for equipment. When recording with a MiniDisc, you must use an external microphone.

Video Camera

Recording an oral history with a video camera adds additional challenges, such as lighting and added equipment. Use a tripod for the camera while you ask questions. Sit just to one side of the camera, and ask the narrator to face you rather than the camera. (Or conduct interviews as a team; one person operates the camera while another person conducts the interview.) Using an electrical outlet for digital video recorders can sometimes cause a “hum” in the audio recorded, so using a fully-charged battery is recommended. Always check batteries before the interview, and have fully-charged backup batteries available.

Always double, triple check to make sure you have all of the necessary equipment, including extra batteries and storage media.

Interviews and Procedures

Multiple interviews

Allow for at least two (preferably three) interviews with each narrator.

1. Preliminary interview: Use this interview to get acquainted with your narrator and to put them at ease with you, the interview procedure, and the recorder. Some oral historians recommend using this preliminary interview to record a brief life history of the subject (suggested topics: place and date of birth, family history – parents and siblings, marriage, children – work, retirement, etc.). Ask easy-to-answer factual questions, as they are nonthreatening and usually put the subject at ease.
2. Main interview: Use the main interview to ask your most important questions and cover basic topics.
3. Follow-up interview: Before the follow-up interview, take time to review the recordings of your earlier interviews. Use this final interview to clarify facts from the first interviews, follow new lines of questioning arising from the first interviews, and go over any responses that may not have been clear on the earlier recordings.

If interviewing on video for possible broadcast, keep in mind that multiple interviews of the same person can be confusing to the viewer, due to different settings, different clothing, etc. This is not an issue if one interview is a formal “talking head” and another is a candid interview, such as the person showing you around their home or participating in a group event.

Single interview

Sometimes multiple interviews are not possible. If this is the case, be as prepared as possible at the one interview opportunity you do have. Take a few minutes to help the interview subject feel relaxed and get acquainted with you.

- **Time and place of interviews:** Interviews should take place at the narrator's convenience, at a time and place where the narrator is comfortable. Often, the subject's home or work environment is the most comfortable place. Keep in mind that the ideal setting is a quiet space, free of interruptions, so you might need to clarify that with the subject when setting up the interview location. (For example, if you have the choice between the subject's work, which is a cubicle space in a busy office, or the subject's home, where he/she lives alone in a quiet neighborhood, it would be best to record the interview at the subject's home.)
- **Interview audiences:** Remember that the interview is not just two people having a chat. The interviewer is present to gather information, and the recording device represents an interested –but silent– third party.
 - Be sure to ask basic questions, and have the subject provide all relevant answers. (For example, the interviewer should say, "Please state your name," not "Your name is John Smith, right?").
 - Although the interviewer may know certain information about a subject, you should assume that an audience will not.
 - Use your knowledge to craft questions; don't neglect to ask questions because you already know the answer.
 - Try to guide a subject away from answering in a manner that assumes your knowledge of his/her life. (For example, if the person you are interviewing is a friend, before starting the interview, politely remind them to answer questions as if you don't know anything about them.)
- **Record keeping:** Establish a record system for your interviews. Each recorded interview should be labeled with the date, the subject's name, the interviewer's name, and the length of the interview. Keep a Sharpie pen on hand to label tapes/discs on site as interviews are conducted (do not wait to label recordings later). In addition, keep a separate record log in a central office/location with all of the interview information for the project. If your interview is originally recorded on digital media, be sure to thoroughly label files and store them in a secure manner as soon as possible.

Preparing for the interview

Initial contact

- After choosing your topic and subject, send an initial contact letter or email inviting the subject to be interviewed. Be sure to mention the nature of your project, the topics that interest you, and the fact that the interview will be recorded for playback and preservation.
- **Follow up** soon after with a phone call to set a specific date, time, and place for the interview. *Clarify whether the interview will be audio-only or video.* Some people assume an interview will be audio-only, and they are surprised and flustered when the interviewer shows up with camera equipment.

Background research

Gather background information about your subject or topic of interest.

- Use the facts to compile a list of topics you want to cover in your interview, and prepare written questions. Many interviewers find it useful to prepare index cards with quick reference questions. It is usually best to prepare one card per topic, with several questions on each card.
- The questions are not meant to serve as a list to read from; use these questions as guides for your interview, and refer to them periodically to make sure that you've covered all the issues that interest you before moving to the next topic.

Before leaving for the interview

Review your equipment checklist.

- It is helpful to record an interview introduction before leaving home, a brief explanation of your task: "Today is January 1, 2005, and I am on my way to interview civil rights activist Sally Brown about her work in the Student Nonviolent Coordinating Committee. This is Julie Jones and this is tape number one."
- Play back the recording to make sure that all equipment is functioning properly before leaving home to conduct the interview.
- Be sure you have any written releases that you need the subject to sign.

Interviewing

Being a good interviewer is a skill developed by following guidelines and PRACTICE. There are several things to remember, so familiarize yourself with these issues before arriving at the interview.

Noise

Be aware of background noise (TV, radio, fan, air conditioner, traffic, refrigerator hum, dishwasher, washer/dryer, dogs, people, etc.) and eliminate it if possible.

- Test the recorder for a few seconds ("Testing 1,2,3") to see if background noise will be a problem.
- It might be helpful to unplug a noisy appliance or turn off the phone ringer; *remember to be polite and respectful when changing anything in the subject's home or work setting, and after the interview be sure to put everything back as you found it.*

Audio quality

Make sure the microphone is close enough to the interview subject to capture the audio. Always wear headphones when recording. If something sounds wrong through the headphones, usually something is wrong with the audio. However, *do not assume if you can hear the audio through the headphones that the recorder is picking it up*; check the audio monitor (usually bars that go up and down as the recorder picks up sound) to be sure that the audio is actually recording. If there is no audio monitor, do a test recording and play it back (see below).

Releases

Ask the subject to sign an interview release form, and make sure that he/she understands what it means.

Opening statement

Begin the interview on a fresh tape/disc/storage card with an opening statement that declares date, names of interviewer and subject, place, and purpose of interview.

With the tape running:

- Inform the narrator that the recording will be preserved
- Confirm that people will be able to listen to the recording (or read a transcript of the interview)
- Get verbal permission to record the interview (“Do you understand that your interview is being recorded?”)
- Use all this information to test the recorder. This preliminary work provides a transition to the interview without making a big deal out of it.

Conducting the interview

Conducting an interview means being a very good listener.

- Listen closely, look the narrator in the eye, and don’t let your attention wander.
- Do not voice verbal agreement (“uh-huh”) because that will be picked up in the audio recording. Instead, nod your head in silent agreement to signal that you are listening.
- Keep a notebook handy to record follow-up questions while the narrator is speaking; do not interrupt speakers.
- Avoid checking your watch for the time, but do check the recorder every few minutes to be sure that it is still running properly.
- Remember that silent spots in interviews are not bad. Do not feel compelled to fill the silent air with idle conversation. Silence often indicates that the subject is thoughtfully considering his/her response. Some of the most important, poignant stories or thoughts come after a lengthy silence.

After the Interview

There are a few things to do immediately after you turn off the recorder, and there are still more to do once you’ve left the interview setting.

- Thank the subject for his/her time.
- If you’ve rearranged furniture or disconnected power to appliances, be sure to return the room to its original state.
- Thoroughly label the recording before packing up equipment. Always write-protect your storage media (cards, tapes, discs, etc.) after you finish an interview.
- If using audio cassettes, remove the plastic tabs to avoid accidental erasures.
- When you get home, write down your impressions of the interview. Include any information that might help a listener understand the interview better (descriptions of place, clothing, etc.).
- If using physical media such as audio cassettes or mini-DV tapes, make a duplicate copy of the interview, and clearly label the second copy **DUPLICATE**.
- Back up digital files and store in a separate location to ensure a computer crash or media card failure doesn’t destroy your only copy. Using a cloud storage service provides yet another layer of insurance.

Short Guide to Oral History Interviews

The information below is meant to be a short-reference “how to” guide to interviews and oral history projects. Please add to our suggestions as needed, but be sure to meet these minimum requirements.

Prior to the Interview

1. Contact the interviewee and set date/time/place for the interview.
2. Call back to confirm the interview 48 hours in advance.
3. Prepare questions and familiarize yourself with them before you begin the interview.
4. Gather all equipment, including (but not limited to) the recorder and microphone, any required storage media, extra batteries, a power cord, the list of questions, and a notebook and pen. Be sure to test your equipment before leaving.

Beginning the Interview

1. Find a place where your subject is comfortable, and background noise (cars, fans, etc.) is minimized.
2. Make your subject comfortable by introducing yourself, explaining your equipment, and asking if they have questions regarding the interview.
3. Ask the subject to sign an interview release form, and make sure that they understand what it means.
4. Test your equipment – play back the recording to make sure it recorded your voice.
5. Begin the recording: identify yourself, date and time, location, subject’s name, and interview topic (Ex: This is Julie Jones and today is Friday, September 2, 2005, at 4 p.m. We’re in Oxford, Mississippi, at the home of civil rights activist Sally Brown. We’re here today to speak with Mrs. Brown about her work with the Student Nonviolent Coordinating Committee.)
7. Verify, on tape, that the subject knows s/he is being recorded and that people will be able to listen to the recording and read a transcript of the interview. (Ex: Ms. Brown, do you understand that this interview is being recorded? Have you just signed a release form giving us permission to use this interview?)
8. Have the subject state his/her name and address, on tape, for the record (spelling any necessary words).
9. Begin the interview.

Interviewing

1. Look the narrator in the eye.
2. Do not voice verbal agreement (“uh-huh”) – nod your head in silent agreement.
3. Be careful not to ruffle papers, squeak your chair, or make other noise audible to the recording.
4. Keep a notebook handy to record follow up questions while the narrator is speaking. Do not interrupt the speaker.
5. Do not check your watch for the time, but periodically check the recorder to make sure that it is working properly.
6. Conclude the interview on tape. (Ex: This concludes our interview with Ms. Brown. Ms. Brown, thank you for your time.)

After the Interview (on site)

1. Thank the subject for his/her time.
2. Label the recording before packing up your equipment.
3. If you rearranged the room or unplugged anything, restore the room to its original condition.

After the Interview (off site)

1. Write down your impressions of the interview (a short, one page reflection will do). Include any information that might help a listener understand the interview better (descriptions of place, clothing, etc.).
2. Make a list of key words from the interview that might be helpful to an audience using a research guide (i.e. Freedom Rides; Jackson, MS; civil rights movement; Student Nonviolent Coordinating Committee)
3. If required for your project, make duplicate copies of the interview, clearly labeling these copies DUPLICATE.
4. If required for your project, transcribe the interview two ways:
 - Listen to the recording to document questions and the time location where each is asked (Ex: Background, 1:16)
 - Type the full interview.

Adapted from the Southern Foodways Alliance (SFA) guide to oral history interviews and the William Winter Institute for Racial Reconciliation guide to oral history interviews

INTERVIEWING QUICK REFERENCE

DO

- Put the narrator at ease: Try to seem at ease yourself.
- Begin with conversation: introduce yourself, talk about the project, etc.
- Begin by asking easy, factual questions (name, place of birth, etc.).
- Maintain eye contact with the narrator
- Nod and smile in agreement
- Show appreciation for the narrator's help
- Listen carefully
- Ask the speaker to recount stories, and strive to learn specific information
- If a statement is unclear, ask for clarification after the narrator has finished speaking
- Try to slow down a narrator who talks too fast, gently and tactfully
- Explain reasons for changes in topic (transition to a new topic thoughtfully)
- Ask probing questions when sensing that the narrator is hesitant to talk
- Ask follow-up questions when necessary
- Try to have the narrator talk in specifics, rather than generalities
- Honor pauses and silence, and give the narrator an opportunity to continue
- Discreetly check several times during the interview to make sure the recorder is running

DO NOT

- Ask "yes/no" questions, as they limit responses
- Ask leading questions (Did that make you mad?). Instead, ask open-ended questions (How did that make you feel?).
- Ask more than one question at a time
- Hurry the narrator
- Repeat or summarize what the narrator has just said
- Interrupt the narrator
- Complete the narrator's thoughts/sentences
- Summarize or restate the narrator's statements after they have finished speaking.
- Talk over the narrator's voice
- Make distracting noises with rattling papers, shifting chairs, etc.
- Talk at length about yourself or your own experiences
- Make irrelevant or distracting comments
- Nervously fill silence

How to deal with problem narrators

- For those that are nervous, or don't want to talk because they believe they have nothing valuable to contribute, you have to convince them otherwise. Talk with them, and stress that their opinions and experiences are valuable to your research.
- Another problem narrator is the one that talks too much off-topic. Try to use the natural breaks in conversation to redirect questions. Interrupt only as a last resort.

Oral history resources

Telling Lives Oral History Curriculum Guide:

<http://www.incite.columbia.edu/telling-lives-community-oral-history-workshops/>

Project Design for Community Oral History Projects Mary Marshall Clark, Columbia University Center for Oral History:

http://static1.squarespace.com/static/561bf748e4b0f7b2b488f369/t/562e6b30e4b02dda3d4ee6a6/1445882672049/Project_Design_Community_Oral_History_Projects.pdf

Winter Institute online resources:

<http://winterinstitute.org/community-relations/community-resources/oral-history-guide/>

Example projects:

Freedom Riders: The Children Shall Lead

<http://winterinstitute.org/academic-service/documentary-projects/the-children-shall-lead/>

Opening Doors, Forging New Paths at the University Medical Center and the University of Mississippi School of Law

(desegregation of the UM professional schools)

<http://www.umopeningdoors.org/>

“Open Doors” 40th anniversary of the University of Mississippi desegregation:

<http://clio.lib.olemiss.edu/cdm/landingpage/collection/opendoors>

McComb Legacies (McComb MS):

<https://vimeo.com/album/126642>

Winter Institute’s vimeo oral history channel:

<https://vimeo.com/user7908901>