



Oral History Toolkit Utah Historical Society

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

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About This Toolkit

This toolkit offers guidance and resources to help you successfully complete an oral history. It includes oral history best practices, interview preparation, interview tips, transcription, and more. As a reminder, this toolkit is not a one-size-fits-all but rather one of many resources available to aid your oral history work. Please refer to the **Resources** to find additional books and websites on oral history.

Acknowledgments

The information in this toolkit comes from numerous oral history resources, including Utah oral historians and scholars, oral history publications, and scholarly websites. These resources include Randy Williams, oral historian and Utah State University emeritus folklorist; Jed Rogers, University of Utah Press acquisitions manager and public historian; Megan van Frank, director of the Center for Community Heritage with Utah Humanities; Utah Humanities; StoryCorps; Smithsonian Institution Archives; and the Oral History Association. Many of the sections in this toolkit derive from past oral history training documents created by the Utah Historical Society and Utah Humanities.

The Peoples of Utah Revisited Initiative

The *Peoples of Utah Revisited* is an agency-wide initiative that seeks to widen the lens on Utah's history and tell the stories of our distinct and intertwined histories. Partnering with communities and scholars, the Utah Historical Society seeks to create a deeper understanding of our shared history by shining a light on Utah's rich array of cultures, traditions, and experiences.

Through oral history work, we can create a deeper understanding of our history by highlighting new stories and obtaining personal and in-depth knowledge of Utah's history. Oral history interviews and transcripts created through the *Peoples of Utah Revisited* initiative will become part of the Utah Historical Society's online collection. The materials in this collection will be freely available for present and future generations to learn about Utah's multifaceted communities.

Introduction to Oral History

Oral history is an essential tool – alongside historical research, analysis, and writing – used to understand the past. It offers an intimate link between past and present in ways that other sources are unable to do. Oral history also allows for a wider view on history, as it provides firsthand experiences and new insights into historical events, places, and cultures. Whether used for scholarly research, preserving community stories, or fleshing out one's family history, oral history provides unique access to stories not otherwise known or in danger of being lost.

Oral histories versus oral traditions: What is the difference?

- Oral traditions: Stories and history passed down verbally between generations. For many Indigenous peoples, including Native Hawaiians, Alaskans, and Pacific Islanders, oral tradition is a primary way of preserving and communicating tribal histories.
- Oral history: A method of gathering historical research through a recorded interview, usually one-on-one, based on asking questions to uncover personal accounts of historical events and experiences. The recorded interview is preserved as a historical record along with a transcription of the digital recording. This method allows the interview to be preserved and researchable to provide new insight into historical accounts.

In short, oral history is:

- A research method that involves in-depth interviewing
- A recorded memoir
- A typewritten transcript

Why We Collect Oral Histories

- To gain information and knowledge about a person, place, event, or time that is not available in other sources.
- To bring uniqueness to history.
- To interact with others through listening and respecting their history.
- To give voice to people who otherwise would go unheard.
- To validate the lives of others.
- To build community and create partnerships with historical stakeholders.

- To provide an understandable and very human link for young people and newcomers to a community to the immediate present or recent past.
- To have fun – interviewer, narrator, and others!

Oral History: General Principles and Standards

Below are some general principles and standards of oral history, derived from the Oral History Association. These steps are important to follow to ensure your oral history work is accurate and complete. More information about oral history principles and standards can be found at: <http://www.oralhistory.org/do-oral-history/principles-and-practices/>.

- Oral history is distinguished from other forms of interviews by its content and extent.
- Oral history interviews are historical documents that are preserved and made accessible to future researchers and members of the public.
- For long-term preservation and access, oral historians should use the best recording equipment available within their financial limits.
- Oral historians inform narrators about the nature and purpose of oral history interviewing in general and of their interview specifically.
- Because of the importance of context and identity in shaping the content of an oral history narrative, narrators should be identified by name. There may be some exceptional circumstances when anonymity is appropriate, and this should be negotiated in advance with the narrator as part of the informed consent process.
- Narrators must be informed that they will be asked to sign a legal release. Their interviews must remain confidential until they have given permission for their use. Narrators hold copyright to their interviews until and unless they transfer those rights to an individual or institution via release form.
- Interviewers should avoid making promises that cannot be kept.
- Interviewers should guard against possible exploitation of interviewees and be sensitive to the ways in which their interviews might be used.
- Interviewers should avoid stereotypes, misrepresentations, and manipulations of the narrator's words. This includes foremost striving to retain the integrity of the narrator's perspective, recognizing the subjectivity of the interview, and

interpreting and contextualizing the narrative according to the professional standards of the applicable scholarly disciplines.

- Narrators must be informed of the purposes and procedures of oral history, as well as the aims and anticipated uses of the projects to which they are contributing (including how the information will be edited and disseminated).
- Interviewers must respect the rights of narrators to refuse to discuss certain subjects, to restrict access to the interview, or, under appropriate circumstances, to choose anonymity.
- Interviewers should work to achieve a balance between the objectives of the project and the perspectives of the interviewees, and should be sensitive to the diversity of social and cultural experiences and to the implications of race, gender, class, ethnicity, age, religion, and sexual orientation.
- Interviewers should encourage interviewees to respond in their own style and language and to address issues that reflect their concerns.
- Interviewers have a responsibility to maintain the highest ethical standards in the conduct of their work and to align with the best practices of oral history work.
- In recognition of the importance of oral history to an understanding of the past and of the investment and effort involved, interviewers and interviewees should mutually strive to record candid information of lasting value and to make that information accessible.
- Interviewers must respect the narrators, their experiences and perspectives, and the integrity of the research. All those who use oral history interviews should strive for intellectual honesty and the best application of the skills of their discipline.

Oral History Terminology

- Oral history: A field of study and method of gathering, preserving, and interpreting the voices and memories of people, communities, and participants of past events. The oral history interview is preserved in a digital recording and a written transcription for research purposes.
- Interviewer: The person who conducts the oral history interview. An oral history interviewer may also be referred to as an *oral historian*. The interviewer not only conducts the interview, they must keep all aspects of the oral history process in mind, including planning and implementing the project.
- Narrator: The person who will be telling their story and recollecting their past during an oral history interview.
 - This person can also be referred to as a *participant* or *interviewee*.
 - According to the Oral History Association, the term *narrator* is the most proper term to use “as an acknowledgment that the people we interview have agency and are not merely ‘living human subjects.’”
- Formal agreement (release form): Participating in an oral history interview may involve signing specific types of agreements or assigning intellectual property rights. Examples include deeds of gift, nonexclusive licenses, permission-to-use agreements, and transfer of copyright. See page 19 for an example of a Release Agreement Form.
- Transcription: A written record of the digital recording of an oral history. The transcription can be done by the interviewer, a project volunteer, or a contracted transcriber.
- Archive: A historical and valuable record (including photographs and letters).
 - An organization that maintains historical records and documents.
 - The physical space where the records are maintained.
- Repository: A physical or digital location where archives and/or artifacts are safely stored.
- Pseudonym: A name used in place of the original name. A pseudonym is used for those who wish to remain anonymous to protect themselves and/or their relatives, friends, or others who are mentioned in the interview.

For more information, visit the Oral History Association glossary at <https://oralhistory.org/best-practices-glossary/>.

Conducting an Oral History

Conducting an oral history takes time, preparation, and follow-through, but the results are well worth the effort. The oral history process looks like:

1. Preparation before the interview
2. The interview
3. Release agreement form
4. Transcribing
5. Audio editing
6. Interviewee edits
7. Final edits and corrections
8. Placement and distribution of copies

The following sections provide details on each step in the oral history process, including best practices, preparing for the interview, and transcription guidelines.

Before the Interview

- Contact the narrator well before the time you would like to conduct the interview. Explain your plans and purposes, and set the time for the interview.
- Educate yourself. Familiarize yourself thoroughly with the relationship between the narrator and the project you are working on. Conduct background research using credible sources.
- Outline the main points of interest for your interview. You should write out specific questions, but don't feel bound by your outline. Please refer to the section **Preparing Questions and Topics** on page 9 to learn more about how to formulate questions and what questions are best to ask during an oral history interview.
- Schedule an orientation meeting with the narrator before the interview. Use this pre-meeting to discuss possible questions, topics, and reasons for the interview with the narrator.
 - This pre-meeting is also a way for you and the narrator to get to know each other so that you both feel comfortable during the oral history.

Recording Equipment

There is a vast selection of recording equipment available to record, and even transcribe, an oral history. There is no right or wrong device, but capturing the best quality in sound and/or image is best for preservation purposes. Below are tips to help you find the right equipment for recording an oral history and to ensure you record a quality interview.

- Use a recording device that feels most comfortable for you and fits best for your budget. Examples of recording devices include: Zoom H4n Pro 4-Track portable recorder, Tascam DR-40X portable handheld recorder, the Sony ICD-PX470 Stereo Digital Voice Recorder, or your smartphone. If you are using your smartphone to record an interview, you can use the Voice Memo application – usually already downloaded on your phone – or other voice recorder applications. Other devices include video cameras – which can also be found on your smartphone – and even Zoom or other online video conferencing platforms.
- Practice using the equipment you will use to record the interview. This includes familiarizing yourself with the device, including the microphone, volume controls, pausing and stopping the recorder, saving the audio interview, or computer controls if you are using Zoom or other recording software.
- When conducting an oral history, place the recording device on a hard surface with the microphone facing the narrator.
- Organize your supplies. This may include an audio or video recorder, lapel mic, headphones, SD card, batteries, your notes, pen/pencil, release agreement forms, camera to take a photo of the narrator, batteries, and extension cord.
- Consider bringing a backup recording device in case your first device fails. A smartphone app, like a voice recorder or video camera, will suffice in these cases.

Preparing Questions and Topics

- Remember, interviewers should conduct background research on the person, topic, and larger context in credible sources. This will help you to create robust questions and ask good follow-up questions during the interview.
- Create an outline with a set of topics and/or questions to guide the interview. Remember, even though you have your questions in order, you may jump ahead to ask another question, come up with questions during the interview, or skip a question altogether. Don't feel obligated to stick to your script.

- Ask the narrator to bring photographs, clippings, or other documents that they can talk about during the interview. These items can help jog the narrator's memory.
 - If possible, make copies of these documents and include them with the physical recording when you deposit everything in the archives.

Sample Questions

Identifying information, also known as "The Lead"

My name is (interviewer's first name and last name) and I am interviewing (narrator's first name and last name) as part of (name oral history project, oral history event, etc.). Today is (day of the week, month, day, and year) and we are recording this oral history at (location of interview) in (city, state).

- When and where were you born?
- Where are your parents from?
- What are your parents' names?
- Do you know how your parents met? Can you describe it?
- Do you have siblings? How many? What are their names?
- What was your childhood like?
- Can you recall and explain a memorable moment in your childhood?
- What were some of your hobbies growing up? Do you still do any of these hobbies?
- What are some things you do that make Utah feel like home?
- What are some ways that your community celebrates its culture and traditions?
- Who inspires you in your community? Tell me about them.
- What are some places in Utah that you enjoy going to? Why?

The Interviewer Should Be:

- Someone who can sit quietly and listen.
- Willing to let the narrator express an opinion contrary to the interviewer's own without feeling compelled to contradict or re-educate the narrator.
- Not afraid to break in occasionally with a question or guiding comment.
- Firm enough to end the interview on time and to keep it within the bounds of whatever lines of inquiry have been planned.
- Alert enough and knowledgeable enough to recognize when the narrator brings up an unplanned but valuable subject.
- Able to pursue that new subject with questions.

"Two types of people who should not be assigned to interviewing. They are the compulsive talker and the compulsive director. Both types will end up with interviews of themselves."
 – Willa K. Baum, *Oral History for the Local Historical Society*, 28.

The Interview

Start of the Interview

- Before the interview: Be sure to check the amount of space left on your SD card and the battery of your recorder so that you will be able to finish the entire interview without having to stop to replace these items.
- Situate yourself and the narrator in comfortable positions and in a quiet room with minimal background noises and possible distractions. Make sure you both have water on hand. Try to avoid distractions, interruptions, and background noises from radios, television sets, traffic, or birds.
- Unless other circumstances dictate, interviews should not be scheduled for more than two hours. If the time extends beyond what is planned and the narrator appears to be tired or no longer paying attention, ask the narrator if it is fine to schedule another time to continue the oral history.

During the Interview

- Start the recording device.
- Start the interview with identifying information: name of the interviewer and the narrator, the date of interview, the location of the interview, and the subject of the interview. This is also referred to as the *lead*.
- If there are interruptions (a telephone call, a visitor, etc.), pause the recording and start up again when the interviewer is ready.
- Ask only one question at a time; that is, avoid running questions together or prolonging them so that the narrator is confused about what to answer.
- Take notes and write down questions that may arise during the interview.
- Ask follow-up questions.
- Allow silence to work for you. Wait for a response.
- Ask for specific examples if the interviewee makes a general statement and you need to know more. Or you might say, "I don't understand. Could you explain that in more detail?"
- Ask the narrator to spell names or clarify phrases used, dates, or places. Accuracy is more important than an uninterrupted interview. Do not interrupt the narrator; take notes of information to clarify at the end of the interview.

- Rephrase and re-ask questions if you would like to know more information or believe there is more information that the narrator can share.
- Unless you want one-word answers, phrase your questions so that they can't be answered with a simple "yes" or "no."
- Ask "essay" questions that prompt long answers whenever you can. Find out not only what the person did, but also what they thought and felt about what they did. Useful leads include: "What led up to...?" "Tell me about..." "What did you feel when...?" and "I would like to hear about..."
- Be flexible. Watch for and pick up on promising topics introduced by the narrator, even if the topics are not on your outline.
- Keep your questions brief and to the point.
- Ask easy questions first, such as brief biographical queries. Ask very personal or emotionally demanding questions after a rapport has developed.
- Be a good listener, using body language such as looking at the interviewee, nodding, and smiling.
- If necessary, use verbal encouragement such as "This is wonderful information!" or "How interesting!"
- Be careful to not pepper the interview with verbal encouragement such as "uh-huh," said at the same time that the interviewee is speaking, as these interruptions will clutter the recording and make it difficult to create a transcript.
- Do not interrupt the narrator unless the story strays too far from its course. Interruptions, when necessary, should begin with phrases like "let's go back to where you..." or "a moment ago you were telling me about..."
- To help the narrator describe persons, ask about their appearance, then about their personality, character, and activities.
- Try to establish where the narrator was at the time of the events being described as well as their role in them. Determine whether the narrator was a participant or a passive witness.
- Use the interview to verify or deepen information gained from other sources.
- Do not take issue with accounts given by the narrator even if you believe another version to be more accurate.

After the Interview

- Ask clarifying questions about information you may need for the recording's metadata or transcription. For example, the spelling of someone's name the narrator mentioned during the interview, or the address of the interview location.
- The interviewer should secure a release agreement form, by which the narrator transfers their rights of their interview to the repository or designated holder of their files. The form/s should be signed at the end of the last interview with the narrator. Please note: the narrator has a right to not sign the release form if they feel uncomfortable with some of the information they shared. Some parts of the interview can also be restricted for a certain period of time so that the interview can still be published, but any sensitive information will be redacted from the recording and the transcription. Please refer to the section **After the Oral History Interview** on page 22 to learn more about release agreements, copyright, and altering or withdrawing an oral history interview.
- Explain to them that any sensitive information can be redacted, on both the recording and transcription. Names given during the interview can be replaced with pseudonyms to protect identity.
- Gather information deemed relevant for future users to interpret the oral history, such as photographs, documents, or other records.
- Arrange for the digital recordings to be transcribed.
- Send the transcription to the narrator for edits and approval. If the narrator has any doubts or wants to clarify information in the interview, discuss the option of restricting certain parts of their interview that have sensitive information, or making a note in the transcription to add more context or clarification.
- Finish final edits on both the transcription and digital recording, if needed.
- Store the recording and transcription in a place where it can be preserved without damage and/or in a secure place.
 - To donate the recording and transcription to the Utah Historical Society, please contact Monique Davila at mdavila@utah.gov.
- Interviewers should strive to make the interviews accessible to the community and, where appropriate, to include representatives of the community in public programs or presentations of the oral history material.

- Sensitive materials can be protected by closing the tape for an agreed-upon period of years — that is, by sealing it so that researchers will not have access to it until the material in question is less sensitive.

Risks and Safety Measures

“Oral historians have ethical obligations that are both specific to oral history methodology and shared with other methodologies and practices, ranging from anthropology to archival work. Ethics encompasses the principles that should govern the multiple relationships inherent in oral history. Everyone involved in oral history work, from interviewers and narrators to archivists and researchers, becomes part of a web of mutual responsibility working to ensure that the narrator’s perspective, dignity, privacy, and safety are respected.” — “Statement on Ethics,” Oral History Association, <https://oralhistory.org/oha-statement-on-ethics/>.

- Interviewers must respect the rights of interviewees to refuse to discuss certain subjects, to restrict access to the interview, or, under appropriate circumstances, to choose anonymity.
- It is OK to pause the recording if the narrator becomes emotional, agitated, or uncommunicative during the interview. This may happen as the narrator recollects memories from the past. Ask the narrator if they would like to take a break and pause the recording before physically stopping the interview. Start the recording when the narrator is ready. If the narrator continues to talk through their tears, let them proceed.
- Be sensitive to topics that might be traumatic for the narrator. Do not try to be a therapist or heal people from their trauma. Do not blame the victim or try to deny narrators’ experiences. Do not change the subject if the narrator chooses to discuss a difficult topic. Instead, gain trust, ask appropriate questions, and develop empathy.
- If you, the interviewer, have a negative response to a narrator recounting a traumatic experience, delay, but don’t deny, your feelings. Remain composed during the interview, but you can and should process your emotions after the interview. This might include talking to someone about your feelings. See the section **Self-Care** on page 25 to find relaxing and fun activities.

Transcription

The transcription of an oral history interview is the last requirement of an oral history. Why do we need to transcribe an oral history? The transcribed interview is much easier for researchers to use than an audio tape because they can skim through the interview and more easily pinpoint areas of interest. A transcript may be more accurate and complete because the recorded words were put down in writing while the narrator was still available to clear up obscurities. Words that are hard to hear can be checked by the actual speaker; questions that were inadequately answered can be expanded by written comment.

“For those of us with an interest in human beings and language, the work of transcribing broadens our experience of speech, gives the analytical mind much more to play with than the text itself ever will, and strengthens our memory for the work that lies ahead....We talk a great deal; the opportunity to do nothing but listen is a rare treat.” — Willow Roberts Powers, *Transcription Techniques for the Spoken Word*, 10.

Until recently, most transcription work has been done manually, with transcribers spending an average of six to twelve hours typing the interview while listening, pausing, and restarting the recording. Now digital services such as Otter.a.i. are used to make the work faster and easier. Even then, the transcription still needs to be edited and reviewed, as words may be misspelled or voices misheard.

Transcribing can be challenging and time consuming, but it is also well worth the effort. Transcription work is necessary for an oral history to be complete. If there is absolutely no time or resources available for you to complete a transcript, write an abstract of the interview (a paragraph summarizing the interview). It will ensure that the contents of the interview are accessible to some extent.

Advice to the Transcriber

- Type the words you hear, in the order they are spoken. Listen and type with understanding of what the speaker means, but be careful not to get rolling with the speaker so well that you are inadvertently putting words and phrases into their mouth.
- Listen for the end of a sentence; even if it isn't a complete sentence, stop, and start a new sentence. Many narrators go on and on, using an "and" instead of a period. End those run-on sentences at reasonable points, but avoid breaking the conversation down into short, choppy sentences.

- Start a new paragraph when the subject changes.
- Contractions should be typed as spoken. “I’ll look that up; I’m not sure what year it was” offends no one and is more natural than “I will look that up; I am not sure what year it was.”
- Crutch words, such as “ah,” “well,” “and then,” “of course,” “you know,” “understand?,” “right?,” serve as either a pause to think of the next thing to say, or a check as to whether the other person is listening. Leave out most crutch words in transcribing if it is apparent that they are just pauses for thought. Leave in a few to show the narrator uses them, that this is an informal conversation. Leave them in if they have meaning.
- Do not transcribe interviewer comments which are clearly only to indicate they are listening, such as “my, my,” “how interesting,” “really?”
- You may omit false starts and unfinished sentences if it makes the transcript more readable AND it doesn't omit new information from the narrator. When in doubt, keep what the narrator says.
- For portions you cannot hear, listen again. Ask someone else to listen. Don’t waste too much time trying to hear what you can’t. If you still can’t make it out, use braces to indicate {an inaudible word}, a word or name you are not sure how to spell (for example, Bob {Siciliano?}), or words that you do not understand or that are from a different language whose spelling and meaning you don’t know (for example, {gemutlichkeit – German}). These can be clarified for the final draft. The interviewer or editor may be able to hear it later.
- Avoid using such words as “garbled” or “nonsense” that may be disrespectful. If you cannot determine what is being said, use {indiscernible}.
- The interviewer may indicate on the interview notes that certain portions are not to be typed, perhaps chitchat, an irrelevant story, or a repetition of an already told tale. If one aims for an informal interview, it is better to leave the tape running during the interview and then not transcribe irrelevant portions than to call attention to the recorder by turning the tape on and off. Omissions may or may not be indicated, according to the interviewer’s request. For example, {Interruption by take-off of an airplane, conversation about the hazards of living near an airport} may be fine, but not.
- Interpret sounds in the background if it adds to the interview. For example, {laughter} is fine if it follows a genuine joke, but it may be offensive if it is in an

inappropriate place or in fact represents a nervous giggle. Write something like {The narrator’s phone rang} if there is an interruption or a needed pause in the interview. The transcriber can try to indicate how the words were spoken—{softly}, {sadly}, {whispering}—and can underline words to indicate heavy emphasis, or put in ALL CAPS words that are spoken loudly for emphasis, but keep in mind the narrator’s feelings. Some indications of emotion are best limited to the tape where they can be evaluated in their full sound context.

- Use your notes to check proper names, places, and dates. If your notes do not indicate proper spelling of words in the interview, look up any names, either online, in the library, newspapers, etc. The names that cannot be checked should be called to the attention of the narrator when they review the transcript.

The Utah Historical Society Transcription Style Guide

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

The Utah Historical Society developed a style guide used when we transcribe oral history interviews. The goal is to make the transcriptions readable and accessible for the public. UHS also strives for accuracy in our transcriptions while simultaneously maintaining the voice of narrators. This guide not only shows how the Utah Historical Society’s transcription process operates but is a resource for oral historians. Note: This style guide was created using Otter.ai, an online transcription service which translates audio recordings and provides a written transcript of that recording.

Transcription Best Practices

- Capitalize proper nouns.
- Capitalize the terms Black, Brown, White, and Indigenous when referring to racial identities.
- Delete false starts, repeated words, or other words for clarity. You can also remove “filler” phrases or words like “um,” “like,” or “you know.”

- You may omit the interviewer’s active listening responses into the transcription if they do not add to the conversation—for example, phrases like “Yeah” or “Uh-huh.”
- When the text of the transcription needs a more in-depth interpretation, it may be appropriate to include a footnote. For example, you might add a footnote that clarifies an obvious historical inaccuracy or a historical pejorative.

Beginning of Transcription

At the beginning of the transcription, it is best to include the following:

This recording took place on ____ at _____. It was transcribed and edited by _____ while using Otter.ai, an auto-generative transcription service. We used the Utah Historical Society Transcription Style Guide to create this transcript.

You may find it useful to add additional information in this italicized section if it adds important information or context, although it is not required.

The Utah Historical Society conducted this interview for a scan-and-share event in conjunction with the Peoples of Utah Revisited initiative. Several members of the community came to this event at the Nettie Gregory Center on September 16, 2023. This interview was conducted outside and behind the Nettie Gregory Center. Because the center is located near a freeway overpass and next to an apartment building, audio may have picked up background noise.

Transcription Punctuation

To add clarity to the transcription, use brackets when adding words that are implied but not said.

I started in 2005 [or] 2006.

[I] thought it was a good idea.

Use quotation marks when the speaker is quoting/paraphrasing themselves or someone else.

And then I was like, “This sounds like a bad idea.”

Then he says, “Let’s go over here.”

Because Otter.ai doesn’t have the option to italicize or bold words, use quotation marks when someone is referencing any creative work like a book, song, or movie.

I really enjoyed reading “Little Women,” but my favorite movie is “Barbie.”

Use ellipses to indicate when a speaker does not finish a sentence.

That's interesting because I thought... No, that's not right. Today is the day of the race.

Or use ellipses when one speaker interrupts another to show it is the continuation of a sentence. (In some cases you can omit entirely what Speaker 2 says if it does not add to the transcription.)

Speaker 1: So we're case managers and social workers that were part of a youth program,...

Speaker 2: Oh, OK.

Speaker 1: ...very specifically Colors of Success.

Use parentheses if the speaker uses a parenthetical.

And being assigned to Jackson Elementary (which is just a couple of blocks north from us), we used the Nettie Gregory Center for after-school programming activities.

To add clarity to the transcript, use braces when you want to indicate an unspoken sound. (ex. {laughs}, {cell phone rings}, etc.)

Use braces to indicate when you are not able to transcribe a segment of the transcript.

I thought it would be a {indiscernible} for me to go.

Information for Participants in Oral History Interviews

Oral history is a form of historical research that opens an important window to understanding the past. The information you share in your oral history interview will provide firsthand experiences and new insights into your unique experiences, beliefs, and culture. Once finished, your oral history will include: an audio or video recorded interview, a written transcript of the recording, any related notes and records, and a picture of you.

Oral history interviews are conducted by people from all types of fields and professions, such as academic researchers, community organizers, and documentary filmmakers. How they approach their work and communicate with you may be very different. However, there are several key ethical responsibilities which oral historians of any background should share.

Oral History Process: The oral historian should explain the project to you – the participant – and how your oral history may fit into the project’s scope. Before the interview, you should understand the entire process of the oral history, such as:

- How long the interview may take.
- How it will be recorded (either video or audio).
- The options to edit the recording and the transcription.
- The formal agreement you will sign to participate in this project.
- The name and location of the repository where your recording and transcription will be preserved.
- The intended use of the recording and transcription and other related materials, how they will be cared for, and how they may be accessed by others.

Make sure you understand and are comfortable with the process and what the oral history project seeks to achieve.

Potential Benefits: Each oral history project is different, and the value of certain benefits may be different for you than for another contributor. Potential benefits may include the following:

- The project may align with your personal interests or goals.
- You may be given copies of the interview and related materials to use or share.
- Your community may be given special access to the records produced.
- The oral history project may provide some other service to your community, such as workshops or events.
- There can be personal or intangible benefits, such as the possibility of contributing to the historic record.

Potential Risks: In addition to the potential benefits, you may have concerns related to your participation. You should feel free to discuss your concerns in detail with your interviewer so that you can come to an informed decision before the interview begins.

- You are within your rights to ask questions, including what steps have been made to minimize the risk of physical, psychological, social, or economic harm to you.
- Standard oral history practice calls for making the interviews accessible to researchers and the general public. You are free to request confidentiality or even to withdraw from the project at any point prior to its completion, or the time at which the material is made available. See **Altering or Withdrawing Your Oral History Interview** below for more information.

The Recording Process: The oral history is recorded using either audio or video recording equipment. Your interviewer will place the equipment to get the best possible recording. Work with them to make certain you are comfortable throughout the process. While you might be distracted by the recording equipment when the interview begins, most participants are able to easily focus on answering questions and sharing stories as the interview proceeds.

During the Oral History Interview: The oral history interview can feel like a conversation, but there are important differences. Most interviewers will limit their own speaking so as to focus the interview on your experiences and memories. Keep in mind that at all times:

- You are free to not answer questions.
- You are not required to discuss any topics that make you uncomfortable or cause you distress.
- The interviewer should not pressure you to change your mind, although they may ask you why you would prefer to not speak about a particular subject in order to understand why you are choosing to refrain from speaking about it.
- If the questions you are asked are not clear or seem irrelevant, you may ask for clarification.
- Don't feel rushed to answer a question. You should feel free to think about how you want to respond and take the time necessary to answer the question fully.
- You can take a break from recording.
- You are allowed to end the interview at any time.

After the Oral History Interview

Formal Agreement: At the conclusion of your interview, the interviewer will request a written declaration to formalize the agreed upon terms of use for the recorded interview. This process is often referred to as legal release or formal agreement. In recognition of the fact that you, the narrator, own the words you speak in the interview, the formal

agreement is your opportunity to provide permission for others to have access to and use your interview. On this form, you may provide a blanket permission for the public to access and use your oral history, or you may decide to place certain restrictions on its use. Speak with your oral historian about the options. After consenting, you have a right to receive a copy of the legal release terms.

Copyright: When you sign a legal release, you might also be asked to assign your copyright of the interview to the oral historian or to an archive, as part of, or in addition to, the release document. You may also be given the option of assigning your interview to the public domain. All of these options are in place so that others may quote from your interview in books, on radio, in films, or other media. Libraries and archives often wish to hold copyright so that they can protect the materials now and long into the future. Ask your interviewer to explain the document you are signing and, if you wish, other options that exist for planning public access to, and use of, your interview. Note that any time you sign a document, you should request a copy of that document to refer to later if needed. Understanding the terminology is important; always feel free to ask questions when in doubt.

Altering or Withdrawing Your Oral History Interview: When the interview finishes, you are welcome to raise questions or concerns about the interview or the oral history project. Know that you can restrict an interview from the public, make changes before it is shared, or withdraw your interview even after you have recorded your oral history interview and/or, in many cases, signed a formal agreement. Depending on the plan for long-term storage and access, this may be handled in a variety of ways. The oral historian should be able to share any information related to withdrawing your interview.

Once an oral history is shared with the public, or entered into an archive, it may not be possible to fully remove it. Be aware that even if an oral history is closed to the public for a period of time, certain legal challenges — such as subpoenas or open-record requests — may make some restrictions unenforceable.

Much of this section above, “Participants of Oral History Interviews,” comes from the Oral History Association online resource, “OHA Principles and Best Practice”.

<https://oralhistory.org/for-participants-in-oral-history-interviews/>

Oral History Quick Tips

DO

- Your research before the interview.
- Know your equipment.
- Begin with general questions, then move to specific ones.
- Listen carefully.
- Indicate empathy when appropriate.
- Follow the narrator's pacing.
- Use follow-up questions.
- Explain the reason for the change in topic.
- Inquire when appropriate.
- Ask a challenge question in a sensitive manner.
- Request clarification when needed.
- Pick up on a topic the narrator indicates as important.
- Be willing to follow unexpected paths, but don't stray too far from reasons for an interview.
- Recognize differing and shared perspectives and life experiences.
- Have fun!

DON'T

- Interrupt the narrator.
- Keep repeating what the narrator has just said.
- Infer something the narrator has not said.
- Make assumptions.
- Make irrelevant, distracting comments.
- Ignore the narrator's feelings or fail to give an empathic response.
- Forget to check the sound on the recorder.
- Let the narrator sidetrack the conversation on an irrelevant topic.
- Ask leading questions.
- Ask several questions at the same time.
- Dominate the interview with your display of knowledge.
- Insert yourself into the conversation.

Oral History Checklist

Before the interview

- Contact the narrator and request an oral history interview
- Explain what an oral history interview is to the narrator
- Prepare a general chronology and list of topics that you want to ask during the interview
- Role-play and practice with your equipment
- Pre-interview to meet the narrator
- Check batteries etc. on the recording device

During the interview

- Turn on the recording device
- Begin with the lead: name of interviewer and interviewee, date, location, interview subject
- Ask one question at a time
- Listen
- Let the silence happen
- Take notes during the interview, but pay attention to the narrator

After the interview

- Have the narrator sign the oral history release agreement form
- Take a photo of the narrator
- Transcribe the digital recording
- Send a copy to the narrator to edit
- Complete final edits
- Distribute copies of recording and transcription

Self-Care

Oral history work is extremely important and rewarding. It can also be emotionally exhausting and physically draining for both the narrator and interviewer. Remember to take some time for yourself and practice self-care. Below are many ways for you to take a break and take care of yourself while doing an oral history project.

- | | |
|--|---|
| <input type="checkbox"/> Cook your favorite dish or cook a recipe that you've never tried before | <input type="checkbox"/> Make a scrapbook with pictures |
| <input type="checkbox"/> Take a cooking class | <input type="checkbox"/> Go to a library or bookstore |
| <input type="checkbox"/> Eat your favorite ice cream | <input type="checkbox"/> Read |
| <input type="checkbox"/> Go out to eat or get takeout | <input type="checkbox"/> Visit a museum or local art gallery |
| <input type="checkbox"/> Go to your favorite café for coffee or tea | <input type="checkbox"/> Go shopping |
| <input type="checkbox"/> Text message your friends | <input type="checkbox"/> Sleep or take a nap |
| <input type="checkbox"/> Go out with a friend | <input type="checkbox"/> Take a bubble bath or shower |
| <input type="checkbox"/> Play with your pet | <input type="checkbox"/> Get a massage |
| <input type="checkbox"/> Go outside and watch the birds and other animals | <input type="checkbox"/> Go for a drive |
| <input type="checkbox"/> Go for a walk | <input type="checkbox"/> Go to a spa |
| <input type="checkbox"/> Exercise | <input type="checkbox"/> Pray or meditate |
| <input type="checkbox"/> Ride your bike | <input type="checkbox"/> Trim and paint your nails |
| <input type="checkbox"/> Go for a swim | <input type="checkbox"/> Change your hair color |
| <input type="checkbox"/> Go to a sporting event, like a baseball game | <input type="checkbox"/> Write in your journal |
| <input type="checkbox"/> Go hiking | <input type="checkbox"/> Draw or paint a picture |
| <input type="checkbox"/> Stretch your muscles | <input type="checkbox"/> Listen to some upbeat, happy music (start making a collection to play when you're feeling upset) |
| <input type="checkbox"/> Watch a funny movie | <input type="checkbox"/> Listen to music |
| <input type="checkbox"/> Go to the movies | <input type="checkbox"/> Turn on some loud music and dance |
| <input type="checkbox"/> Watch television | <input type="checkbox"/> Take photographs |
| <input type="checkbox"/> Play video games | <input type="checkbox"/> Participate in a local theater group |
| <input type="checkbox"/> Do a puzzle | <input type="checkbox"/> Plant a garden |
| <input type="checkbox"/> Knit, crochet, or sew | <input type="checkbox"/> Work outside |

Adapted from Matthew McKay, Jeffrey C. Wood, and Jeffrey Brantley, *The Dialectical Behavior Therapy Skills Workbook* (Oakland, CA: New Harbinger Publications, 2007), 15.

Resources

Books

- Baum, Willa K. *Oral History for the Local Historical Society*. 3rd ed. Nashville: American Association for State and Local History, 1987.
- Baum, Willa K. *Transcribing and Editing Oral History*. Nashville: American Association for State and Local History, 1991.
- DeBlasio, Donna M., Charles F. Ganzert, David H. Mould, Stephen H. Paschen, and Howard L. Sacks. *Catching Stories: A Practical Guide to Oral History*. Athens, OH: Swallow Press, 2009.
- Dunaway, David K., and Willa K. Baum. *Oral History: An Interdisciplinary Anthology*. 2nd ed. Walnut Creek, CA: AltaMira Press, 1996.
- Lanman, Barry A., and Laura M. Wendling. *Preparing the Next Generation of Oral Historians: An Anthology of Oral History Education*. Walnut Creek, CA: AltaMira Press, 2006.
- Neuenschwander, John A. *Oral History and the Law*. 2nd ed. New York: Oxford University Press, 2014.
- Powers, Willow Roberts. *Transcription Techniques for the Spoken Word*. Walnut Creek, CA: AltaMira Press, 2005.
- Ritchie, Donald A. *Doing Oral History*. New York: Twayne Publishers, 1995.
- Sommer, Barbara W., and Mary Kay Quinlan. *The Oral History Manual*. Walnut Creek, CA: AltaMira Press, 2002.
- Whitman, Glenn. *Dialogue with the Past: Engaging Students and Meeting Standards through Oral History*. Walnut Creek, CA: AltaMira Press, 2004.
- Yow, Valerie Raleigh. *Recording Oral History: A Practical Guide for Social Scientists*. Thousand Oaks, CA: Sage Publications, 1994.
- *The Oral History Review*, journal of the Oral History Association.

Websites

- Oral History Association (OHA)
 - <https://oralhistory.org/>
 - Best Practices, guidelines, and toolkits
 - <http://www.oralhistory.org/about/principles-and-practices/>
- Library of Congress Veterans History Project
 - loc.gov/vets/vets-portal.html
- Storycorps NPR
 - npr.org/series/4516989/storycorps
- Smithsonian Institution Archives
 - <https://siarchives.si.edu/history/how-do-oral-history>

**UTAH HISTORICAL SOCIETY
ORAL HISTORY AGREEMENT AND DEED OF GIFT**

I hereby give the Utah Historical Society (UHS) copyright of the recording and transcription created from the interview(s) recorded on **(date of interview)** _____ . I grant the UHS the right to make the recording and transcription available to the public for research, education, exhibitions, publications, presentations, and the promotion of the UHS. **(Initials):** _____

NARRATOR: _____

ADDRESS: _____

CITY/STATE/ZIP CODE: _____

PHONE NUMBER: _____

EMAIL: _____

SIGNATURE: _____

DATE: _____

INTERVIEWER: _____

SIGNATURE: _____

DATE: _____