Sample Oral History Project Guidelines for Interviewers

*“Oral sources tell us not just what people did, but what they wanted to do, what they believed they were doing, and what they now think they did … Oral sources are credible but with a different credibility. The importance of oral testimony may lie not in its adherence to fact, but rather in its departure from it, as imagination, symbolism and desire emerge. Therefore, there are no ‘false’ oral sources”*

***Alessandro Portelli, oral historian and professor of literature***

Introduction

[name of project and brief description, including goals]

Background Reading and Interview Project Documentation

It is recommended that individuals who will be conducting these interviews read [relevant articles and other literature relevant to the project]. They should also review the following project documentation:

* Interview Consent Form
* Information for Interviewees
* Invitation to participate
* Interview Record Form

Interviewees

The following individuals have been identified as offering useful information and testimony on [the oral history project in question].

[name]

[brief biographical details as relevant to the project].

[name]

[brief biographical details as relevant to the project].

[name]

[brief biographical details as relevant to the project]. Etc. Etc.

Process

The interviews will be conducted [date]. The interview will consist of a series of questions about [describe questions]. Interviewees will be provided with a list of the questions in advance of the interview.

The interviews will be conducted [location]. Otherwise, the interview may be conducted online or at a place of mutual convenience. No other involvement is expected of interviewees.

The project manager [name] will be writing to individuals to let them know that they have been identified as potential interviewees. The interviewers will then write to their interviewees explaining more about the interview process and asking them to agree to be interviewed and to review the consent form. The consent form must be signed by the interviewee before the interview. It ensures that the interviewee has all the information they need, informs them of their privacy rights and signs over copyright in the recording which allows [name of organisation] to use the material for educational and awareness-raising purposes.

Once the interviewees have agreed to the interview they will be sent the questions so they can prepare. A mutually convenient time should be set for the interview. It is recommended to allow [appropriate amount of time].

Audio or Video

We intend to have all the interviews in video format unless the interviewee refuses to be interviewed and cites a dislike of being filmed as their reason. In that case we will agree to a sound recording but we would like a photograph of the interviewee. You should take the photograph as part of the interview process.

Recording the Interviews

The guidance given in this section is intended as an initial introduction to recording the interviews with options for using Microsoft technology on a laptop and Apple technology with an iPhone or iPad. We are also open to any recording method that results in a short interview (between ten and fifteen minutes) of no more than 8GB in one of the following formats:

* **Video formats:** \*.mov; \*.mpg; \*.avi; \*.flv; \*.f4v; \*.mp4; \*.m4v; \*.wmv; \*.vob; \*.mob; \*.3gp; \*.mkv; \*.divx; \*.xvid
* **Audio formats:** \*.mp3; \*.wav; \*.m4a

Microsoft Office software

**To make a video recording of the interview:**

Open the Camera programme and ensure your interviewee is visible and centre stage, click on video icon, click to start recording, click to stop recording. The video should be saved in your pictures/ camera roll folder/subfolder as an MP4 file. Rename the file with the name of the interviewee and the date of the interview.

**To make an audio recording of the interview:**

Open the Voice recorder programme, click on the purple button to start recording, click again when the recording is over. The recording should be saved in your documents/sound recording folder/subfolder as an M4A file. Rename the file with the name of the interviewee and the date of the interview.

Smartphone apps

The guidance below is for interviewers who want to use an i-phone to record the interview.

**To make a video recording of the interview with an i-phone:**

Before you begin, make sure that you have somewhere solid to rest your i-phone or i-pad during the interview. The GorillaPod stand[[1]](#footnote-1) is a good tripod to use for this, but any way to keep your phone at a steady angle would work. Ensure your interviewee is visible and centre stage in the screen. Use the video option in the camera app to record your interview. The recording will appear in your camera roll and from there you can export the mov file. Rename the file with the name of the interviewee and the date of the interview.

**To make an audio recording of the interview with an i-phone:**

If you don’t have an app on your iPhone, the HandyRecorder app[[2]](#footnote-2) works well. You can also use a Zoom microphone attachment. Record the interview. HandyRecorder allows you to email the recording in wav format directly from the app. Rename the file with the name of the interviewee and the date of the interview.

Video-conference calls

It may not be possible to interview everyone in person. In this case we plan to interview them via telephone or conference call technology. One possibility may be to use Zoom[[3]](#footnote-3) or Skype[[4]](#footnote-4) and use the recording functionality offered by the platform. We will test the options once we have more information about the interviewee availability.

Editing the Interviews

It is possible the interviews will need to be edited. This should be discussed with the project manager and the original recording should be retained.

Documenting the Interviews

As has already been mentioned, the recordings need to be given titles with the date of the interview and the name of the interviewee. You will need to document the interview using the Interview Record Form. You should check the spelling of the interviewees name and ask them about their current job, what they were doing at the time of the [name of the project/organisation/event] and their role in it. You can fill out your own details either before or after the event. The form also includes a check box to ensure we collect the signed consent form.

Interviewing Techniques

The goal of the interview is to obtain meaningful answers to the questions which have been designed to shed light on and bring to life the [name of the project/organisation/event]. You will need to prepare well, but it should be an interesting and enjoyable experience for the interviewer as well as the interviewee.

As part of your preparation for the interview, you should test your equipment and the technology you will be using. Make some test recordings and save them in the preferred formats, re-naming them to ensure that your recording will meet the project requirements. If you need help or want to check that your results meet our standards, please contact the project manager.

You should also review the interview process to ensure that you are familiar with all aspects. Decide how you will begin the recording, you should introduce yourself and the interviewee to the audience at the beginning. For example: “I am Jane Dough, one of the interviewers for the [name of the project/organisation/event] and it is my honour to be interviewing Fred Bloggs about his experiences as [details of interviewees role and relevance]. Hello Fred.” Alternatively you can ask direct questions, such as:

* Please tell us your name and your current professional role.
* What was your role/experience during [name of the project/organisation/event]?

You should also think how you are going to conclude the recording and this should include acknowledgements and thanks to the interviewee, for example: “Thank you Fred, that was a really interesting interview, we are really grateful to you for sharing your insights into the [name of the project/organisation/event]. I would like to thank the audience for watching this video and again, many thanks to Fred, goodbye.”

Regardless of how you plan to begin and end the recorded part of the interview, write yourself a script with the questions and any notes you think will be useful to ensure you get full answers. You might also want to include a prompt to get the interviewee to say goodbye at the end too.

You will have had email correspondence or some kind of contact with your interviewee when you were introducing yourself and setting up the interview. Once you have met to conduct the interview you will want to set them – and yourself – at ease. The Interview Record Form requires a little detail about interviewee’s background, we want to know what job they do currently, what they were doing at the time they were working on the [name of the project/organisation/event], as well as their role in developing it. Whilst the project manager and interviewers have some of this knowledge, it is good to get it from the interviewees in person and this initial conversation will help you both to settle down before the recording begins. You should also go over the oral project details with them, although they should have received this information when you first got in contact with them.

Ensure that the interviewee is sitting comfortably and set up your camera so it is secure and steady with the image of the interviewee centre stage. Ask them to remember to speak slowly and clearly since people for whom English is a second language will be accessing the recording. When you are ready you can start the recording as you have scripted it, remembering to speak slowly and clearly yourself. When all of the questions have been answered you can finish the interview as you planned and scripted it. Once the recording equipment has been turned off you have a chance to express your own view on the interview content if there were specific things the interviewee said that made an impression on you. You should also thank the interviewee for their time and remind them that they will receive a personal copy of the recording.

Hand over the consent form to the project manager and take the opportunity to discuss how you felt the interview went. If there is time, you can also listen to the recording and decide whether it needs to be edited. Later you should save the recording in one of the preferred formats and label it as outlined above before emailing it to the project manager. If you plan to edit it, keep a copy for yourself and edit it as discussed with the project manager, before emailing it off to them. You should also confirm who is responsible for sending the recording to the interviewee, together with a formal thank you message.

To re-cap, the process in brief is as follows:

1. **Initial contact with the interviewee:** send the message as indicated in the invitation to participate template and set up the time, date and location of the interview
2. **Equipment and technology test:** make some test recordings and save them in the preferred formats, re-naming them to ensure that your recording will meet the project requirements
3. **Review the interview process:** ensure that you are familiar with all aspects of the interviewing process and write yourself a script to include introductions, the questions and wrap up
4. **Final equipment test:** check the camera is working immediately prior to the interview
5. **Introductions:** introduce yourself
6. **Record Form:** ask the interviewee for the information about themselves, ask them to sign the consent form
7. **Project background:** briefly explain the project and the reason for the interview
8. **Recording:** record the interview
9. **Wrap-up:** comment on the interview as appropriate and thank the interviewee for their time. Hold a debriefing meeting with the project manager to discuss how the interview went and if editing is necessary
10. **Final message to interviewee:** send the recording to the interviewee together with a formal thank you

Tips:

* Show respect and sensitivity
* Be clear
* Ask follow-up questions in order to get a full answer
* Listen actively and show you are listening (eye contact, body language, mirroring[[5]](#footnote-5))
* Don’t fiddle with or be distracted by the equipment
* Don’t speak too much
* Try not to ‘um and ah’

Use of the Recordings

The interviews have been designed and recorded to be used as [details of how they will be published or used]. Final edited interviews will be made available [details]. A transcription of the content will also be provided, to facilitate access to information in the interviews for those who may have limited Internet bandwidth or be otherwise hindered from accessing large files.

Copyright

Interviewees will agree to assign to the [details of organisation] all copyright in their contribution for use in all and any media. This will not affect their moral right to be identified as the “performer” in accordance with copyright, design and patents legislation.

Privacy

Interviewees will be identified by title, name and professional role in the interview recording. Personal contact details will not be published. [the organisation] needs to retain basic contact information to ensure it can reach interviewees in the event we wish to change how we use the recordings. The privacy rights of interviewees, particularly those articulated in [citation of relevant privacy legislation], will be protected.

Contact Details

|  |  |
| --- | --- |
| [project leader’s name and role] | [project leader’s email address] |

*“The documents of oral history are always the result of a relationship, of a shared project in which both the interviewer and the interviewee are involved together, if not necessarily in harmony. Written documents are fixed, they exist whether we are aware of them or not, and do not change until we have found them. Oral testimony is only a potential resource until the researcher calls it into existence.”*

***Alessandro Portelli, oral historian and professor of literature***



  

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1. Available here: https://joby.com/gorillapod-tripods [↑](#footnote-ref-1)
2. Available from iTunes: https://itunes.apple.com/gb/app/handyrecorder/id566291779?mt=8 [↑](#footnote-ref-2)
3. See: https://support.zoom.us/hc/en-us/sections/200208179-Recording [↑](#footnote-ref-3)
4. See: https://support.skype.com/en/faq/FA12395/how-can-i-record-my-skype-calls [↑](#footnote-ref-4)
5. Mirroring is repeating key words or the last few words of the interviewer to show you are following and encourages them to continue [↑](#footnote-ref-5)