

Oral History Project Design

Queer Newark Oral History Bootcamp

November 16, 2021

11:30 am - 2:00 pm

with Maria Santiago

maria.s.santiago@gmail.com

bit.ly/OHprojectguide

bit.ly/OHprojectdeck

[StoryCorps DIY](#)

[7-minute master class](#) with Daniel Horowitz Garcia

About Me

- Came into oral history in Indonesia in 2015, hooked instantly
- Training:
 - Pratt, MLIS : oral history archives
 - Suzanne Snider's OH Summer School
 - Brooklyn Historical Society
 - The Moth (storytelling)
 - UC Berkeley summer school
 - Columbia summer school
 - StoryCorps since 2016
- Many personal OH projects
- My style: humanist: not an academic, not a historian, not a journalist, not a producer
- Really I'm a crafts person
- Comments & beliefs my own -- not necessarily reflective of StoryCorps'

About You

Show of hands!

Raise hand if...

- You've been an interviewer in an oh-style recording
- You've been an interviewee in an oh-style recording
- You have a personal / professional / passion project you're researching for
- You've been hired to run an OH project and are looking for best practices

Other reasons to be here:

...because it is so human.

At the end of the day, it's just two people talking.
(With a microphone).

The microphone gives you permission to go deeper.

- Opening up
- Listening in

Sharing our lives in an environment of interest & care creates a profound experience.

Indulging in that experience

- Can change you
- Can leave you with wisdom
- Can magnify your own understanding of life

Finally, it just feels so good.

I urge you to lean in to the “so human” aspect. **Anyone can do this.**

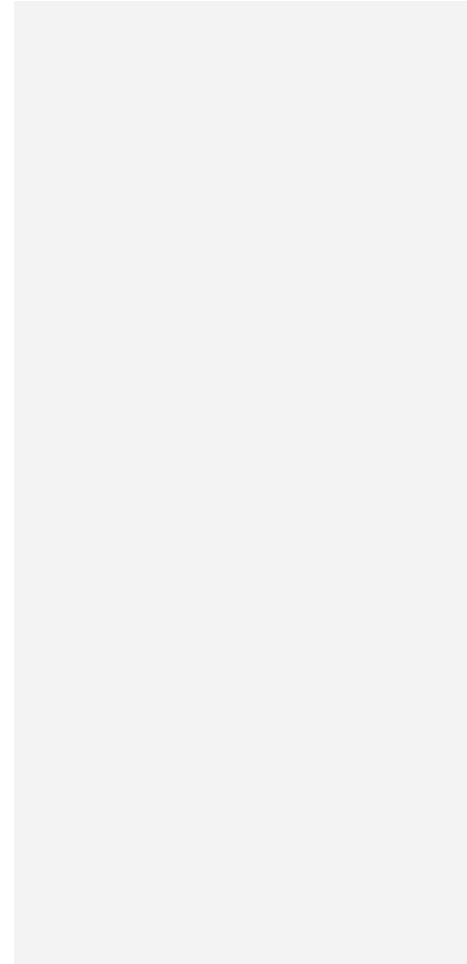
Today's session:

2.5 hours of modulating btwn:

Demystifying “oral history”

Getting familiar w. “interviewing”

Fundamentals of project design



Why So Serious?

INTERVIEWEE

POTENTIAL INTERFERENCE:

- Vulnerable
- What do I say?
- Anxious about historical gravity
- “My responses are definite & defining”
- Fear of leaving out smthg important
- Adrenaline
- Cotton mouth, stuttering

HOPE:

- To be seen
- To be understood
- To leave an audio record:
 - Your voice
 - Your beliefs
 - Your life

INTERVIEWER

POTENTIAL INTERFERENCE:

- It's my job to:
 - Create historical record
 - Manage mood
 - Cover every possible topic
- What do I ask?
- What if they don't open up?
- Over-interfering
- I don't know what's going to happen /
- This could go very wrong
- Nervous about boundaries

HOPE:

- To help paint the portrait
 - provide canvas, space
- To understand
- To be somehow changed

PEER RELATION

POTENTIAL INTERFERENCE:

- Who's supposed to do what?
- Am I allowed to laugh?
- Am I allowed to cry?
- What if we disagree?
- Do we have to have a list of Qs?
- I'm not good at telling stories
- Do I have to talk?
- I don't have anything worth sharing
- / I don't have a story

HOPE:

- To leave a record of your relationship with a loved one:
 - How you talk together
 - Your stories
 - Your relationship
 - What it was like to be alive together

Why practice? It's important to remember + re-remember what it's like to sit in these different roles.

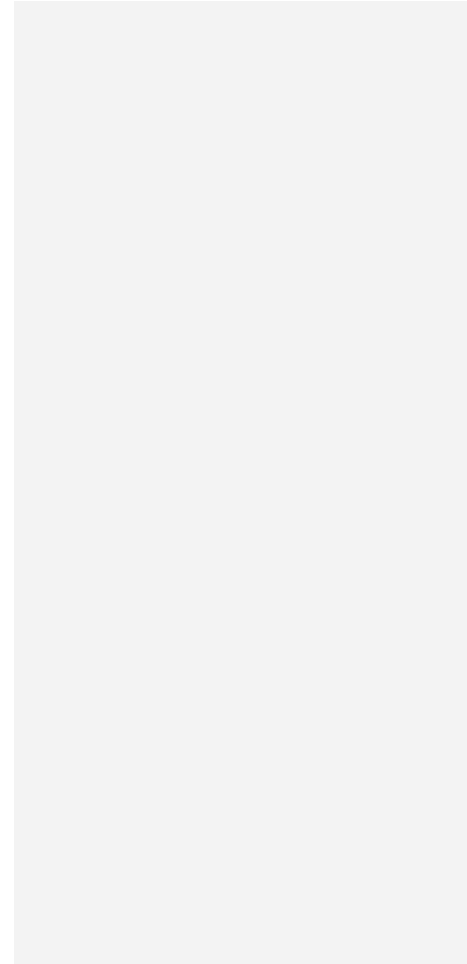
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5 Project Phases

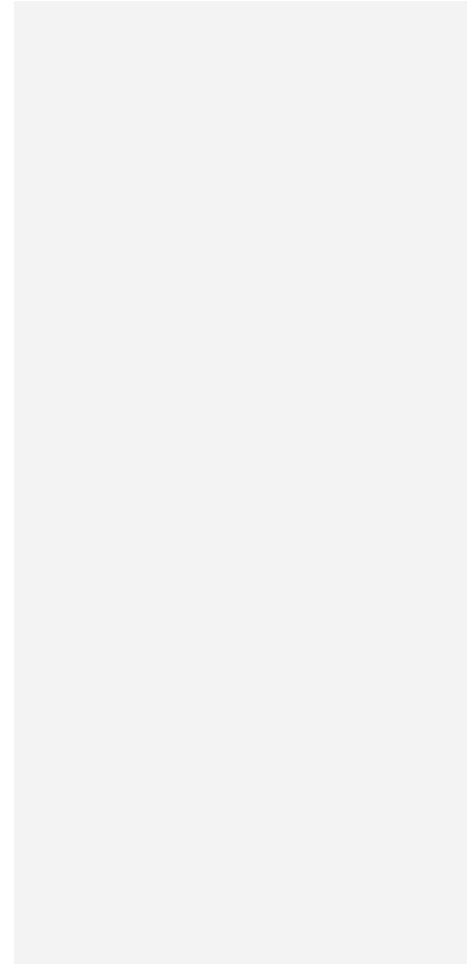
Phase 1: [concept, audience, scope](#)

Phase 2: [participants, interview outline, broad plan](#)

Phase 3: [prep to interview, do the interview](#)

Phase 4: [after the interview](#)

Phase 5: [the interview's afterlife](#)



Agenda

11:05 - 11:15

Orientation

11:15 - 11:25

Interview Exercise 1

11:30 - 11:45

Project Design : Phase 1

11:45 - 11:55

Interview Exercise 2

11:55 - 12:00

Five-Minute Break

12:00 - 12:25

Project Design : Phase 2

12:25 - 12:35

Breakout Group 1

12:35 - 12:50

Five-Minute Break

12:50 - 1:05

Interview Exercise 3

1:05 - 1:10

Project Design : Phase 3

1:10 - 1:20

Project Design : Phase 4

1:20 - 1:30

Project Design : Phase 5

1:30 - 1:45

Breakout Group 2

1:45 - 2:00

Wrap-up discussion / Interview Exercise 4

Please, let's make this a shared, interactive experience

Raise your hand or politely interrupt me to:

- ask a **question**
- insert a **comment**
- **share** an experience
- and/or **reflect** on the material

... your contributions are invaluable.

Interview Exercise 1

storycorps.org/participate/great-questions

6 mins total:

Choose ONE question to ask your partner. Then, switch roles. Each interviewee should speak for approximately two and a half minutes. You do not have to respond to the same question.

What are you
proudest of?

What does your
future hold?

Do you have a
favorite cuisine?

Who are your
favorite relatives?

What was your
childhood like?

Who is your best
friend?

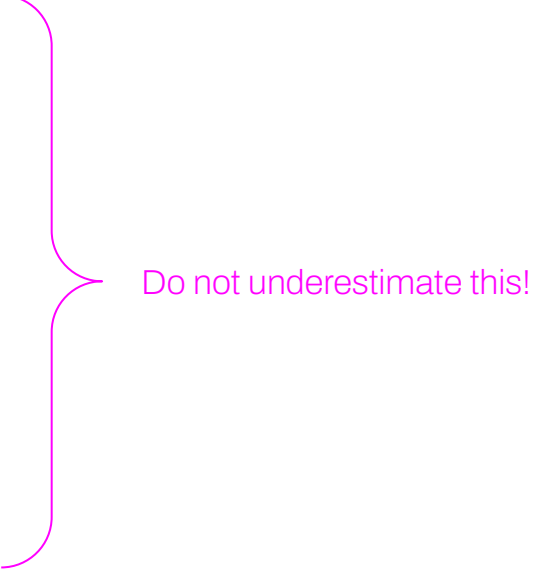
Interview Exercise Reflection Questions

storycorps.org/participate/great-questions

- How would you describe your experience?
- Some of these questions aren't open -- they're closed. How did you deal with that?
 - Did anyone stop responding after a 'yes' or 'no' response? If so, how did you deal?
- Did any respondent not know when to stop talking?
- Did any questioner cut off their partner + prematurely begin follow-up questions?
- Did any respondent have to set boundaries as to what they're willing to answer?
- Did any questioner feel a great urge to ask deeper questions -- perhaps ones too personal?
- What did it feel like to be deeply listened to for a relatively long period?
- Did anyone feel uncomfortable asking a question?
- Did anyone feel uncomfortable responding to a question?
- What did it feel like to practice deep listening?

Purpose of the exercise

Build an understanding of what it's like to be the respondent:

- Respond to a stranger re:
 - Sticky truths (interpersonal relations, honest accounts of What Happened, etc.)
 - Being authentic and truthful
 - Being polite in a “public” space
 - Respecting others’ privacy / stakes in your response
 - Speaking to the historical record
 - It’s a **lot** to juggle
 - ... all in real time, on-tape
 - Personal questions
 - Romantic / relationship / sex life
 - Health status
 - Employment status
 - Financial issues
 - Etc.
 - Speak for multiple minutes while someone’s listening to you deeply
 - Figure out when you’ve said enough, and gracefully bring your response to an end
 - People have a range of comfort levels w. this
 - Awareness that people from the future will be judging you, perhaps as harshly as “we” judge folks from past eras
- 
- Do not underestimate this!

Purpose of the exercise

Build an understanding of what it's like to be the interviewer:

- Ask a stranger about:
 - Sticky truths & personal questions
- Listen deeply
 - Attending to them (not yourself + your own interferences) as much as possible
 - Not get bored or over-stimulated
- “Manage” the respondent
 - Know what's an appropriate amount of straying + when the respondent should be brought back to the original question
 - Free-associate & ask great follow-up questions when the time is right
- Being a good questioner
 - Allowing 4-5 seconds to pass before asking follow-up question
 - Not interrupting
 - No cross-talk
 - Minimizing filler words without being overly self-conscious
 - Respect boundaries while licensing your curiosity + permitting yourself to remain open
 - Read your partner + intuit appropriateness
 - It's ok to make a mistake + learn of a new boundary -- as long as you approach + react w. utmost respect.
 - You don't always know what people are willing to discuss.
- Awareness that people from the future will be judging you, perhaps as harshly as “we” judge folks from past eras

This all isn't awkward bc you're in a workshop --
it's awkward bc it's oral history.

This awkwardness relates to juggling our
self-representation when humanely bringing our
mani-layered, authentic selves to the public arena.

Lean into it.

Bring this awareness into the interview room...

it makes you a better interviewer.

Project Design: Phase 1

“The goal of good oral history project design is to **move the individual narrator back and forth from the individual or personal story to the collective or historical story.** An ideal project design integrates the broad historical timeline of an institution, community, or social movement with individual life histories.

“This ability on the part of the interviewer opens up the individual narrator to become both a historical subject in his or her own right, as well as to invite that narrator to bear witness to the larger events and the social, cultural, and political worlds to which they belong.”

Project Design: Phase 1

Make a project blueprint to:

- 1) Define the mission and purpose of the project as a whole (why the project is important to do, and the nature of the historical material that will be generated; the audience that will benefit from the oral histories).
- 2) Establish the general timeframe of the memories you want to capture, including subcategories of periods and events of importance.
- 3) Break down the topics to be covered in relation to the historical timeframes and events that are central to the history being documented.
- 4) Establish how the general historical story -- as well as individual life stories -- change over time.

Project Design: Phase 1

Ideation of concept:

- What is the goal of this interview / oral history project?
- Do you have a thesis or other question? What are you trying to learn?
- Which ideas or questions are central to your project (what must be answered?), and which are periphery?
- What period of time will be discussed?
- What interview format best represents your plan / in what ways will your collected materials be best understood or most impactful? (I.e., life history style, focused history style -- more on this later)
- What memories, anecdotes, stories, jokes, and specific examples do you hope to evoke?
- Pro tip: (Politely) seek examples of conflict: between two people; btwn the person and themselves; btwn the person + the organization; etc.
 - Conflict is usually a great story + is very telling
- What points of view, frames of mind, motivations and personal narratives do you hope to uncover?

Project Design: Phase 1

Research of concept:

- Read books and articles (popular & scholarly)
- Interview experts & community members “on background”
- What historical events, or major events in the life of your narrator, must be covered?
- If you're unfamiliar with your subject matter: hang out in subject communities: what's it like?
- Has anyone else done a similar project? If so, how would you like your project to be similar / different?
- For a life history interview, research might include:
 - Date of birth
 - Plotting important historical events with the person's age at the time (war, elections, economic events, etc.)
 - Plotting important family events (births, deaths, marriage, divorce, relocation, etc.)
 - Plotting important academic & career events (education, first job, major failures & achievements, etc.)
 - Background interview with other family members to uncover important family stories, etc.

Project Design: Phase 1

Audience + intention:

- Who is your audience?
- What experience / belief do you hope the final product will leave them with?
- What “hard goal(s)” and “soft goal(s)” are most likely to create the desired effect?
- What period of time will your work be “active” or “publicly visible”

Project Design: Phase 1

Scope:

- What time & financial resources do you have to make this happen?
- How many voices / experiences / narrators do you hope to include?
- Budget
- Time period in which to execute project

Project Design: Phase 1

Commit to accessibility:

- Digital divide (different capacities to access, understand technology)
- Sensory impairments (hearing, seeing, attention span, etc.)
- Other constraints (mobility, financial, internet speed, scheduling, geography, equipment, etc.)
- Potential ethical & legal hazards (trauma, emotional & physical safety, legal liability, release forms + informed consent, etc.)
- Professional codes of ethics, IRBs, etc.

Interview Exercise 2

storycorps.org/participate/great-questions

6 mins total:

Choose ONE question to ask your partner. Then, switch roles. Each interviewee should speak for approximately two and a half minutes. You do not have to respond to the same question.

Are you friends
with anyone from
your childhood?

Do you remember
your first date?

Describe the work
you do.

Have you served
in the armed
forces?

Do you have a
religious faith?

What lessons has
life taught you?

Five-Minute Break
Return at _____

Project Design: Phase 2

Participants:

Ideation of community

- Do you already have a specific community in mind?
- Whether or not you do, I encourage you to think expansively about which populations might be able to inform upon your theme.
 - You may be surprised by who might be interested in contributing to your project

Actual access to people: Participants & Gatekeepers

- What voices / people / points of view would you like your project to represent?
- Do you seek diversity or homogeneity of experience?
- At the outset of your project, you may not have access to interview all the folks you'd like to. Build this acknowledgment into your planning; and keep alive the hope that you can interview them once you have the required knowledge, trust, etc.

Project Design: Phase 2

Participants:

Ideate gatekeepers & advisory council members

- Who might be a gatekeeper in the community you're interested in documenting / interviewing?
 - A gatekeeper is a person who can help guide your project:
 - Someone who can help translate or mediate transcultural miscommunications
 - Someone you can turn to to help understand a situation
 - Someone who can provide introductions to other narrators
 - Someone who can lend credibility to your project
 - Everyone on your advisory council is a gatekeeper
 - An advisory council is a body of people to perform the above, and is recommended for medium-to-large oral history projects.
- What ethical issues or power constructs should you keep in mind / might flare up during the project?
- How will I do outreach to both my narrator community & to my audience community?

Project Design: Phase 2

Participants:

Consider different interview types in concert with different interview pairings

Different interview types foster a different dynamic between the participants, and affect what information is shared; emotional depth; professional expertise / specificity; use of shared language; etc. Here are a few common types; be aware that the interview may flow seamlessly through different models. Feel free to experiment / incorporate different pairings & different interview styles in your project.

- Free Association / portrait of a character:
 - Life History (oral history)
- Dialog / shared knowledge:
 - Peer-to-peer
 - Family / intergenerational
- Traditional / hard-questions-based:
 - Academic / scholarly
 - "60 Minutes" or "Terry Gross"
 - "Interviewing the expert"
- Ethnographic
 - Longitudinal (fewer participants, but interviewing them over time -- f.e., once / twice per year for 5 - 20 years)

Project Design: Phase 2

Participants:

Remember: the information revealed in an oral history interview transcends “the content of what is spoken”. The interpersonal dynamic expresses much information not necessarily conveyed in an obvious way during the interview; this information can be interpreted personally, sociologically, culturally, etc. -- by playing with narrator pairings, you may wish to evoke this subconscious information:

- A parent / child pair may discuss a major conflict in their relationship; however, great use of “shared language” may indicate closeness
- The way Person 1 defines “what it means to be an American” may differ when Person 1 speaks with an immigrant from Guatemala; a white man from the Deep South; a five-year-old; a veteran; etc.
- Person 1 may not make overtly racist / sexist / otherwise bigoted comments no matter who Person 1 speaks to. However, multiple interviews between this person and different types of people may reveal Person 1 to treat certain classes of people in different ways than others (microaggression; condescension; different levels of engagement may reveal closeness or estrangement, or “otherness”).

Project Design: Phase 2

Participants:

Matrix Model for Narrators

- Create a list of voices / points of view / people / positions / social roles you'd like to have represented in your project. Wherever possible, fill in with specific names. Feel free to think through different lenses: who from the community would like to be represented? Who has a unique / compelling point of view or experience to share? Who will your audience be interested in hearing from?
- Different aspects of diversity or experience:
 - Regional differences (geography; urban/rural; neighborhoods)
 - Nationality (country of birth / country of citizenship)
 - Income spectrum
 - Gender spectrum
 - Age spectrum (especially if examining intergenerational change / stability)
 - Race / ethnic / tribal spectrum
 - Political spectrum
 - Spectrum in conflict identity: victim / survivor / victor; etc.
 - Education spectrum
 - Intersections of all the above
- Choose your interviewers; be deliberate in choosing pairings
 - The pairing between participants hugely affects the interview outcome: what is said / unsaid, mood, emotional depth; I advise choosing pairings carefully & with intentionality.
 - Will you personally be interviewing all narrators?
 - Will you have a team of helpers?
 - Will you have folks interviewing one another, peer-to-peer?
- Think about proportionality and sampling
 - Are there any populations you'd like to over-represent? Perhaps to under-represent?
 - Based on US population; or a sub-population therein

Project Design: Phase 2

Participants:

... or, go breadcrumb:

Breadcrumb Model for Narrators

- The breadcrumb model is being connected with new narrators by other narrators
 - This can create a biased narrator pool

Finalize the set of people to whom you'll request participation in your advisory council // to be a gatekeeper

Ultimately, your final set of narrators will likely draw from both the matrix model and the breadcrumb model.

Project Design: Phase 2

Interview outline:

Synthesize all of the above to create an interview outline:

- Bulleted & sub-bulleted list of topics to explore with your narrator
 - Bullet all broad topics and issues
 - These may be historical eras or facts; major events in life / history; ideas and philosophies; etc.
 - These may involve the establishment of the fact that something happened (the 5 Ws)
 - Sub-bullet with finer-grain issues
 - These may be questions that explore the narrator's idea of *why* something happened; their personal understanding of it; their feelings about it; etc.
- Sequencing the line of inquiry:
 - For life histories, proceed chronologically
 - For subject-based interviews, start with the basic and proceed to specific (high level → low level)
- Underneath each bullet / sub-bullet, draft open, one-to-two sentence questions for your interviewee
 - Questions should be plain, brief, and should not be “two questions in one”.
 - Feel free to not refer to these questions during the interview, instead following the flow of the narrator.
 - If you find yourself stuck or in a panic, feel free to refer to these questions to get yourself back on-topic.
- Note: You will need one interview outline for each interview; however, the outlines may substantially overlap, changing only details that pertain specifically to your narrator.
- Be realistic about how much ground you can cover in 2 hours

Recognize that in this exercise you're revealing *your own* point of view on this matter; be aware your subject might not understand things the same way. The oral history interview is about understanding the *narrator's* way of understanding or remembering their own identity and the events under discussion -- not about debating the correct way to understand them.

Project Design: Phase 2

Hard Goals:

- An archive (which, where, who can access?)
- A short film
- A listening party
- A documentary (audio, film)
- Art/theatrical performance
- Podcast
- Article
- Book
- Narrative nonfiction
- Dissertation
- Transcripts
- mapping project
- Digital humanities
- Family heirloom

Soft Goals:

- Stimulating discussion
- Building community
- Activist work / building awareness
- Education / research
- Deeper personal understanding of an issue
- To get to know someone
- To document, enliven, or augment existing history

Make a schedule

- Set realistic timelines and goals when scheduling your interviews
- Be strategic: you may like to interview some people more than once; and others you'd like to interview prior to interviewing others (i.e., in order to incorporate their fact set into the set from P 1 into the question set for P2).
- Things to schedule:
 - Reaching out to gatekeepers;
 - Approaching would-be narrators
 - Conducting interviews (and how long each interview should be)
 - Creation of derivative works: (transcripts; audio archive; performance; listening event; etc.)

Make a budget

- Some things to budget:
 - Equipment (recorders, SD cards, etc.)
 - Transportation
 - Compensating narrators for time, childcare, etc.
 - Interpreters
 - Transcription

Write a one-to-five-page document that defines:

- Project intention: thesis or concept
- Statement of audience
- Maximum of 3 hard & soft goals
- List any major issues in accessibility
- List of narrators
- Interview outline(s)
- Scope (no. interviews / narrators; period of time for collecting interviews)
- Budget
- List of interviewers, if more than just you.

Evaluate: Does this project plan support the outcomes I'm seeking?

- Iterate & revise as you go along.
- Don't be afraid to ask key narrators to sit for an additional interview(s), as long as you have more ground to cover.

Break-out Session 1

10 minutes

with your partner:

- Discuss where you are in your projects, with respect to phase 1 or phase 2. Address challenges, wins, questions.
- Workshop an active project being considered by a colleague
- Discuss what we've learned so far
- Design a fresh OH project

Five-Minute Break
Return at _____

Interview Exercise 3

storycorps.org/participate/great-questions

6 mins total:

Choose ONE question to ask your partner. Then, switch roles. Each interviewee should speak for approximately two and a half minutes. You do not have to respond to the same question.

Do you have a
love of your life?

What's an
obstacle you've
overcome?

How do you
celebrate the
holidays?

How would you
like to be
remembered?

What makes you
smile?

Tell me an
important life
lesson you've
learned.

Project Design: Phase 3

Contact participants:

Send out form materials to prospective narrators / gatekeepers / advisory council members.

- These materials should include:
- Introduction letter to participants
- Introduction letter to advisory council members (same concept as above)

Project Design: Phase 3

Contact Participants

Example, from Dr. Paul Sandul of Stephen F. Austin State University (download at: <http://www.sfasu.edu/heritagecenter/6866.asp>)

This sample letter would be updated to reflect your own project, and can be adapted to fit prospective advisory council members, too.

Dear [Interviewee Name]:

My name is Dr. Paul Sandul, and I am an Assistant Professor at Stephen F. Austin State University (SFA) teaching a graduate-level oral history course that is working with the African American Heritage Project (AAHP) of Nacogdoches. I am writing to invite you to participate in a new oral history research project to document the lives and rich community of African Americans in the Nacogdoches area. Specifically, in cooperation with AAHP, you were part of a list of individuals important to and/or knowledgeable of the rich history of the African American experience and community in Nacogdoches over the past several decades. The majority of interviews will be conducted at the place of the interviewee's choosing, however, arrangements can be made for you to come to SFA if you prefer. The interviews will be recorded digitally and interviewees will be provided with paper copies of the final transcripts and a CD of the audio recording. Through the History Department at SFA in collaboration with the Ralph W. Steen Library at SFA, transcripts and sound files will be deposited at, and made available to researchers via, the East Texas Research Center. As per Oral History Association guidelines, all interviewees retain the right to review and edit their interview transcript before the final version is deposited and, if they wish, to place restrictions on the availability of the interview.

The students are scheduled to do the interviewing during the last few weeks of June 2010. Please do note that AAHP has provided us with a rather long and impressive list of individuals to interview, which is a further testament to the rich history of Nacogdoches. With that said, we regrettably might not be able to interview everyone AAHP has helped us to contact because interviewing is subject to how many students actually enroll in the course. If for some reason you receive this letter but are never contacted by a student, I apologize. I hope that you will understand. It will not be because we did not want to interview you, but because we ran out of hands to help.

I sincerely hope that you will consider participating in this important effort to document the history of the African American community in the Nacogdoches area. A graduate student will likely be contacting you via telephone or email in the near future to confirm your interest in being interviewed. Please feel free to contact me as specified below with any questions.

Sincerely,

[Name]

Project Design: Phase 3

Get Equipment

Gather equipment (purchase, borrow, or rent)

Excerpt from “Oral History Interviewing: The Good Interview” by Ronald J. Grele, director emeritus of the Oral History Research Office at Columbia University. Available online at <https://bit.ly/2P6X3PT>.

“Time and energy must be devoted to a focused attention to the process of recording. Unfortunately, most manuals provided by the equipment makers themselves are not that useful... Know your equipment. Experiment with its use. Study the manual, consult. Become comfortable with all its features. Use only quality stock. Beware of bargains.”

Further Resources:

- Audio Transcription Center's “7 Digital Recording Devices for Oral History Interviews”
 - <https://audiotranscriptioncenter.com/2018/03/7-digital-recording-devices-oral-history-interviews/>
- 5-minute video on equipment & set-up for oral history interviewing from the Sustainable Heritage Network
 - <https://vimeo.com/152332399>
- The Sustainable Heritage Network's Guide to Basic Oral History Equipment
 - <https://sustainableheritagenetwork.org/digital-heritage/basic-oral-history-equipment-list>

Project Design: Phase 3

Pre-interview interview

Schedule both *pre*-interviews and *full*-interviews.

During the pre-interview (which can happen over the phone), you may discuss items such as the following:

- Get your narrator's full contact information
- Date, time, location, duration (plan to spend 2 hours interviewing, plus some time before and afterwards for setup and breakdown)
- Ask your narrator which topics they would like to discuss; tell them which topics you're interested in discussing
- Establish any important people / stories / life landmarks
- Discuss what you, the interviewer, hope to get out of it; and what the narrator hopes to get out of it (beyond topics of conversation)
- Share your types of questions, but not a specific question list. This will help prevent receipt of scripted responses.
- Ask whether narrator is willing to take photographs after the interview
- Any topics that are off-limits
- Discuss any emotional triggers
 - If a narrator struggles with PTSD / emotional difficulties, speak to an expert on trauma interviews
- Invite your narrator to bring memory aids, such as old photos, etc.
- Discuss any payment to compensate narrators' labor and time:
 - \$15 to \$25 per hour is one suggestion; do include transportation time
 - Other forms of in-kind payment include: payment for childcare and travel expenses, etc.
- Discuss honestly your ability / willingness to redact, bleep, or "mute" certain content
 - Discuss how you would treat the mention of third parties in ways that would be considered false or defamatory
- Discuss honestly your ability / willingness to make the interview restricted for a period of embargo, or until certain people have passed.

- Discuss honestly your ability / willingness for participants to be anonymous / pseudonymous
- Discuss any mutual ethic or code of conduct (i.e., safety, sexual harassment, etc.)
- Discuss potential uses of interview / where it will be made public (where, when, duration, etc.)
- How long are you, the oral history project manager / interviewer, planning to hold these recordings (and where? Available to whom?)
 - Archiving, preserving indefinitely?
 - Sharing for peer review?
 - Destroying after a listening event / performance?
 - Destruction of full-length audio after creation of podcast?
 - Carve-outs in sharing:
 - With whom may you share full-length interview copies (audio or transcribed) or excerpts (audio or transcribed)?
- Mention any expected derivative works / manifestations using these interviews
 - (i.e., clips to be aired during a listening event; full-length interviews online; a written work; etc.)
- If, later on, you will interpret your narrator's statements in a derivative work (article, book, etc.) and demand intellectual or creative freedom to do so, you must express to your narrator the possibility that they may disagree with your interpretation or representation:
 - "Be aware you may be offended by the way I understand you."
- If you will be fact-checking portions of the interview, you should disclose this to the narrator, as it may affect the way they recall events
- "After the interview, we will sit to discuss what you will allow me to do with the interview; this is called informed consent. You may then sign a document memorializing your wishes."
- "You will receive a copy of your interview, to download over the internet or on a flash drive, to share with family and friends, and to preserve as part of your family records."

Project Design: Phase 3

Pre-interview interview

After scheduling interviews, send participants emails / letters with the following:

- What to expect during the interview (noting agreed-upon date, time location; duration; topics; what's off-limit; whether they'll take photographs or bring memory aids; etc.)
- Interview tips (do not wear loud jewelry, or "loud clothing"; wear comfortable clothes; etc.)

Project Design: Phase 3

Prior to the interview, review basic interview tips:

- Use the restroom prior to starting the recording
- Have all interviewers, narrators, and other participants turn off cell phones, or place on airplane mode
 - This includes you!
- As the interviewer, use headphones throughout the interview
 - Headphones allow the human ear to pick up sounds with the same sensitivity as the recorder; this will allow you to identify audio errors while the interview is in-progress (cell phone pings; AC or refrigerator noises; “loud” clothing or jewelry).
- Soothe narrators’ nerves; assure them they’re going to sound fine.
- Check audio levels prior to hitting record (try to “peak in red” with most conversation happening in green + some orange)
- Choose a quiet room that doesn’t echo
- Consider making a secondary recording with your high-quality smartphone; in the case of catastrophic loss prior to back-up, you will be happy to have a low-resolution version rather than having nothing.
- Choose your file format wisely:
 - .wav: archival quality; large file size (at 16 bit depth, 44.1khz sample rate)
 - .mp3: not archival quality but high-quality audio; small file size
- Begin each interview with an audio ID spoken by *both* interviewer and narrator.
 - Interviewer: “My name is [first name, last name]. Today’s date is [today’s date], and I’m in [city, state] at [name of location] with [narrator’s name] to discuss [broad statement of interview purpose].”
 - Narrator: “And my name is [first name, last name]. Today’s date is [today’s date], and I’m in [city, state] at [name of location] with [narrator’s name] to discuss [broad statement of interview purpose].” [Interview begins]
- Keep a copy of your interview outline visible to you at all times
 - Try to keep away from the narrator’s view (narrator may “jump ahead” or provide scripted answers)
 - Refer to the outline if you find yourself lost within the interview
- Remember to ask open questions
 - Open questions cannot be answered with a “yes” or “no”.
 - Example of a closed question: “Were you and your mother close?”
 - Example of an open question: “Tell me about your relationship with your mother.”
- Follow the flow of the conversation; be improvisational
- Never interrupt your narrator; allow for three full seconds to pass after they say their last word to ask the next sentence
 - Keep a pad of paper handy to jot down follow-up questions; this will reduce the urge to blur
 - Try not to jot / scribble too passionately: the microphone often picks up the sound
- Try not to verbalize while the interviewer speaks
 - It is common to make unconscious verbal affirmations (“Mm-hmm” and “Oh!”) and interruptions (“cross-talk”)
 - These noises may make the audio very difficult to edit for clips, podcast, etc.
 - Cross-talk is impossible to properly transcribe; adds significant cost to transcription fees; cannot be auto-transcribed.
 - Learn to communicate with your eyes
- Keep in mind the “1:10 ratio” as a guide to how much you and your interviewer should speak:
 - The narrator should respond for at least 10 minutes for every 1 minute of your questioning.

Project Design: Phase 3

Exit interview, consent forms

After the interview has wrapped up, share a dialog with your narrator about the interview. Ask questions like:

- How they felt
- What surprised them

Occasionally, a narrator will remember a story that evaded them during the interview; or will want to make a statement to provide additional details, or edit a statement spoken during the interview. It is okay to record a second “blurb,” then add this to the audio file in an audio editing software such as Audacity.

After the interview, sit for the discussion of informed consent + signing of release form / consent document.

- This conversation / document should state:
 - Name of interview project
 - Name of interviewer; interviewer's (or project office's) full contact information
 - Date and location of interview (city, state)
 - Narrator's full legal name
 - Narrators permanent contact information: email address, phone number, address
 - If ever you need to contact a participant about their archival tape, this information will come in handy.
 - Election of publicity & ability to change this election at any time
 - Election of use
 - Granting of copyright or license (or declining to do so)
 - Understanding that this interview may be transcribed, fact-checked, and annotated.
 - Any other provisions as discussed and agreed-to during the pre-interview
- Ideally, you will leave the interview with a signed consent form in-hand.
 - If this is impossible, as the narrator requires time to think it through, be sure to follow-up, as, without it, you may not be entitled to use the interviews.

Project Design: Phase 3

Exit interview, consent forms

Form of informed consent and/or release forms:

- Review the below resources; but be sure that the form you use covers all the nuances of your specific project. Feel free to craft your own using language from some/all of the below.
- When in doubt, have an attorney review your form
 - Further reading: "A Guide to Oral History and the Law," John A. Neuenschwander.

Sample oral history consent forms & release forms:

- Center for Oral History and Digital Storytelling - Concordia University, Canada
 - <http://storytelling.concordia.ca/toolbox/ethics>
- Center for the Study of History and Memory - Indiana University at Bloomington
 - <http://www.indiana.edu/~cshh/forms.html>
- Library of Congress American Folklife Center
 - https://www.loc.gov/folklife/edresources/edcenter_files/samplerelaseforms.pdf
- British Library
 - http://www.ohs.org.uk/ethics/ohs_recording_agreement.pdf
- American Library Association's Oral History Forms
 - <http://www.ala.org/rt/lirt/oral-histories-forms>
- About Institutional Review Boards (IRBs)
 - <http://www.oralhistory.org/information-about-irbs/>

Project Design: Phase 4

Say thank you

Provide copy of interview to participants

Back-up audio, photos, consent forms

Create derivative works (“hard goals” from project plan)

- Send narrator(s) copies of their interviews as part of a thank-you email or letter
- Do not share copies of interviews with others outside the scope of your permissions, as set in the consent form
- Make a copy of audio, photos, and consent forms
 - Use different locations: storage in cloud; on flashdrive; on desktop.
 - Remember: original copy is on SD card.
- Use audio for intended final project, creation of derivative works, etc.

Project Design: Phase 5

The Interview's Afterlife

Write metadata

Archive or destroy audio, photos, consent forms, metadata per participant wishes

Preparing for interview materials' afterlife

- Archive or destroy audio, as agreed upon during the pre-interview, and as memorialized in the consent form.
 - Platforms for sharing archived audio online:
 - OHMS (Oral History Metadata Synchronizer, from the University of Kentucky's Nunn Center)
 - StoryCorps (www.archive.storycorps.org)
 - Or: destroy all backups and originals (i.e., delete from SD card)

Project Design: Phase 5

The Interview's Afterlife

Write metadata

Archive or destroy audio, photos, consent forms, metadata per participant wishes

- Use short, unique file naming conventions that:
 - Distinguish each interview's files from other interviews
 - Collocate all materials related to one interview
 - You may wish to embed chronological or serial information within the file name
 - Example for an entire interview file suite:
 - Convention: YYYYMMDD_[Narrator Last-First-and-Interviewer Last-First]_[file type].file extension
 - Example 1: 20181019_Stauffer-Matt_and_Santiago-Maria.wav
 - Example 2: 20181019_Stauffer-Matt_and_Santiago-Maria.xlsx
 - Example 3: 20181019_Stauffer-Matt_and_Santiago-Maria.docx
 - Example 4: 20181019_Stauffer-Matt_and_Santiago-Maria_Stauffer.jpg
 - Example 5: 20181019_Stauffer-Matt_and_Santiago-Maria_Santiago.jpg
 - Example 6: 20181019_Stauffer-Matt_and_Santiago-Maria_Stauffer-Santiago.jpg
 - Example 7: 20181019_Stauffer-Matt_and_Santiago-Maria_release-Stauffer.pdf
 - Example 8: 20181019_Stauffer-Matt_and_Santiago-Maria_release-Santiago.pdf
 - Pro tip: use file formats that are ubiquitous today. Popular file formats are more likely to be migratable to a future file format. I.e.: if your files are ever “discovered” decades from creation, the data encoded on them would be more likely to be recoverable.
 - Pro tip: Think searchability. With these file names, you can search “photo-santiago” in your computer’s directory and find all instances of photos of Santiago.

Note: If you have a **stable, durable, preservation-appropriate** database separate from your file storage system, you can significantly shorten your filenames to something relatively encoded (“2021_001.wav”). However, if there is any risk that the database & file system could be decoupled, I recommend spending the extra 15 minutes at the file-naming level and giving them fulsome names from the start.

Project Design: Phase 5

The Interview's Afterlife

Write metadata

Archive or destroy audio, photos, consent forms, metadata per participant wishes

- Write interview description, other metadata. I recommend:
 - Short description (1 sentence to 1 page in length).
 - Include:
 - Names, ages, dates of birth of all narrators
 - Relationship between narrators, if they know one another
 - Major topics of conversation (“... discuss Sandra’s difficulties growing up black in apartheid-era South Africa; the reasons she ran away from home, aged 14, to Swaziland, with her boyfriend; her emotional reunion with her mother 37 years later.”)
 - Keep interview descriptions “objective”!
 - Do not use language that casts judgment on the narrator’s actions -- either positive or negative:
 - Do not say: “In this heartwarming interview...” or “Sandra showed courage by...”
 - Instead: “Sandra discusses raising children while depressed and without familial or financial resources; but denies reports that her family was homeless.”
 - Do not say: “Sandra’s father was callous and cruel -- that is why she ran away.”
 - Instead: “Sandra discusses hating her father, and considering him cruel.”
 - Keywords
 - Names, ages of narrators and contact information
 - Names, short biographical information of third parties discussed -- particularly for family heirloom oral histories
 - Subject logs
 - Transcript

Project Design: Phase 5

The Interview's Afterlife

Write metadata

Archive or destroy audio, photos, consent forms, metadata per participant wishes

- Back-up all items to be preserved for long-term
 - General rule is to make 3 copies of all interview materials
 - Organize neatly for easy retrieval
 - Remember digital media is not "forever"
 - General rule of thumb is that hard drives last only five years.
 - Copy data from one (old) hard drive to a (new) hard drive every 4-5 years.

Break-out Session 2

10 minutes
with your partner:

- Discuss where you are in your projects, with respect to phases 3-5. Address challenges, wins, questions.
- Workshop an active project being considered by a colleague
- Discuss what we've learned so far
- Design a fresh OH project

Interview Exercise 4

storycorps.org/participate/great-questions

6 mins total:

Choose ONE question to ask your partner. Then, switch roles. Each interviewee should speak for approximately two and a half minutes. You do not have to respond to the same question.

Who's been the biggest influence on your life?

If you could talk to a younger version of yourself, what would you say?

What is the best thing you've ever done?

When in life have you felt most alone?

What was your first impression of me? Did it change?

What is your favorite breakfast?

Thank you.