CHAPTER 6

Interview Preparation

Now that you have established a solid plan, determined a budget, considered legal and ethical issues, and selected equipment appropriate for your project, the oral history process moves into the next phase of its life cycle: the interview itself. Although the interview is the most recognized part of the oral history process, a good interview requires thorough behind-the-scenes preparation. Interview preparation lays the foundation on which to build the oral history. In chapter 2, we provided an overview of the oral history planning process, including an outline of the interview preparation steps, but here we will discuss these steps in detail.

Interview preparation generally involves two distinct types of research: general project research and narrator specific research. Often, people are attracted to an oral history project because they know about its subject and want to talk with people about it. Project coordinators need to direct this enthusiasm to the interview preparation process so that the interviews themselves will live up to everyone’s expectations.

BEGIN BACKGROUND RESEARCH

Research is essential for taking a project from the level of merely recording reminiscences to collecting the depth of information characteristic of good oral history. It is an important step even for those who are experts. Research helps define the project, provides background on topics to help explore them further, helps project leaders determine which topics are most important, suggests additional topics, and provides background information to inform the interviewer so he or she will be as prepared as possible for the interview.

Planners can help with this stage of project development by pulling together a basic information packet for all participants. This packet—in hard copy, digital format, or a combination of both—can include copies of written histories, newspaper articles, maps, photographs, drawings, excerpts from letters, diaries, and other primary source materials. It can include as much information about the defined subject of the oral history project as planners deem necessary, but it should not be overwhelming.

Internet access and powerful electronic tools for searching online databases are invaluable methods for quickly locating important and useful background information about nearly any topic imaginable. However, be aware of several potential electronic traps. First, unless the focus of your oral history project is fairly obscure or highly localized, searching the internet for material related to your project can lead to informational quicksand that will mire you in an overwhelming mass of related material that no one could hope to sort through, much less understand. So cull through the pages of links and pull out only the material that
pertains specifically to your project. Second, despite the appearance of providing a thorough search, internet inquiries will provide access only to information that someone has decided to put online. Valuable private collections of primary source materials—photographs, letters, personal papers, and the like—may never be accessible electronically, but they could be pay dirt for planners seeking background information for an oral history project. How do you locate such treasures? Mainly by asking around—local libraries, community museums, area history buffs—and getting lucky. One student, through a circuitous series of word-of-mouth recommendations, found a local resident with three-ring binders full of clippings, notes, photos, and other information about an aspect of the county’s history that otherwise had all but vanished from public knowledge. Likewise, if a quick Google search of your oral history topic leaves you empty-handed, don’t assume that no background information is available. County courthouses, corporate archives, schools, community civic clubs, and endless other types of organizations keep records—many of which never will be electronically accessible but may be available to oral history project planners who ask politely to see them as part of the process of collecting background research.

With the packet of information as a base, project participants may wish to do additional research. This can include visits to the public library, historical society, newspaper archives, local institutions, and other specific places that have materials relevant to the project. Depending on the topics, this may involve research in local, state, or national facilities or more online research. Project advisory board members may help by finding collections to review and in identifying possible topics. The goal of all background research is to give project participants, especially the interviewers, a good base of knowledge to use in the interviews. If an interviewer is thoroughly prepared, the interview will be stronger. But because so much information can be available about some topics, planners will need to caution participants not to get bogged down at this stage by continually looking at yet one more source. Oral history interviewers need not become the world’s living experts on topic X. Rather, they need to know enough about the topic to focus intelligently on the aspects of it that matter to their particular project.

Researchers may choose to make notes with pencil and paper, notecards, computers, or other electronic devices. In any case, it is always important to write down or enter any information that relates to the purpose of the oral history project. This includes names (with proper spellings), dates, facts, figures, and information (correct or incorrect) already on the record. Interviewers will want to add to their basic packets any new information they find. All of this can help not only in defining interview topics but also in later development of specific questions.

It is always important to document clearly the source of the information. Keeping unclear notes often results in having to go back to clarify things—a waste of time. Many projects photocopy information if they can afford it, which can help with note taking. Photocopies, when properly identified and cited, are often a helpful addition to a project’s collections. Even if projects have photocopy budgets to support research, project participants should photocopy only information that pertains specifically to the subject, rather than every item reviewed. Material also can be saved to shared electronic files if project participants find that approach easy to use.

It is usually helpful to begin the research by looking into the areas of interest identified in the project’s mission statement. Which information is already well documented? Is the documentation complete? Are there discrepancies or mysterious, unanswered questions among various sources of information? What is already on the record? What information is missing or inaccurate and should be covered in an oral history interview? What is not documented well at all? How important is it to document that? What questions should be asked about a topic? What information comes to light that helps define each topic further?

Research will probably bring up new topics as well. As new topics come to light, they can be added to the list and the same questions applied to them. Reviewing the research that is collected will help project leaders determine what should be covered in the interviews and why this information should be collected.

**COMPILE A BIBLIOGRAPHY**

Project participants should keep a list of all information sources they use. This will be compiled as the project bibliography. It becomes an end product of the oral history project and serves as a reference tool for newcomers to the project and a source for future researchers who want to know what background information created the foundation for the interviews.

**DEVELOP AN OUTLINE RELATING TO THE INTERVIEW TOPIC**

Using the background research, one person or a small group should develop an outline identifying mile-
Sample List of Names and Dates

1901 Brothers Martin and Marvin Jones develop a product for preventing power loss in engines. The Jones brothers were awarded a patent on their invention.

1902 The Jones Production Company was incorporated with an issue of 100,000 shares of capital stock at $75/share.

1909 Everett Smith joined the company as general operations manager. He developed the major market for the product.

1914 The company became known as Jones Company, Inc.

1918 The company received its first government contract.

1921 The company employed 350 people prior to the "farm crash" and the start of the agricultural depression.

1927 The company began to diversify its product line by adding smaller sizes in an attempt to stave off losses.

1934 The company was sold to Charles Anderson and Sons.

1939 The company began making engines that featured its product.

1940 The company received a government contract to make engines using its product. It employed 750 people working three shifts.

1944 The company received an award for its war work.

1945 The plant voted to unionize under the leadership of John Ross.

1949 Charles Anderson retired and his sons, John and George, took over company management.

1950 The company built a new plant at 37th and Randolph Streets. The old plant at 12th and Elm Streets was torn down and the land was sold to the city. Employment was at 450 people working two shifts.

1953 The company received a government contract to build engines.

1956 The company negotiated a deal with Montgomery Ward to distribute engines through their stores.

1959 The union staged a major strike for better wages and conditions. The strike lasted for 3 months and resulted in raises up to $3.00 per hour and increased safety procedures.

1962 The plant burned to the ground.

1964 The plant was re-built and had its grand opening. The product line was expanded to include engine-related products. Employment was at 300.

1968 The workforce was fully integrated for the first time.

1973 The Anderson brothers sold the company to a XYZ Company, Inc., a national distributor of engines and related equipment.

1979 Sales were affected by the Energy Crisis. Employment at 200.

1985 XYZ Company expanded the product line to include engine-related equipment from plants it owned in other states.


1998 Engines International, Ltd. sold its holdings, including the company, to Sheridan, Inc., an international conglomerate.

2002 The company celebrated its centennial. Employment at 375.

Figure 6.1. A sample list of dates and events for an oral history project.

It may take the form of a simple timeline of dates, key events, and relevant players. It also might include a glossary of jargon and appropriate definitions of terms particular to the subject at hand. Summarizing such basic information in a readily accessible form will help everyone to focus on the material. It also will result in a useful resource document. It can help guide continuing research because gaps in available information can become readily apparent, and it can help participants become familiar with vocabulary narrators are likely to use. When you’re ready to begin the interviews, it also serves as a good interviewing tool.

USE THE RESEARCH TO BUILD AN INTERVIEW GUIDE

In addition to giving project participants information about the subject, general background research helps planners identify topics or areas where information is sketchy or ambiguous or reveals mysterious, unanswered questions. These are all topics you’ll want to cover in the oral history interviews. Oral history is
used to document information—including opinions, interpretations, and points of view—that otherwise is unavailable and subject to loss. By familiarizing themselves with existing information, interviewers can identify gaps in what is already available and determine how to fill them through oral history.

Developing a list of themes or topics is a first step in focusing an interview.

Background researchers should keep a list of topics either omitted or inadequately covered in the written materials and any other topic ideas to include in an interview. Coordinators should regularly look over these lists, analyzing how each topic relates to the mission statement. All ideas that meet the criteria should be included on a master interview topic list. Review and analyze these lists regularly to keep the project focused. They will become the basis for designing the oral history interviews.

IDENTIFY POTENTIAL NARRATORS AND DETERMINE THEMES OR TOPICS TO COVER WITH EACH OF THEM

General project research is an essential way to identify potential narrators. Although you might know from the outset some of the people you’ll want to interview, general background research often leads to others whose knowledge is essential to project success. Background research will also help identify additional, perhaps previously unknown, types of information needed to fill gaps in knowledge and understanding, leading project coordinators to seek out potential narrators who can fill those gaps. The background research also can help you decide which people might have enough information for several interview sessions, while others might require only a shorter, single interview session.

As a rule of thumb, be conservative in planning the number of interviews you can complete. If your initial goal is to interview everyone whose name surfaces, the task will be so daunting that everyone involved will be frustrated and defeated from the start. Instead, begin with no more than three to five interviews—up to ten hours. Set a goal of ensuring that these are well researched, well structured, and fully processed. When this is done, look realistically at what it took to meet this goal and determine what is manageable for your group to complete additional interviews. A handful of well-done interviews can inspire confidence in the project and energize participants to keep going. Having something concrete to show for your efforts also can generate more financial support for future work.

Oral history focuses on collecting firsthand knowledge. As such, narrators should be selected because of their knowledge about the interview themes and topics. They also should represent a variety of perspectives and backgrounds. In fact, an oral history project often specifically intends to seek out perspectives that are not already on the record. This will enhance the results of your oral history project, broadening the base of information you collect.

A project Edward Nelson and Robert "Skip" Drake and others developed in Minnesota to collect information about the Civilian Conservation Corps (CCC), for example, easily could have used all of its available resources interviewing the hundreds of men who enrolled in the Depression-era camps. The network was still strong, relatively little documentation was on the written record about enrollees' time in the CCC camps, and narrators could be found quickly because many were willing to tell their stories. But they could only tell one part of the story. So the oral history project included others, such as U.S. Army personnel who ran the work camps in which the enrollees lived; representatives from the agencies that developed the projects on which enrollees worked, including former forest service personnel and U.S. Army personnel, and others involved with various projects or agencies; adult work leaders and crew leaders assigned to supervise enrollees at work; and members of racial or ethnic groups who were or were not welcomed into the camps. Making an effort to include many perspectives from people involved in all sides of the issues enhances a project and gives it the depth that characterizes good oral history.

Lists of possible narrators are sometimes easily compiled. At other times, it can take considerable legwork to find people who have firsthand knowledge about the project’s themes or topics and who are good prospective narrators. In addition to relying on project research to identify possible narrators, advisory board members and informal networks of individuals knowledgeable about the project and its purpose can contribute to the list. Depending on the subject, informal networks can generate a long list of possible narrators that will have to be winnowed down to a manageable size.

Good narrators for an oral history interview are people who:
• have firsthand, previously undocumented information about project topics or themes
• have strong powers of observation
• can articulate their thoughts and memories effectively
• have an ability to understand the basics of the oral history process as explained by the interviewer or project coordinator and are willing to participate, including signing a donor form
• are willing to give an account of their memories of the project topics or themes
• are reasonably comfortable with interview equipment in either audio or video settings

Narrators inevitably bring their own biases to project topics or themes. Their memories also reflect their perspectives on what happened and why, the ways in which they have organized their understanding of the past, and their frames of reference on what is or is not important. They are also often influenced by thoughts and ideas that have occurred since the event or time period. Narrators are chosen for a project because their views about it are important. Each narrator brings a unique perspective to the project’s topics or themes; collectively, those perspectives enrich the historical record.

It often helps to think about choosing possible narrators in terms of the information each can bring to your project. Narrators may be chosen for knowledge about a certain time period or because they represent a certain perspective about an event related to the themes or topics. They may be chosen because they have a long-term perspective, although it is never necessary to interview the oldest person around just because he or she is old. They may be chosen because of their knowledge about the themes or topics. It is also not always necessary to interview the most visible local historian or the most prominent person associated with an event. Often, in fact, such local notables have either told or written their stories many times, and those accounts are already part of the existing record. Sometimes they have repeated the stories so often, almost as a rehearsed performance, that it’s impossible for them to explore the event more deeply, which ideally is what you want in a good oral history interview. Project coordinators should instead look for people who have firsthand knowledge and are willing to communicate this information clearly and effectively, answering the interviewer’s questions to the best of their ability. Often, they may be people who have information about just one theme or one aspect of the project but whose perspective is nonetheless central to fully exploring the topic.

The names of potential narrators should go into a pool for consideration. Depending on your project’s resources, you’ll likely have to make some choices. The most helpful approach is to set priorities, identifying narrators you think are most critical to include and working down the list as resources are available. Although you may identify additional criteria based on the needs of a project, a person’s ability to provide information about the interview topics should be the primary factor when choosing narrators. Using this as a guide to match potential narrators to interview topics about which they are most knowledgeable will help organize the project and will ensure inclusion of narrators whose information is most useful.

Project participants, including the coordinators, should decide who will be interviewed. Although supporters and others interested in the project will have ideas about potential narrators, project coordinators and interviewers who have been involved in the research are in the best position to know who should be interviewed and what the interview priorities should be. Names of potential narrators will continue to surface as the project progresses, and the narrator list and priorities could change based on this new information. As mentioned previously, it is not a good idea to advertise for narrators. You should reserve the right to determine who will be on the final narrator list. A public solicitation for narrators often carries with it the implied promise of an interview, which may not serve the project’s purpose.

Once possible narrators have been identified, project coordinators should begin contacting them, requesting their involvement in the project. This is best done by letter or email, although a telephone call might be appropriate if the individual knows that he or she is likely to be interviewed for the project. Otherwise, a written communication is best because it allows potential narrators to receive a clear explanation of the project and background about their expected involvement. A sample letter, along with samples of other suggested correspondence, is included in appendix A. The designated interviewer should follow up the letter with a telephone call. This provides an opportunity for the interviewer and narrator to talk informally, allows the interviewer to answer additional questions, and gives the narrator a chance to make a verbal commitment to be interviewed. Some narrators, when first contacted, may be unsure of their ability to contribute effectively to the project. The

Interview Preparation 67
telephone call can allow the interviewer to address these questions and concerns.

After the first narrators have agreed to be a part of the project, interviewers should begin narrator-specific research. This step creates the structure for the interview. An interviewer should work on only one interview at a time, selecting or being assigned narrators in priority order from the pool of names.

Narrator-specific research helps structure an interview.

Narrator-specific research involves learning as much as possible about the person to be interviewed and his or her role in the subject at hand. This may include such details as work history, personal history, family history, political history—anything that gives the interviewer the necessary background to ask good project-related questions with appropriate follow-up. Such research also helps build rapport between interviewer and narrator during the interview. The interviewer should rely on as wide a variety of background materials as necessary to become fully informed. This often includes online research as well as a review of related interviews and trips to the historical society, library, or other locations containing resource information. It may also include a review of maps, visits to sites that are important to the interview, and additional work with primary sources. As with the general background research, it is important not to become bogged down in the wealth of information that might be available about some narrators. In other cases, it might be difficult to find documented information about a specific narrator. Asking the person to provide biographical information prior to the interview, such as that listed in the biographical information form, can help by making additional information available to guide the research. In any case, narrator-specific research can focus on the context of the narrator's background to give the interviewer as much knowledge as possible.

DEVELOP AN INTERVIEW OUTLINE OR GUIDE

Oral history project planners and interviewers often find it useful to think of a three-part research funnel that guides development of the interview content. First, at the mouth of the funnel, is the thirty-thousand-foot view of overarching themes that emerge in the research process. Then, within each theme, there are topics, or smaller building blocks within the larger theme. And, finally, within each topic is the development of specific, focused questions, which often relies on narrator-specific research.

The Oral History Association’s publication Doing Veterans Oral History offers some clear examples. It suggests that an interview guide developed for an interview with a military veteran might include these overarching themes: “entering military service, daily life in military service, assignments in military service, service in a combat zone, life after military service, reflections about military service.”

While those are overarching themes, each one can be subdivided into narrower topics. For example, entering military service might include the following topics:

- brief description—life before military service
- entering military service and choice of military branch
- training

Finally, each of the specific topics can be fleshed out in greater detail with specific questions. Using the same theme and its topics, here are some examples:

- Talk about your life before going into the service. Education? Work experience?
- Describe any family military background/traditions.
- Any other family members in service? Who? When? Why/why not?
- Family response to you going into service
- Tell me about when, why you went into service and what branch.
- Enlisted? Drafted? How did it all come about?
- Recollections about taking the oath?
- First days in the military
- Basic training—when and where?
- Most memorable moments
- Particular skills? Special trainings?
- What did you learn about military life? Experiences that stand out?

The biographical information you collect about individual narrators will guide development of specific questions. In the above example, you likely will already have found out the service branch in which the person served as well as training details or particulars of the person’s military service. So while the above example includes fairly generic questions, your interview guide for a particular individual might be more detailed.
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SAMPLE INTERVIEW OUTLINE, ALSO CALLED INTERVIEW GUIDE

Narrator Name
Project Name
Place and Date of Interview
Interviewer Name

Interview Introduction: Today I am interviewing John Doe, the first president and a long-time board member of the ABC Foundation for the ABC Foundation Oral History Project. It is [insert date], and we are in the foundation board-room. I am Jane Smith, the project interviewer.

Narrator Background
Your background and education
How hear about foundation
What interested you about foundation, why become involved
Recruited, accepted position on board
Foundation mission and purpose as described to you
Describe board training/orientation
On board from 1995–2013—time of transition and change

Narrator Board Involvement
First vice chair (dates)
Served under presidents (names)
Major board initiatives during your tenure as first vice chair
Your goals as first vice chair, discuss
Treasurer (dates)
Served under presidents (names)
Describe major initiatives or changes during your tenure
Audit Committee and chair (dates)
Served under presidents (names)
Roles and responsibilities
Governance Committee (dates)
Served under presidents (names)
Describe major initiatives or changes during your tenure
Investment committee (dates)
Served under presidents (names)
Describe major initiatives or changes during your tenure
Grants committee and chair (dates)
Chair (dates)
Served under presidents (names)
Major grants initiatives of foundation during your tenure
(Insert names of each)
Discuss priorities and how determine
Changes in priorities, describe
Mission of foundation and how carried out
Roles and responsibilities of committee and board members

(Continue with questions about narrator’s work as long-time foundation board member.)
Here's another example from a student project aimed at documenting information about one state’s century farms, those that had been continuously in the same family for one hundred years or more. The narrators all were men and women who were members of the second or third generation to live on the family farm and who were either children or teenagers during the Great Depression and Dust Bowl years. Overarching themes included original founding of the farm, technological changes in agriculture, and day-to-day life on the farm. Here is an example of topics and selected questions developed within the theme of technological changes in agriculture:

- Farm equipment
  - Transition from horses to mechanized equipment
- Irrigation
  - Suitability of land for irrigation on this farm
  - Availability of water source—impact of Bureau of Reclamation dam building, irrigation canals?
  - Development of center-pivot irrigation technology—cost? Benefits?
  - Suitability for particular land profile? Impact on crop varieties?
  - Water conservation efforts? Impact on farming practices?
- Electricity
  - Life on farm without electricity
  - Impact of creation of Rural Electrification Administration (1935, part of FDR’s New Deal)
  - Process for bringing electricity to rural places; when did this farm get it?
  - Impact of having electricity—on agricultural operations? Daily life?
- Hybrid seeds
  - Typical production levels before hybrid seeds
  - Earliest examples of using hybrids—pros/cons? When adopted here?
  - Impact of hybrids on agricultural practices? Farm income?

As with the veterans interview guide, specific questions would be customized to reflect narrator-level research. So questions about using hybrid seeds, for example, would not be relevant for a cattle rancher who did not raise crops. In all cases, the interviewer will want to add follow-up questions that aren’t necessarily on the interview guide, depending on how the narrator responds. Also note in both examples that it’s not necessary to write questions out word for word. Phrases and key words are sufficient to help keep you on track as you work through the interview. And when questions are written out as complete sentences, interviewers may be tempted to recite them word for word like a telemarketer, an inappropriate tone for an oral history interview.

The funnel approach of theme-topic-question can become more elaborate depending on the nature of the oral history project, with subtopics and questions for each subtopic. But, as a general rule, try to avoid making the interview guide more complex than necessary. Committing to a highly structured question guide can have the unintended consequence of straightjacketing an interview and preventing the narrator from volunteering information that otherwise doesn’t seem to fit into the predetermined format.

As the examples illustrate, many interviewers find that approaching topics chronologically is helpful, since that is often how people remember their experiences. If the questions are likely to include emotionally charged or sensitive topics, it’s usually best to plan for those later in the interview, after the interviewer has had a chance to establish a rapport with the narrator. The interviewer should use the outline to guide the interview but should be prepared to follow the narrator’s train of thought and remain flexible in how and when topics are introduced.

The interview guide should reflect the purpose of the project. For example, if the focus of an interview is a person’s experiences as a nurse in the Vietnam War, the interviewer probably would not take interview time to ask detailed, in-depth questions about union involvement or farming activities, though the person may have considerable firsthand information on those subjects as well. Similarly, any pre-interview contacts or correspondence with the narrator should make it clear that the Vietnam War nursing experiences will be the focus of the interview. Based on what is already known about the designated subject of an oral history project, the interviewer will want to concentrate on eliciting information the narrator can add that fits overall project goals.

The interview guide should contain as much information as the interviewer needs for the interview. This can include research notes about names, places, dates, or any other details that will help jog the narrator’s memory. It should not be so voluminous, however,
that the interviewer spends more time shuffling notes and looking for details than asking questions and listening to the answers.

An interview guide or outline is the list of topics and notes about questions specific to the narrator’s knowledge. The interviewer uses the outline to guide the interview.

Interviewers should be familiar with everything in the interview guide and should know the reasons for including each topic and how each fits into the overall project structure. They should be prepared to hear new, firsthand information and to clarify anything they don’t immediately understand. They should also be prepared to be flexible, since a narrator might want to talk about things in a different order than listed on the interview guide. The interviewer should use the guide to ensure all topics have been fully covered. Finally, interviewers should avoid including their own opinions about what they think, either on the interview guide or during the interview. Interviewers should not, however, see their role as a passive audience recording without question whatever a narrator says. Oral history interviews are co-created by knowledgeable, prepared interviewers and narrators identified for their knowledge of the subject at hand. So interviewers should be prepared to pin down information, ask pointed questions, play devil’s advocate, and probe beneath the surface for new information about the interview topics.

SCHEDULE THE INTERVIEW
When nearing completion of the narrator-specific research and development of the interview guide, the interviewer should contact the narrator to schedule the interview. This may be done by telephone, but it should be followed up with a letter or email confirming date, time, and location. The letter should also include a request for a photograph of the narrator for the master file.

Oral history projects usually include a face-to-face pre-interview or, more commonly, a preliminary telephone contact with potential narrators at this point. This involves a short, general discussion with the person about the interview and gives the interviewer a chance to introduce himself or herself to the narrator, which helps build rapport. Some interviewers like to collect biographical information from the narrator at this point. It also provides an opportunity to answer any further questions about the oral history project and to explain the recording process and the use of the donor form. And it can be a good time to discuss the interview topics in general terms with the narrator, though there are several words of caution here. Be careful not to give the narrator lists of the questions to be asked. You may think that this will help the narrator prepare for the interview, but in reality it often results in rehearsed answers, not vibrant responses with the depth that oral history at its best can elicit. Occasionally, narrators who have seen a complete list of questions will write out their answers, which they then will want to read into the microphone. This is not oral history. Sharing the interview guide also can inhibit inclusion of any additional information not on the outline, information that may add depth to the interview. And do not allow the pre-interview discussion to include the telling of specific information you want to cover in the interview. When this happens and you later ask for the information again in the interview, the narrator often either refers to the earlier conversation rather than answering the question or repeats the story in a less lively way than you heard it initially. As a follow-up, the interview confirmation letter can summarize your discussion, listing the general topics to be covered in the interview.

CHOOSE THE SETUP FOR THE INTERVIEW
A face-to-face pre-interview meeting also can serve another important purpose: It allows the interviewer to check out the setting where the interview will take place. Many oral history interviews occur in the narrator’s home, a familiar environment that can have a positive effect on the interview. Schools, museums, places of business, libraries, even recording studios are other common interview locations, and each has its own advantages and disadvantages. The goal is to conduct oral history interviews in places where you can control sound (and visual) quality and where the narrator and interviewer will not be interrupted. Business offices, for example, are appropriate places for interviews only if the narrator can prevent telephone or other interruptions. Whatever the setting, it should be a place where the narrator will be comfortable and where the setting itself does not create distractions or make the narrator ill at ease. (See the checklists below for details about the mechanics of setting up an oral history interview.)

Thinking through the setting is an important part of the process, for it can affect the outcome of the interview. As an example, one community embarked on a project documenting the installation of missiles in its vicinity during the height of the Cold War. Because
project planners were interested in creating both audio and video recordings, they decided to do most of the interviews in the city library, either in a public studio there or in an adjoining reserved room. The same topics and themes were covered in all the interviews, and the choices about who was to be interviewed in which setting were based primarily on the availability of the narrators. One person specifically did not want to be interviewed on camera at the library, and another would agree only to an audio interview at home. While the setting of an interview is unlikely to be the sole factor contributing to particular narrator behavior or responses, the project leaders noted some curious differences in interview content that seemed to be related to the interview setting. The video interviews in the studio at the public library featured repeated tellings of the more dominant public side of the story expressing support for the missile installations. Interviews in the adjoining room, in which there was no video and only the interviewer and narrator were present, produced a less commonly voiced private side of the story, including expressions of fears for the future. And the narrator who insisted on being interviewed at home recalled active resistance to the missile installation, reflecting what had been a decidedly minority viewpoint in the community and one that even many years after the fact was not widely acknowledged in public.

Did the more public, formal setting, complete with interviewer and camera operator, lend itself to eliciting the popular public narrative about the missile installation? Did a nonthreatening home environment with only an interviewer present create a safety zone for the narrator to express an unpopular view? One can never be certain. But the narrators' responses at least suggest that the context in which an interview takes place—including the presence or absence of video—is an important element affecting an interview’s content and character.

**PRACTICE WITH THE RECORDING EQUIPMENT**

Interviewers should be thoroughly trained on using the recording equipment and should practice with it repeatedly before using it for the first time in an interview. They should know how to use it unobtrusively and with confidence and how to handle minor difficulties in the field. Always begin by reading the manual that comes with the equipment. It will help you understand what all the dials, switches, and buttons mean and how each works to control the recording process. You will want to know how to set sound levels and how to troubleshoot.

**HEAD OUT FOR THE INTERVIEW**

You’re almost ready now for the next big step: conducting the oral history interview. All the planning so far is aimed at making the process flow as smoothly as possible. Some oral history projects put interview kits together that include all the necessary tools. Such a kit can include:

- recorder
- microphone, cables, and microphone stand
- AC adapter/transformer and extension cord
- media (it is wise to take more than you could possibly need)
- batteries
- notebook (often in an easy-to-use “steno” format, six by nine inches)
- pencils
- folder containing the donor form (two copies—one for the master file and one to leave with the narrator), the interview guide, the biographical information form, and copies of correspondence with the narrator
- camera to take a picture of the narrator in the interview setting (this is necessary for audio interviews and is helpful to add to the master file for video interviews)

Finally, arrive on time. A prompt arrival will start the process out right. If there has not been a pre-interview meeting, this may be the first time the interviewer and narrator meet, in which case it is even more important not to be late.
Preparation for the interviews is not glamorous. Nor is it as exciting as the actual interview. Without adequate preparation, however, the oral history interview will not fulfill its potential.

CHECKLIST FOR SETTING UP AN AUDIO INTERVIEW

✓ The narrator is in a comfortable spot where he or she can relax and focus on the interview and where the narrator and interviewer will not be interrupted.

✓ Pay special attention to the audible environment. Be sure that the narrator’s chair doesn’t squeak or make other noises and that other audible distractions—pets that bark, meow, or chirp, chiming clocks, dishwashers, telephones, lawn mowers, and the like—are minimized. People will tune out such extraneous noises, but recorders will faithfully record them all. Ask the narrator to turn off mobile phones or other devices, and be sure to turn yours off, too.

✓ The interviewer should sit no more than about six feet away, facing the narrator. The two should be able to hear each other clearly and maintain eye contact.

✓ Use a table or other sturdy surface next to the interviewer to hold the recorder within easy reach to monitor it and change media as necessary. It is best to position the recorder out of the narrator’s direct line of vision so he or she will focus on the interviewer, not the equipment, but never hide it from view. Oral historians do not engage in clandestine recording.

✓ An omnidirectional microphone should be placed no more than two or three feet from and pointed at the narrator. Carry a long enough microphone cable to facilitate the best placement of the microphone and recorder.

✓ If lavaliere microphones are used, clip one on the interviewer and one on the narrator, each about ten inches from the speaker’s mouth. Remove jewelry and scarves or jackets made of crisp fabrics. All can cause rustling noises as the speakers move. (For more details about microphone choices, see chapter 5.)

✓ Plug the audio recorder into a wall or floor outlet whenever possible, bringing long extension cords to facilitate this. Be sure to place extension cords in such a way that no one will trip on them.

✓ Carry back-up batteries for the recorder to use in emergencies or where electrical outlets are unavailable or impractical to use.

✓ Decline offers of food or drink. While interviewers will want to be sociable, an oral history interview is not, strictly speaking, a social occasion. Coffee cups on saucers, ice in glasses, pop tops on cans being opened, and other food or drink consumption all make noise the recorder will pick up. Narrators will understand if you explain to them that you want to minimize any extraneous noise that might mar the sound quality of the recorded interview.

✓ Do a sound check with the equipment to be sure it is working properly and the voices are being picked up clearly. Keep it simple by asking the narrator to give his or her name and address and chatting about something neutral while unobtrusively checking recording levels. Fussing over the equipment can make an interviewer nervous.

✓ Use headphones to continuously monitor the sound, allowing you to identify and correct any problems.

CHECKLIST FOR SETTING UP A VIDEO INTERVIEW

✓ Read and follow the checklist for setting up an audio interview. Many of the considerations for arranging the interview setting are the same for both formats.

✓ Refer to the section of chapter 5 that discusses the questions to consider in determining how or whether video recording will enhance the oral history.

✓ It is seldom advisable for the interviewer also to be the equipment operator in a video interview, unless the interviewer is both a skilled oral historian and a skilled camera operator.

✓ Unless a video interview will take place in a studio or other controlled setting, plan to visit the site in advance, preferably with people who will be operating the camera, microphones, lights, or any other equipment that will be needed for the recording session.

✓ Because a video interview likely will involve more staff, who generally may be paid, and possibly rented locations such as production studios, consider developing a more detailed interview guide to ensure the best use of a specific block of time. You may not be able to
extend the interview even if the narrator has important things still to say, so try to make sure the interview covers all the essentials in the allotted time.

✓ Indoor video interviews should be shot in soft light that appropriately illuminates the setting. Avoid overhead lighting, which results in poor quality video. The narrator should not sit in front of a window or other source of natural light.9

✓ The background setting should not overwhelm the narrator. Studio backdrops, like dark curtains, may sometimes be available, but in a person’s home or place of business, try not to place the narrator in front of a blank wall. It may help to add visual depth to the recorded image if you pull the narrator’s chair slightly away from a wall or backdrop. In any event, check that items in the background—lamps, potted plants, pictures on walls, and the like—do not appear to be sprouting out of the narrator’s head.

✓ Always frame the shot so it is in focus with the narrator centered in the picture and at eye level with the camera, a psychologically and emotionally neutral position. Give the narrator what videographers call “head room” and “look space,” meaning that the camera is not at too close range.

✓ A head shot from the midchest or shoulders is customary; never cut the person visually at the neck, waist, or knees.

✓ If more than one narrator is in the video interview, position everyone so all their faces are clearly visible and so that the interviewer can maintain eye contact with all of them. This is sometimes done using a V format, with the interviewer sitting on the open end facing the narrators.

✓ Narrators should be asked to wear uncluttered clothing in neutral or dark colors. White shirts and blouses reflect light and make filming natural skin tones difficult.

✓ The camera should be placed on a tripod to ensure stability and focused on the narrator with little or no change in the camera beyond the essentials to capture movement once the shot has been framed.

✓ Even though the camera has a zoom lens, do not zoom in and out on the narrator. This is a televised interview technique that oral historians do not use. Instead, use the zoom lens for close-ups of photographs or other materials you wish to document as part of the interview.

✓ The interviewer’s questions should be heard clearly, but an interviewer generally is not seen, unless the interview is being conducted in sign language. The interviewer should be positioned to look directly at the narrator, with the camera over the interviewer’s shoulder. If project coordinators want the interviewer to be seen, a second camera will be needed because one camera always should be on the narrator.

✓ When filming on location, be aware that lighting and background sound elements can change during the video recording, so plan for such possibilities. Always stop the interview if noise from airplanes, highways, farm machinery, or other intrusive sounds occur, and wait for conditions to return to normal.

✓ Record video interviews simultaneously on audio equipment to be used for transcribing and as an archival back-up of the interview.

✓ Project planners usually choose to video record interviews when the physical environment illustrates important interview information, so be sure to video record the setting, including specific items or places, before or after the interview.

✓ Still photographs or three-dimensional objects that are to be documented as part of the video process should be propped up on a stand against a black background.

Remember that video interviews, just like their audio counterparts, are primary-source materials; they will not look like a scripted, polished documentary. Audio and video interview excerpts often are used effectively in documentaries and other productions, but the interviews themselves should be kept intact and handled as primary source material.

NOTES

1. David Kyvig and Myron Marty include several chapters of helpful, commonsense research guidelines in their book, Nearby History: Exploring the Past around You, 3rd ed. (Lanham, MD: AltaMira Press, 2010).

2. Pioneering oral historian Martha Ross was fond of telling students at the University of Maryland that initial contact with potential narrators always should be in writing. “Almost no one,” she would say, “is standing by their phone waiting to be asked to participate in an oral history interview.” So an out-
of-the-blue call is likely to be met with uncertainty and confusion—not an ideal way to begin an oral history relationship.

6. This form is adapted from oral history forms in Nancy MacKay, Mary Kay Quinlan, and Barbara W. Sommer, *Community Oral History Toolkit*, 5 volumes (Walnut Creek, CA: Left Coast Press, 2013).

7. The Pioneer Farms Oral History Project was conducted at the University of Nebraska–Lincoln in 2015 and 2016. Excerpts from the interviews were published in *Pioneer Farms: A Century of Change* (Lincoln, NE: Rural Futures Institute, 2017).
At last you’re ready to begin the interview, the most visible part of an oral history project. Good interviewing techniques are integral to its success. In this chapter we suggest a model for conducting an oral history interview. We will then review additional techniques that interviewers find useful and discuss special interviewing circumstances.

GETTING THE INTERVIEW UNDERWAY
After you have organized the interview setting, you will want to ask the narrator whether he or she has any questions before the interview begins.

THE INTERVIEW SETTING
Remember to keep the interview setting as comfortable as possible. This will help the narrator concentrate on the interview.

It is important to establish rapport with the narrator. A sense of trust between narrator and interviewer helps make a good interview.

Listen (and look) carefully for noise sources, such as ringing phones and chiming clocks, that will undermine the sound quality of the interview.

Take a little time with the narrator before beginning the interview to talk and relax.

Always be on time for an interview.

This is a good time to review the language in the donor form and to let the narrator know he or she will be asked to sign it as soon as the interview is over. Some interviewers also take this time to ask the narrator to fill out a biographical information form to keep a record of the person’s name, address, and other particulars. (A sample biographical information form is in appendix A.) After an equipment sound check, the interviewer will want to begin with a recorded introduction, such as: The following interview was conducted with [name of narrator] on behalf of the [name of organization] for the [name of project] Oral History Project. It took place on [date] at [place]. The interviewer is [name]. Additional descriptive information may be given but is not necessary. The introduction should be brief, to the point, and thorough. Adding too much information about the expected interview topics could give the impression that the interviewer is not interested in information on other topics that, when brought up, could lead to interesting, important, new, and pertinent information. A similar introduction should begin each subsequent recording used for the interview to avoid orphaned recordings whose identifying features are lost.

The interviewer should always record an introduction before starting the interview. It should include:

- name of narrator
- name of interviewer
- place of interview
- date of interview
- name of oral history project
- name of repository
- media or track number

This is usually done in the interview setting and is a signal to the narrator that the interview is ready to begin.

As a rule of thumb, the interview should unfold in chronological order and generally should be structured to elicit facts about the time, place, or event that is the focus of the interview as well as the narrator’s thoughts about and analysis of the facts. Even if an interview focuses on a specific subject or event, the
interviewer should begin with questions about personal background. This should be brief, but it is a good way to start virtually every interview because the questions are easy for the narrator to answer and it provides a context for evaluating subsequent information the narrator gives. Some interviewers have found that initial questions about a narrator’s work experience prove useful in getting a reticent narrator to relax, open up, and talk freely about past experiences.

After these background questions, move to the interview topics, beginning with when, how, and why the narrator initially became involved with the subject or event. This sets the stage for the narrator to tell the story from the beginning. Then move to questions about the subject or event. Prompted by open-ended questions, the narrator will talk about what happened, what he or she did or observed, and what others did. After listening to the narrator’s account, a thoroughly prepared interviewer will be able to explore the information further and attempt to clarify any apparent contradictions with other written or spoken accounts uncovered in the prior research. Exploring contradictions, not necessarily resolving them, is a key point of the interview. Our understanding of the past can be enriched by looking at events or actions from different perspectives. Narrators also will sometimes contradict themselves, and if they do, interviewers should strive for clarification by calling attention to the apparent contradictions. Sometimes it will turn out that a narrator simply misspoke. But in other cases, a narrator’s response can offer fascinating insights into how the person tries to reconstruct and make sense of the past—one of the multiple layers of meaning that can be embedded in an oral history interview.

Finally, ask the narrator to assess the experience or event. Why did things happen as they did? What did the narrator think about it then? What does he or she think about it now? Asking for the narrator’s analysis and reflections obtains insight into his or her thinking, another important aspect of oral history. Pragmatically, it also signals that the interview is winding down and provides for a graceful closing.

Interviewers working with one person on a series of life interviews will follow the same process of beginning with questions that are easy for the narrator to answer, then moving to the subject of the interview, and finally assessing the information as the interview winds down. Life interviews are often organized around specific periods in the person’s life. This structure gives each interview session a focus for both interviewer and narrator.

Oral history interviews generally last sixty to ninety minutes. An interview that goes on for two or more hours often ends with extreme narrator and interviewer fatigue. If you think you’ll need extensive information from one narrator, plan for more than one interview session. Keep track of the time during an interview, making sure not to tire out the narrator before covering key points. Judging how much time to spend on personal questions at the beginning and on questions that set up the body of the interview is the interviewer’s responsibility and should be carefully considered and thoughtfully addressed.

**INTERVIEWING TIPS**

*Use open-ended questions: “Tell me about . . .” “Describe . . .”*

*Don’t be judgmental or let your own opinions show. The interview is the narrator’s time to tell his or her story.*

*Use your background research to prompt the narrator as necessary. Reminders of names, dates, places, and events are helpful.*

*Ask about thoughts and feelings. It is the subjective information that helps make oral history such an interesting primary source.*

*Don’t interrupt the narrator. Wait until he or she is finished to ask another question.*

*Be prepared to ask follow-up questions to clarify information.*

*Don’t argue with the narrator’s information. If you doubt its accuracy, politely ask the narrator for greater elaboration. You may find the narrator’s story actually sets the written record straight.*

*Be thoroughly familiar with the research and the topics you intend to pursue. It breaks the rhythm of the interview to be constantly referring to the interview outline or to other notes.*

*Know how to operate the recording equipment. Practice repeatedly before the interview and always do a sound check before beginning.*

*Thank the narrator when finished. Follow this with a written thank-you letter.*
INTERVIEW GUIDELINES AND TECHNIQUES
Always keep the ethics of the situation in mind. An oral history interview is not a casual two-way conversation, a social call, or a heated debate over the interpretation of the past. Narrators are entitled to respect for their stories.

Rely on open-ended questions. They elicit the most information. Examples are “What were you told?” “How did you celebrate Christmas?” “Tell me about ...” “Describe ...” The importance of asking open-ended questions cannot be overemphasized. As Donald A. Ritchie points out in his book Doing Oral History, asking open-ended questions empowers narrators “to relate to and interpret their own stories... The interviewer may be asking the questions, but the interviewee is actively shaping the course of the interview rather than responding passively.” Open-ended questions enable the narrator to “to talk broadly, ranging as far and wide as possible,” volunteering whatever information they consider relevant to the topic at hand.4

Use neutral, not leading, questions. Asking the narrator “Why don’t you like living here?” will not result in as complete an answer as the more neutral question “Tell me about living here.” Questions beginning with how, what, when, why, where, and who are often used to introduce a subject or to follow up on an initial statement. They can help clarify an answer and can elicit further information. Some scholars have noted that within every question is hidden a clue to its answer, something oral historians need to keep in mind as they frame questions.5 An interviewer, for example, might be tempted to think that “How do you like living here?” is a more neutral version of “Why don’t you like living here?” It’s certainly less inflammatory, but still not as neutral as “Tell me about living here.”

Ask only one question at a time, not a smorgasbord of questions that will puzzle the narrator. If clarification is needed, make sure your elaboration does not lead the narrator to believe that you expect a particular type of answer.

Avoid the temptation to share your personal agreements or disagreements with the narrator’s views. Your opinions on the subject are not the focus of the interview. Some narrators, believing the purpose of the interview is an equal exchange of views like that encountered at a roundtable discussion or cocktail party, will try to draw an interviewer’s opinions into
the exchange. If that happens, an interviewer might satisfy the narrator’s curiosity by one of several neutral responses, like “I never thought of it that way” or “That’s very interesting” or “I can see your point.” But it may occasionally be necessary for the interviewer simply to explain forthrightly that the purpose of an oral history interview is to document the narrator’s views, not the interviewer’s.

Keep your focus on the narrator. Don’t show off your knowledge. Your background research is intended to help you draw out the narrator, but bragging about what you know is likely to have the opposite effect. Likewise, it’s never advisable to pretend to know more than you do. If a narrator says something you don’t understand, despite your background research, always follow up by asking for clarification or more details.

Listen carefully without interrupting the narrator. The goal in an oral history interview is to collect in-depth answers by posing focused, clearly stated, open-ended, neutral questions.

If the narrator insists on telling a rehearsed story, listen politely and let him or her finish. Then go back and ask additional questions, focusing, for example, on specific details that will get the narrator to go beyond the rehearsed performance.

Concentrate on what the narrator is saying. Take notes and wait until he or she has finished speaking. Then ask follow-up questions for clarification or to develop new information that did not emerge in the research process.

Watch for hints, such as pauses or slight changes in voice, that indicate the narrator may have additional thoughts or feelings to describe, and ask respectful follow-up questions. Sometimes narrators may indicate their feelings about subjects being discussed through body language. These are nonverbal responses to questions, such as pointing a finger, leaning toward the interviewer, leaning away from the interviewer, crossing the arms and legs, shifting or moving noticeably, breaking eye contact, and talking slower or faster than normal. You will want to be aware of these clues and respond to them as necessary. It is sometimes helpful to respectfully mention a nonverbal response and ask the narrator to discuss his or her feelings in more depth.

Use information identified through background and narrator-specific research to help facilitate a smooth interview. This may be as simple as supplying the correct date for an event or the name of someone connected with the event. Providing such information saves the narrator the frustration of trying to remember specifics or the possible embarrassment of giving incorrect information. It also indicates the project is important enough to have interviewers who are thoroughly prepared.

It helps to ask the narrator to put an event or memory into the context of time and place as much as possible. This may be done by encouraging the narrator to think in terms of people and places that have ties to the interview topics. For example, one narrator, when asked to think about a specific subject in this way, closed his eyes and asked the interviewer what year he should put himself back to. This helped him put the memory into context. Another technique is to ask the narrator to describe what a place or event from the past looked like. For people with keen visual memories, this can be an important memory-jogging technique. Use the list of names and dates as necessary to help the narrator put events in context.

Photographs, maps, drawings, and three-dimensional objects are useful aids, although careful verbal descriptions of each will have to be given in audio interviews. The interviewer might say, for example, “So in this photo Great Uncle Joe is the second from the left wearing a bowler hat.” In a video recorded interview, if a narrator has photographs or other objects pertinent to the interview, the videographer may be asked to film the materials while the narrator describes each of them.

Remember to ask for specifics of place names, names of people, and dates or context. Sometimes the narrator’s story is so interesting you can forget to ask for these details.

Try to establish where the narrator was and what his or her connection to the story was at each major point. This will help differentiate firsthand information from accounts given by others.

Avoid asking questions beyond the narrator’s expertise or about things he or she will not know firsthand. Narrators should not be made to feel they’re being put on the spot or expected to talk about matters beyond their knowledge.

When a narrator uses acronyms or jargon that the general public is unfamiliar with, ask for explanations, descriptions, spellings, or translations, as appropriate. Your research or specific knowledge may mean you understand what the narrator is saying, but others listening to the interview or reading the transcript may not share this knowledge. This can be especially important with military or other government jargon and acronyms that fall into disuse and whose translations can be difficult to recover.
Use body language and eye contact to encourage the narrator’s responses. Smiles and nods are often effective. Silence—even uncomfortable silence—is also an effective tool for eliciting information. When the narrator finishes responding to a question, resist the temptation to jump right in with a follow-up or a new topic. Some narrators need a few moments to continue gathering their thoughts. Additionally, a natural tendency to want to fill silences in conversation may induce the narrator to add something more without verbal prompting. Repeated verbal encouragement by the interviewer, such as “uh-huh,” is intrusive and lowers the sound quality of the interview.

Discourage requests to turn off the recorder. Only information given during the recorded interview will become part of the historical record. If a narrator asks you to stop the recorder, it helps to see whether you can determine what concerns the narrator may have that affect his or her willingness to speak on the record. But if the narrator requests repeated breaks in the recording, you might need to consider whether he or she is having second thoughts about participating in the project. Halting the interview for further discussions or clarifications with the narrator about options for closing the interview transcript might be useful. You will have to be prepared to make these decisions on the spot. Oral historian Donald A. Ritchie has suggested that if a narrator specifically refuses to discuss particular topics, that should be noted in the interview files.

Take breaks. This can be done when changing recording media. Allow time to stretch, leave the room, get a drink of water, or quickly review the topics to be covered in the next part of the interview coming up. If a narrator becomes too tired to continue effectively, determine whether you can return for another interview session at a different time. Be sensitive to such situations and handle them graciously.

Use a notebook to keep track of follow-up questions, additional points to make, or other interview needs. This will help keep you organized and will allow you to continue to concentrate on the narrator.

Also use your notebook to keep a running list of proper names mentioned in the interview. It is a good idea to ask the narrator to review this list and correct any spelling errors at the end of the interview. But always double check spellings if possible. Sometimes interviewers won’t know for sure whether Aunt Ann spelled her name with or without an “e.” The list of proper names should be kept in the master file, with a copy given to the processor.

Keep track of the time. Make sure you don’t extend the interview past a reasonable limit.

Immediately label all the recording media. Include the oral history project name, the name of the narrator, the name of the interviewer, the date, and (if appropriate) the media number (for example, “1 of 3 generated in the interview”).

Take a photograph of the narrator in the interview setting. This should be done for both audio and video interviews.

Sign the donor form with the narrator. This should be done even if you plan more sessions with him or her.

TROUBLESHOOTING THE ORAL HISTORY INTERVIEW

Narrators sometimes will not immediately give long answers to questions. In such cases, it helps to wait before asking the next question, making sure they are not considering an additional comment. If nothing is forthcoming, it may be that the narrator is not interested in or comfortable with the question, and you might try switching to a different topic or approach. It also may be that the narrator isn’t sure what kind of additional information you might find interesting, in which case a follow-up question might open the floodgates.

As the interview progresses, the narrator, understanding the direction of the questions, may anticipate several points on the interview guide and cover them with one answer. You will want to be prepared with follow-up questions if necessary. Or, if the information is complete, move to another subject.

Some people habitually answer with short sentences or one or two words. Try to ask questions that elicit as much information as possible, but remember that each narrator is unique and treat the situation respectfully. Verbally interpret nonverbal responses, especially in audio interviews. A brief “I see that you nodded yes to my question” will help clarify the situation.

By contrast, some narrators talk a great deal. A good interviewer is prepared to keep the interview focused on the topics at hand in a polite and gentle manner. Although it is generally better to avoid unnecessarily interrupting, interviewers should be prepared to ask a question at an appropriate moment, such as when the narrator changes the subject.

At times, an interviewer may arrive as scheduled only to discover that the narrator has changed his or her mind about participating for any of a variety of
reasons—the narrator’s health is not good, the time scheduled for the interview is not good, the narrator is unexpectedly busy, the health of family members is not good, and the like. Interviewers should remain flexible, review the situation, and come up with a solution, which may simply mean rescheduling the interview.

Narrators also might be unwilling to be interviewed for a variety of other reasons. The topics to be covered, while important to the project, may be irritating or difficult for the narrator to discuss. In some cases, talking about past events or people to whom the narrator was close can bring about emotional reactions. Be prepared for these eventualities. Oral history interviews, while sometimes difficult, offer the narrator a chance to tell fully his or her story and to contribute information about people important to him or her. Often, allowing the narrator a moment of silence or sadness before moving on to happier memories allows you to complete the interview successfully.

ENDING THE INTERVIEW
Ending an interview is an art in itself. Oral history interviews are intense and can involve revelation of extremely personal information. To help the narrator wind down, the interviewer might ask a few introspective questions while giving the narrator an opportunity to add any thoughts or information that might not have been covered elsewhere. Be sure to thank the narrator before the recorder is turned off.

After signing the donor form, which should be done after every interview session, the interviewer may want to sit and talk for a little while to help the narrator unwind. This often depends on how tired the narrator is and the interviewer’s schedule. This is the time to ask the narrator exactly how to record his or her name on project files. Sometimes this is the time for the coffee or tea you couldn’t accept during the interview. A measured packing up of interview equipment also allows for after-interview comments and discussion. Another good end-of-interview activity is to review the spelling of proper names jotted down during the interview. While a good exercise for interviewer and narrator, it also provides helpful information for people processing the interview. If this isn’t done at the end of the interview, you will want to call the narrator as soon as possible to review and check this information.

Narrators often have photos, other archival material, or artifacts related to the information discussed.
If so, they may want either to give the items to the repository holding the oral history project or to loan them for copying (especially in the case of photographs or historic documents). If project planning calls for taking this information at the time of the interview, carefully inventory all materials, signing and giving one copy of the inventory to the narrator while keeping the other with interview records. If the materials are to be identified for future consideration, the interviewer will still want to look them over and write a description for project coordinators. See appendix A for sample inventory forms.

Sometimes, during discussions after the interview, a narrator remembers something pertinent to the interview. If possible, you should try to record this information, even if it means unpacking the recorder and setting it up again. As an alternative, you can take thorough notes and ask the narrator to schedule another interview session.

Finally, be prepared to answer any additional questions the narrator might have about the project repository, accessibility, and future use of the interview, even though a complete review of those matters should already have taken place. If full transcription is to be done, let the narrator know he or she will receive a copy to review and correct before it is put into final form. It is also a good idea to offer the narrator a personal copy of the interview media and a copy or copies of the transcribed interview, explaining when they will be sent.

**SPECIAL INTERVIEWING CONSIDERATIONS**

**Video Interviews**

The techniques and guidelines listed above apply to all oral history interviews, whether they are audio or video recorded. But video interviewers should keep in mind the special points related to the physical set-up, as outlined in chapter 6, as well as these additional considerations.

Remember that a video recorded oral history interview is not a polished documentary program ready for use on television or online. It is a video version of an audio interview. As such, its focus is on collecting the information as the narrator tells it. Although the video adds a more formal touch to the process and allows for documenting visual aspects of the narrator’s information, narrator and interviewer should not feel constrained by the presence of the camera. The narrator should be free to start and stop talking in a relaxed manner, including false starts. Do not abandon the use of silences or pauses, though they are more noticeable because of the camera.

More time constraints can affect the use of video compared to audio if recording is done in a studio or on location. It can be easier for the audio interviewer to go a little beyond the allotted one or one-and-a-half hours if the situation calls for it, while camera and studio time are usually rented by the hour and may be tightly scheduled. Because of this, the interviewer should keep an even closer eye on the time during a video interview, making sure to cover the most important or critical information the narrator is in a position to provide. Video interviews conducted outside a studio may allow the same flexibility as an audio-only interview.

**Long-Distance Interviews**

You may find you need to conduct an interview by telephone or by using software applications for internet voice and video calls. This should be done with care and planning, and only if necessary. Time restrictions in a telephone interview can result in forcing it to move at too fast a pace, and it is much more difficult for most people to develop personal rapport over the telephone than face to face. Telephone interviews may suffer from the interviewer’s inability to read body language and verbal cues, like sarcasm or facetiousness, all of which may affect understanding of the narrator’s meaning. Interviews conducted via Skype or similar services can add the face-to-face element lacking in a telephone interview, but audio and visual quality may sometimes be impaired and connections can sometimes be lost, adding more challenges to the interview process.

Nonetheless, recording a long-distance interview with a narrator who has unique information to contribute to an oral history project is far better than not interviewing the person at all. Sometimes limited funds prevent traveling to a narrator’s location, or a narrator’s infirmity or other considerations may make a face-to-face interview impossible to arrange. If that’s the case, and you must interview remotely, it’s a good idea to practice with your equipment in a trial run to be sure the connections will result in an appropriate quality voice recording. One positive aspect of a long-distance interview may be that the interviewer will feel less constrained about taking notes to keep track of follow-up questions and the like, for the note-taking is unlikely to be a distraction the way it might be in person.
Email Interviews

We have just one recommendation about the advisability of conducting email interviews: Don’t. An email exchange is, by definition, not an oral history interview. It is a more formal, written exchange of information, even more impersonal than a telephone interview. Sending written questions and reading written responses incorporates none of the spontaneity of a spoken exchange and involves no opportunity for the interviewer to take nonverbal cues from the narrator. Moreover, the interviewer cannot even be certain who is providing the answers to the questions.

Having said that, however, one striking exception to this advice is worth noting. Interviewer Esther Ehrlich and playwright and performance artist Neil Marcus created a remarkable interview for the Artists with Disabilities Oral History Project at the University of California, Berkeley, Regional Oral History Office, communicating by voice, computer instant messaging, and gestures. Marcus was a child when he was diagnosed with dystonia, a severe neurological disorder that makes it difficult for him to speak and to control his body. To conduct the interview, two computers were set up side by side so that Marcus could type responses to Ehrlich’s questions, in addition to offering verbal responses from time to time. The interview sessions (six in all, totaling sixteen hours) were also videotaped. The critical point here is that Ehrlich and Marcus were engaged in a face-to-face exchange, a defining element of oral history. Use of the computer, as well as their voices, was simply the medium that made the process work, just as sign language may be the appropriate medium in an oral history interview with a deaf or hearing-impaired narrator.

In the absence of such unique circumstances, don’t entertain the fiction that an email exchange is an oral history interview. It may be an exchange of information, even historical information, but it is not oral history. If for any reason information gathered from someone in this way is included in an oral history collection, its origins should be clearly defined and explained.

Interviews with Multiple Narrators

It is usually best to interview one person at a time and to have as few people in the room as possible during the process. An interview is an intense situation because of the degree of concentration required by both the interviewer and the narrator, and narrators tend to be more comfortable with fewer people around, although some cultures may require or encourage witnesses or observers. Sometimes oral history interviews may require the presence of an interpreter if the narrator and interviewer do not share the same language. But in such cases, while multiple people may be present, the focus is still on gathering information from just one narrator.

If you are interested in interviewing several people together, you will want to consider using video. Think carefully, however, about what this interview will produce. Despite the ideal give and take that having several people in a group seems to offer, what generally happens is that one person dominates or the narrators contradict one another enough to bog down the interview. Sometimes, even if people disagree with one another, they won’t say so for fear of offending or being ridiculed by the more outspoken members of the group. It takes an experienced interviewer to keep an interview with multiple narrators moving along effectively.

The exchanges in a multiperson interview can, however, illuminate the narrators’ process of remembering, which, in itself, can yield important insights. For example, interviewers sometimes will encounter situations in which husbands and wives have assumed that both partners are expected to participate in a scheduled oral history interview. While the phenomenon of one person dominating the interview may well result, it is also possible that the couple may help each other remember details or spark responses that otherwise would not have occurred.

If interviewing several people together is necessary because of time or other constraints, it is critically important for the interviewer to establish some method of carefully tracking who is speaking if the interview is not video recorded. Many voices sound similar when recorded, and without a running list of the order in which people spoke or a rule that everyone introduces himself or herself when beginning to talk, a person trying to transcribe such a multivoice interview session will become hopelessly lost.

Getting groups together and recording their conversations, prompted by an interviewer or group leader, has enjoyed a certain popularity at gatherings such as college reunions and other similar events. But these might more accurately be called recorded group discussions, not oral history interviews, unless the session has some planned, research-based structure, the participants all sign donor forms, and the recording is processed and archived in such a way that the information is available to others.
Traumatic Event Interviewing

Natural disasters like hurricanes, wildfires, and floods as well as man-made tragedies like the September 11, 2001, attacks on the Pentagon and World Trade Center, the internment of Japanese Americans during World War II, and the Holocaust have focused attention on the unique needs of those interested in conducting oral history interviews related to long ago or recent traumatic events. Indeed, the Oral History Association recognized growing interest among oral historians whose efforts focus on interviewing in the wake of natural and man-made disasters by establishing an Emerging Crises Oral History Research Fund. Since 2006, scholars have received financial support from the fund to document experiences of migrant women workers in China, participants in the Arab Spring uprisings, people involved in movements to end police brutality, West Virginians affected by a disastrous chemical spill, and climate refugees displaced by rising sea levels, among other emerging crises. Such oral history projects should be approached carefully, with sufficient training for interviewers who may be dealing with emotionally fragile people. A narrator grieving over the loss of a family pet in a natural disaster would not, for example, want to hear an interviewer say that she can always get a new parakeet. Nor would it likely be comforting for a narrator to hear an interviewer say, "I know just how you feel."

People who agree to be interviewed in the wake of a personal or public tragedy may instinctively perceive that there is a therapeutic value for them in talking about their experiences, and many consider it constructive rather than distressing to do so. And while it is not uncommon for narrators to express relief after recounting a troubling or emotional episode, some oral historians have noted that emotions related to an interview can be wide ranging and change over time, making it all but impossible to determine what emotional benefits (if any) may be associated with oral history interviews. In any case, oral historians generally are not trained as grief counselors or therapists, nor are they social workers who can offer to help people put their lives back together. So appropriate backgrounding is a must, as well as appropriate support for interviewers who themselves may experience grief from interviewing the grief stricken. Projects that emerge in the immediate aftermath of a tragedy often bear a closer resemblance to journalism than oral history. But unlike journalistic interviews, which are often ephemeral and conducted for immediate publication, oral history interviews of trauma survivors, like the hundreds of interviews conducted by oral historians from Columbia University after the September 11 terrorist attacks or the interviews created in emerging crises, can become a treasure trove of information that scholars and others will continue to find invaluable, particularly if the context in which the interviews are created is thoroughly documented for future users of the material.

While some oral history projects intentionally set out to document the experiences of people affected by a disaster, it is important to note that not all narrators may consider themselves victims, regardless of how outsiders may wish to portray them. Moreover, oral history interviewers in projects unrelated to public disasters can unexpectedly encounter narrators who are suffering from private traumas, sometimes decades old, like people who overmortgaged a family farm and then lost it in the economic turmoil of the 1980s. The emotions of such narrators, while related to personal or family tragedies, are no less real than those of survivors of high-profile public tragedies. Oral history interviewers sometimes encounter such situations and need to be prepared to respond appropriately.

Cross-Cultural Interviewing

The 1970 U.S. Census found that a record low 4.7 percent of the nation’s population were foreign born, down from a record high of 14.8 percent foreign born in 1890. (The decennial census began collecting place-of-birth data in 1850.) Between 1970 and the 2010 census, the proportion of foreign born had mushroomed to 12.9 percent. Moreover, about 48 percent of the nation’s foreign-born population over the age of five spoke a language other than English at home. The demographic changes by state are dramatic. In 1970, only ten states had a foreign-born population exceeding 5 percent. By 2010, nineteen states still had a foreign-born population of less than 5 percent, but foreign-born residents exceeded 15 percent of the population in eight states, with California having the nation’s highest proportion at 27.2 percent foreign born.

It is no wonder, then, that scholars and community historians have increasingly begun to examine the growing multicultural population and to document the experiences of diverse communities. In fact, James E. Fogerty, formerly of the Minnesota Historical Society, has noted that if future scholars want reliable information beyond census data on the Hispanic, Asian Indian, Hmong, Cambodian, Somali, or Bosnian communities that are growing segments of that...
state's population, they "must employ oral history as a documentary tool of major importance."\(^1\)

For oral historians, multicultural projects raise important issues at all stages, from project planning and development through processing of oral history materials.\(^2\)

Language barriers, for example, may pose the first challenge. If the project is initiated by a predominantly English-speaking group, how will representatives most effectively obtain the cooperation and participation of non-English-speaking members of the community? Ethnographer Michael H. Agar talks about connecting with official or unofficial "stranger-handlers," who can introduce outsiders to a group and serve as an informal intermediary to build relationships between the stranger and the group members, a concept oral history project planners might find useful.\(^3\)

Beyond the planning process, language issues also need to be considered in writing donor forms, ensuring complete explanation of the project to potential narrators, conducting the interviews, and processing all the interview materials. Will the project hire translators? Work with volunteers? Family members? Is it appropriate to use family members? If the translators are not professional translators, what kind of training is necessary to ensure that they understand that the interviewer wants to know exactly what the narrator said, unedited by the translator? Is it even appropriate for outsiders—the people Agar calls "professional strangers"—to be involved?\(^4\)

Possible language barriers are just one element of the large array of cultural differences that a multicultural oral history project may encounter. Making sure project participants are aware of such differences is an important part of the training process. How—or whether—people shake hands, how close they stand to another person, whether or how they make eye contact, how they use gestures, whether they touch other people, how they treat silences in conversation, whether an exchange of token gifts is expected, and even how they smile or laugh are all aspects of non-verbal communication that can vary from culture to culture and within a culture. And if the meaning of such behavior is not understood—or is incorrectly assumed to be universal—oral history interviews could turn disastrous.

One possible solution is to find people in the communities in which you wish to conduct oral history work who are willing to teach you what you need to know to work effectively toward a common goal. Cultural differences aside, sincere interest and mutual respect go a long way toward overcoming barriers to interpersonal communications.

In some settings, however, cross-cultural communications may be further complicated by the fundamental nature of the project at hand and the political climate in which it takes place. Erin Jessee, oral historian and genocide scholar at the University of Glasgow, for example, recounted working with Rwandans reluctant to speak candidly "lest they betray experiences or opinions that are deemed inappropriate by the current government." According to Jessee, "Rwandans often find it amusing to watch foreign researchers struggle through interviews, not realizing that the answers they're eliciting are carefully scripted to reflect the dominant official narrative." Foreign scholars working in Rwanda may perceive that Rwandans have a reputation for lying. But in reality, "Speaking your mind in a manner that the government finds provocative can result in a vast range of social, economic, and political harms for the speaker and his or her family."\(^5\)

The challenges associated with planning and carrying out a cross-cultural oral history project are not new. The Depression-era Federal Writers Project, while not a true oral history project by contemporary standards, generated some 2,300 interviews with former slaves that mainly focused on black folklore and songs but that also included historical questions largely dealing with the narrators' day-to-day lives. Some of the interviewers were black, but many were not, and because whites in the 1930s South widely considered African Americans inferior, the race of the interviewer was part of the unspoken communication underlying all of the interviews.\(^6\)

Some studies of the interviews (the accounts of which are largely based on interviewer notes, not recordings) offer revealing insights into the effect of the unequal power relationships between interviewer and narrator. Some former slaves were quite open about the fact that they weren't being candid in their remarks, as in this excerpt: "Oh, I know your father en your grandfather en all of dem. Bless Mercy, child, I don't want to tell you nothin' but what to please you."\(^7\) Some of the former slaves assumed that their white interviewers were connected with the local welfare office, which suggests they were likely to try to ingratiate themselves with the interviewers in hope of receiving assistance. Scholars who have studied the former-slave interviews have been able to identify at least one elderly woman who was interviewed by two different people—one a white woman

86  CHAPTER 7
and the other a black man. The interviewers’ versions offer strikingly different accounts of family relationships, white paternalism, and treatment by white slave owners. The differences in the two interviews, in fact, provide as much information about the nature of the relationship between the interviewers and narrator as they do about the details of the former slave’s life.

The United States has a centuries-old history of black people and white people being unable to interact with each other with openness and candor, which is clear in the Depression-era interviews. That history can pose a challenge for contemporary oral historians, too, as they embark on multicultural projects.

Here’s how one such situation unfolded: A young white woman in a small midwestern city eagerly sought to interview an elderly black woman, the granddaughter of slaves, as part of a fledgling community African American history project. The interviewer and narrator were acquainted with one another, but the first time they recorded a formal oral history interview, it became clear that topics having to do with racial issues were difficult for them to discuss. When telling a story about her grandmother’s childhood, for example, the elderly woman said, “Well, I’ll skip that.” Likewise, the interviewer passed up opportunities to ask follow-up questions about the elderly woman’s schooling, jobs, relationships with young people of other races, episodes in the community involving the Ku Klux Klan, and so forth.

After critiquing the first interview, the young interviewer came to terms with her own discomfort in talking about race with an elderly woman whom she deeply respected. She wrote an introduction to the next interview and recorded it at the beginning of their next session, in which she stressed the unique contribution the elderly woman could make by being willing and able to tell about what it was like to be a young African American girl growing up in this small midwestern city in the early 1900s. The community and the state, the interviewer said, were “extremely lucky to be able to listen to you and have a record of this part of the state’s history, which was entrenched with institutional racism. You can teach us what it was like, and we can put together a document for others to learn from and gain a better understanding of what it was like for you to grow up here.”

Then she described frankly, on the record, the differences between them and the impact that might have on their interview:

It is hard to talk about racial issues sometimes. It may be difficult for me to ask you certain questions, and difficult for you to answer, but I hope we can try. It may be easier for you to talk about the racism you encountered or observed with another African American woman. I can try to set that up . . . but right now I am available and would like to see what you and I can accomplish. A few positive things you and I have together is that we know each other, trust each other, and respect each other. We are both women that like to talk about our lives, and we are friends.

The result? Greater candor by the elderly narrator about subtle and overt forms of racism in the community and more willingness by the interviewer to ask questions about a concealed past.

This episode also serves to illustrate that oral history is not a natural science. It is an intense interaction between two specific people. And those people can never stop being who they are—men or women, black or white, young or old. At one level, every interview is a cross-cultural interview because racial, nationality, or ethnic differences are not the only forms of cultural identity, in its broadest sense. People also make distinctions among one another based on age, socioeconomic level, job status, educational background, religion, political affiliations, family connections, gender identity, and other such characteristics. Thus each combination of narrator and interviewer results in a unique oral history interview. And that’s why it’s important to document fully all the variables that might affect future users’ interpretations of the interview.

Project coordinators should try to pair narrators with interviewers to whom they likely will respond best. Is a twenty-something with body piercings and tattoos likely to be the most effective interviewer for a demure octogenarian narrator? Will an interviewer who happens to be an employee of the narrator’s business be able to ask probing questions? Will a high school dropout be too intimidated to interview a college professor? Will a college professor be too arrogant to interview a high school dropout? Will a priest be able to interview a rabbi? How about the other way around? Sometimes people’s differences can spark lively, informative interviews, while an oral history interview between two old friends often results in an exchange of insider information that others may not understand. Are there any absolutes in this process? No. Interviewers need to be able to approach their narrators with good preparation and a sense of respect for the gift narrators are giving to an oral history project.

The Interview
WRAPING IT UP

Narrator and interviewer must sign the donor form after all interviews, regardless of whether they are in audio (including telephone) or video format. As stated in chapter 4, federal copyright law specifies that the words on the recording are protected by copyright and may not be used without the person’s permission.

Send a thank-you letter to the narrator as soon as possible after the interview. It should thank the person for his or her time and reinforce the importance of the information given. See the sample in appendix A.

Although there is no substitute for thorough research and careful preparation before conducting oral history interviews, we offer this caveat: be prepared to be flexible.

Retired Arlington County, Virginia, librarian Sara Collins recalled an occasion when an elderly woman came to Arlington on a "last" trip to her hometown and wanted to visit the school she had attended from 1913 to 1915. Collins opened the building, which had since become the Arlington Historical Museum, and an interviewer from the library's oral history program rushed over, recorder in hand. The result was a priceless account of the woman's school days, in which she recalled the arrangement of classrooms, described the daily routine of fetching coal and water, and talked about teachers and classmates she remembered. Flexibility and an experienced interviewer combined with a willing, articulate narrator to capture an unplanned firsthand account of a long-ago era.

Oral history interviews are as unique as the people who give them. Interviewing techniques and narrator responses may vary, but a well-prepared interviewer can elicit from a willing narrator much information important to the overall project. It is not always easy. The interview can be an intense experience for both interviewer and narrator, but the results are well worth the effort.

NOTES
1. Australian Oral historian Katie Holmes has observed that in life history interviews in particular, narrators "rarely tell their life story in purely chronological form. They often revisit episodes previously discussed, circling back to add further information and detail either as they recall them or on closer questioning from the interviewer." While not essential to the chronology of a person’s life, returning to a previously discussed point “helps communicate a sense of self and the meaning of the event.” See Katie Holmes, "Does It Matter If She Cried? Recording Emotion and the Australian Generations Oral History Project," Oral History Review 44 (Winter/Spring 2017): 68.

2. Some oral historians suggest that interviewers are sometimes too reluctant to engage with their narrators or challenge narrators’ assertions, resulting in a “deferential politeness” rather than a lively and informative dialogue. See Linda Shopes, "Insights and Oversights: Reflections on the Documentary Tradition and the Theoretical Turn in Oral History," Oral History Review 41 (Summer/Fall 2014): 265.

3. The above description of a model interview format is based on the teaching of pioneering oral historian Martha Ross, a past president of the Oral History Association.


5. Alice Hoffman, retired labor historian and a past president of the Oral History Association, made this point in response to a panel discussion at the 2006 OHA conference in Little Rock, Arkansas, noting that "within every specific question is hidden its answer."

6. Canadian oral historian Alexander Freund has raised ethical questions about how interviewers can manipulate narrators by the use of silence, inducing them to divulge information they never intended to share, in the inherently unequal power relationship of an interview setting. Freund suggests that oral historians should explore how oral history practice fits into a larger social and cultural context, including the centuries-long practice of asking people about themselves, from the evolution of confession in the Roman Catholic tradition to the rise of psychoanalysis and the contemporary “mass culture of confession” promulgated by celebrities like Oprah Winfrey and the explosion of personal story sharing on social media. See Alexander Freund, “Confessing Animals: Toward a Longue Durée History of the Oral History Interview,” Oral History Review 41 (Winter/Spring 2014): 18–26.


11. Debates over the proper role for institutional review boards in regulating social science research have reflected concerns that asking people who are victims of trauma to participate in interviews about their experiences may have the effect of retraumatizing them. But considerable research in psychology, psychiatry, and memory studies casts doubt on the notion that such interviews have such an effect on narrators. Likewise, there is scant evidence that participating in interviews is inherently beneficial to narrators. See


15. James E. Fogerty, “Oral History as a Tool in Archival Development,” CITRA (International Conference of the Round Table on Archives)-Reykjavik, 2001, Abstracts, at http://old.ica.org/citra/reykjavik_eng/abstracts/fogerty.rtf, accessed September 25, 2008. Fogerty also notes that, in addition to its value in documenting immigrant populations, oral history is increasingly important as a documentation tool in general because of “the decreasing percentage of substantive information contained in records—both paper and electronic.”

16. Scholarly literature abounds in fields such as cross-cultural communication, conflict resolution, and ethnography, among others, which oral history project planners may find useful if they embark on a multicultural project.


23. Davidson and Lytle, After the Fact, 185.

24. Oral history pioneer Martha Ross was fond of advising students at the University of Maryland that one would usually get a more informative interview if a grandchild interviewed a grandparent rather than having the son or daughter—the middle generation—conduct the interview, because a grandchild and grandparent “share a common adversary.”
SAMPLE LETTER OF AGREEMENT, INTERVIEWER

Note: This form could be used for paid and volunteer interviewers.

I, _____________________________________________, interviewer for the _________________________ Oral History Project, understand and agree to the following statements:

• I understand the goals and purposes of this project and understand I am representing the _____________ (project sponsor) when I am conducting an interview;
• I have participated in oral history training sessions and am familiar with the recording equipment;
• I understand the legal and ethical considerations regarding the interviews and will communicate them to and carry them out with each narrator I interview;
• I am willing to do the necessary preparation, including background research, for each interview I conduct;
• I will treat each narrator with respect, and I understand that each interview will be conducted in a spirit of openness that will allow the narrator to answer all questions as fully and freely as he or she wishes;
• I am aware of the need for confidentiality of interview content until such time as the interviews are released for public use per the repository’s guidelines, and I will not exploit the narrator’s story;
• I understand my responsibilities regarding any archival materials or artifacts that the narrator may want to include in the interview process; and
• I agree to turn all interview materials over to the repository in a timely manner and to help facilitate all necessary processing steps.

______________________________________________________________________________
(Interviewer)

Date

______________________________________________________________________________
(Project Director)

Date