Oral History guidance

Oral history is the recording and archiving of people's memories, feelings and attitudes.

Contents

Introduction

It captures people's experiences and opinions that shape the way they make sense of their lives. In this document we provide guidance about planning and running an oral history project.

Oral history is first-hand evidence of the past. It needs to be documented and archived to professional standards. Only then can we be sure that recordings will be preserved and made accessible for current and future generations.

It is also important to use these testimonies. Oral histories can be shared as a resource in their own right, or as part of the way we explain a museum collection, historic building or place.

Oral history interviews should be substantial records of the past. If your project is focused on reminiscence, unstructured short conversations, talking heads or vox pops this guidance won't be helpful to you. Whilst these activities can be useful in engaging people with heritage, we do not consider them oral history.

The role of oral history

Unless we collect and preserve people's memories then they can be lost. Spoken accounts can:

- fill gaps in historical evidence and secure history at risk
- bring new perspectives and challenge our view of the past
- give voice to those people excluded from traditional historical records
- document traditions and stories passed down from generation to generation
- record the changing and enduring culture of a place or community, or shifts in everyday practices
- contribute to the preservation of customs, dialects and ways of speaking

Everyone, irrespective of their background, has a unique story to tell. Oral history allows people whose voices might not otherwise be heard to share their experiences. The act of retelling life events can help people understand their lives and often

contribute to a sense of wellbeing and identity both for individuals and communities. At their most powerful, oral histories can explain, enrich understanding and encourage empathy with others.

"The project gave me a sense of belonging. I forgot I was a refugee. I was an active citizen and telling my story helped me overcome the sadness inside me. I thought I could help others to move on." Marie Lyse Numuhoza from Rwanda, World in the East End, V&A Museum of Childhood

Sometimes people's testimonies contradict each other. Memories can be selective and interviews capture different viewpoints, often influenced by factors such as age, gender, social status and cultural background. Like any historical source, oral histories are open to debate, analysis and interpretation. That's what makes oral history challenging and exciting and just as valuable as other historical data.

Our outcomes

Recording, archiving and using oral histories can help you to meet our outcome: Heritage will be identified and better explained.

For example, new testimonies, such as those of people who grew up in care, may be 'identified' through high quality interviews made accessible to the public. Existing oral histories, say, of Italian migrants living in Wales, may be 'better explained' through a new online exhibition and community workshops.

An oral history project could also help you to achieve other outcomes in our funding framework:

- A wider range of people will be involved in heritage
- People will have developed skills
- People will have learnt about heritage, leading to change in ideas and actions

Scoping your project

Oral history can be about a huge range of themes. For example, interviews have recorded changes in industry, the significance of well-loved places, and the history of communities.

"We would go nutting in late August and September, shake the trees and the nuts would come down like snowflakes. Beautiful, brown hazelnuts, Lovely." Ted Bowness, Audiotrail, High Fell: The Cumbrian Landscape Story, Cumbrian Wildlife Trust

"We didn't get the same amount of money as the white folks get … six pounds, 10 shillings per week, that was what my wages was … the white miners, or the white maintenance workers, were getting more". Rev Kenneth Bailey (former miner), Digging Deep, Coalminers of African Caribbean Heritage

"Pride marches were really getting established in the '80s, so we thought why not have the Jewish Gay Group, 'Bagel and cream cheese' stall? We would always sell

out ... and some people actually joined the group on the strength of that." Russell Vandyck, [Rainbow Jews](#)

Oral histories have also challenged stereotypes and explored sensitive topics. For example, the Scope project, [Speaking for Ourselves](#), captured the experiences of people with cerebral palsy, including prejudice.

What is your theme?

You will need to decide on a theme for your project: whether it is about a particular community, place, event, activity, issue or other subject. You may want to break this down into topics. For example, the history of a neighbourhood could cover people's homes, family life, where they work, shop and spend their leisure time, but do not be too prescriptive as subjects may emerge that you do not expect.

Is there a need or demand for your project?

Gather evidence of interest in your chosen topic through consultation with key organisations, communities and individuals. Check with the Oral History Society's [regional networkers](#), the British Library [Oral History department](#) if it's a national project, or your local archive to see if your chosen topic may duplicate other projects and, if so, how it could be adjusted to enhance existing collections.

Sharing oral histories

Oral histories have been shared through a range of outputs, for example, exhibitions, art installations, theatrical or musical performances, educational materials, films and walking tour apps. They can put people back into the interpretation of buildings and landscapes. Consider how you will use your stories and engage a wider audience with the material.

For example:

- Memories of the [Peace Memorial Hospital](#) were shared through a tea party, museum exhibition and a permanent display in the hospice.
- [North Staffs Miners' Wives Action Group](#) transformed interviews into various materials, including a theatre piece called 'Digging in'. This toured schools, with children learning miner's songs and making marching banners.
- For [Punk Snow](#), young people created a filmed oral and photographic history of punks in 1970s Liverpool.

Oral history projects do not always have to collect new oral histories. We also welcome applications that engage with oral histories already available in our archives. The [UK Sound Directory](#), supported by HLF, lists many of these collections.

Planning your oral history project

Time

Our grantees often underestimate the time needed to run an effective oral history project. Be aware that it takes time to build relationships with potential partners, volunteers and participants, and the process of documenting your interviews can be time-consuming too.

Plan different stages into your project. Recruiting and training volunteers might be a first step. Allow sufficient time to identify and recruit interviewees, particularly if you are interviewing people not familiar with your organisation, or dealing with a sensitive topic.

Be specific in your application about the number of interviews you will record, how long they will be, how many will be summarised and/or transcribed and archived into a collection.

An *experienced* full-time interviewer can be expected to complete interviews with between 30 to 50 people in a year (150 – 250 hours). Longer whole-life stories might take more hours over several days or weeks. If you are training volunteers to collect interviews, be realistic about how many they are likely to achieve.

On average it takes two hours to summarise a one-hour interview (2:1 ratio). Full word-for-word transcriptions take longer (6:1 ratio). You will need to allocate sufficient time to do this. You might also need to employ a qualified transcriber.

To summarise, as well as the interview time, also plan for:

- training, preparation and research
- building and maintaining relationships with interviewees and/or volunteers
- travelling to interviews
- cancellations and postponements
- uploading and backing-up copies of the recorded interviews
- documenting each interview (with a written summary)
- transcribing or translating interviews if required
- getting interviewee Recording Agreements
- choosing and editing extracts from the interviews and developing outputs

Staffing

You might need new staff,volunteers or freelancers, or a combination of these to deliver your project. Oral history projects demand a range of skills and staff may be needed for a range of roles, for example:

- Project manager
- Oral historian or oral history trainer
- Interviewers/fieldworkers
- Translators
- Transcribers
- Archivist
- Data manager
- Outreach worker/educator/artist to run workshop sessions

- Evaluator
- Web designer

Equipment

First decide whether to record in audio or video format. Each has its merits. Generally, one-to-one audio interviews encourage a confidential and relaxed atmosphere for people to speak openly. The outputs you want to create might also influence your format, for example, audio-visual displays or YouTube films will require video interviews. It is also possible to combine longer audio interviews with shorter selective follow-up video recordings, especially where there is something visually interesting to document, such as a place or piece of equipment.

For both formats, you will need computer equipment and software to access, rename, backup and document the recordings. Seek up-to-date advice on the most suitable equipment, be familiar with the technical options and get quotes for costs. Care needs to be taken to store recordings as electronic files before they are passed into public records.

Up-to-date advice on equipment can be found on the Oral History Society website.

Project outputs

Think about how you want to engage the public with your oral history project, e.g. events, publications, performances, learning resources or a website, and plan in the resources you will need.

Partners

Consider the partnerships you will need. Working with community organisations, colleges or youth groups can help you reach different people, recruit volunteers and interviewees, and collect new stories.

Partnerships with a local museum, library or archive will help ensure the oral histories are documented and archived to professional standards, held in compliance with data protection legislation and accessible in the long term. Consider where to deposit oral histories and other materials, and approach potential partners as part of your planning – they will need to agree to accept your recordings and there may be related costs.

You might also need to develop partnerships to share the oral histories. For example, work with host organisations if you want to show an exhibition, or teachers if you plan to produce school resources.

Evaluation

Evaluation of your project needs to be built in from the outset. Ongoing feedback from staff, volunteers and participants and partners can help you achieve your targets, and outcomes and ensure quality throughout the delivery of the project. Your evaluation should focus on what has changed as a result of your project – what

heritage has been saved, what skills people have learned, what people told you about how they responded to change.

Interviewers and other staff and volunteers

The quality of the interview largely depends on the skills of the interviewer, but in some cases you should consider the gender, or cultural background of those being interviewed. People are not always more open and relaxed with an interviewer from the same community but sometimes a shared background and understanding can help. On certain sensitive issues, for example some health-related topics, you may need to match the gender of interviewer and interviewee.

You may also need interpreters or translators. There are arguments for and against using family and community members or professionals in this role. Consult with experienced professionals, community representatives or the interviewees themselves if you are unsure what to do and budget accordingly.

If you are working with volunteers, it might be helpful to recruit people with knowledge of a particular language, a local community or a specific issue. Consider the implications if you intend to ask volunteers to be interviewers; ensure they are properly trained so that interviews are of high quality. It may not be appropriate for inexperienced volunteers to interview survivors of trauma or victims of abuse, for example. Whatever the project, you should employ people with proven expertise in oral history to work alongside volunteers, to ensure that interviewees are approached sensitively and appropriately and that recordings are of a high quality.

Training and mentoring

Staff and volunteers need to be skills-assessed when they join your project and a training programme will need to be tailored to their needs. A minimum of three to five days training/mentoring over your project is recommended, particularly if you do not have experience recording oral histories. The Oral History Society and British Library run a range of [courses](#) and others are available. Other specialist training and mentoring may be required. This could include training to work with vulnerable people, if the project involves children, vulnerable or multi-lingual adults. Think about any other skills, training and ongoing support volunteers might need.

Our country and regional teams can put you in touch with other oral history projects and the Oral History Society has [representatives](#) across the UK.

Practical risks and safeguarding

In line with your statutory responsibility, you must identify and assess any potential risks in relation to the personal security of interviewers and interviewees, especially if they are vulnerable. Make sure you have safeguarding processes in place. For advice and training providers see the [NCVO](#) website. Involve the school, college or youth workers as early as possible, if working with students or young people. Consult with local disability organisations if you plan to involve disabled people as interviewers or interviewees. You may also need to budget for specialist equipment.

Your responsibilities – recording agreements and Creative Commons

Important recording agreements

Two documents need to be signed by all interviewees. These will help you manage the relationship with the interviewee and help you comply with data protection legislation. All interviewees should understand fully what is involved in the interview: that they can withdraw at any time before the interview is archived; can retain or transfer copyright; and that their agreement will be sought as to how the material will be used in the longer term. The British Library provide examples of the documents they use which you can adapt for your project.

You will need an Interview Participation Agreement, which an interviewee signs before the interview starts. This can be combined with an information sheet to explain your project to interviewees. You need to document each individual's agreement to take part in an interview, and explain how you will store, use and provide access to their personal data, both during the project and when recordings are archived and accessed in the future.

After the interview has been completed an interviewee signs an Interview Recording Agreement, which determines how their interview should be archived, made publicly available and potentially used to create publications, exhibitions, learning resources and other outputs. In an HLF project, Creative Commons should also be covered in the Interview Recording Agreement. The Interview Recording Agreement should be shown to participants before the interview but signed after the interview has taken place. In some instances, with sensitive material, people may want all or part/s of the interview to remain confidential ('redacted') or only released after a set period of time ('embargoed'). These requests should be made clear on the form that the interviewee signs and archived alongside the recording for future reference.

The British Library sample form includes the option for the interviewee to pass their copyright in their spoken words to the Library. Future publication and reuse of their material is more straightforward if project managers or interviewers seek the transfer ('assignment') of copyright from the interviewee to the project or place of deposit. In practice, where good relationships have been established and maintained, most people are comfortable to assign copyright in the knowledge that their experiences will help build public understanding about the past.

A public archive museum or similar will also find it more straightforward to comply with data protection legislation. The Oral History Society provides useful guidance on the law and your responsibilities. In brief, every instance of processing personal or sensitive data, such as oral history recordings and documentation, must be justified with a 'legal basis for processing'. 'Archiving in the public interest' is one such legal basis and the Oral History Society recommends you use it in your documentation. Any organisation or individual which archives personal data 'for purposes having public value beyond the immediate interests of the organisation itself' is 'archiving in the public interest'.

The Oral History Society has published [ethical guidelines](#) and the UK Data Service provides advice on involving [children and people with learning difficulties](#).

Creative Commons

National Lottery funded digital outputs should be available free to the public for non-commercial purposes. This includes oral history recordings and related digital learning resources, except where permission is withheld. Creative Commons provides a set of standard licences that specify in simple terms what members of the public are allowed to do with such material once it is published or made available.

Interviewees need to understand and agree to the different ways their testimony can be used under the Creative Commons licence agreements. We recommend you insert a statement on licensing into the Interview Recording Agreement.

For digital extracts that have been curated or selected by your project team in conjunction with interviewees for example a collection of extracts to be shared on the web, an app or sound trail, our Terms of Grant require you to use the Creative Commons licence, 'Attribution Non-Commercial' (referred to as CC BY-NC). This means:

- that all such work must be attributed to its original creator (you, as our grantee, and the interviewee should specify the way in which that credit is given); and
- the material cannot be used for commercial purposes.

In this case, you might use this form of words in the Interview Recording Agreement:

'I understand and agree that the digital excerpts from my interview that have been selected for use [in learning resources / an exhibition / a website etc.] will be made available to the public through the Creative Commons licence 'Attribution Non-Commercial' (referred to as CC BY-NC), that the work will be attributed to me and that it cannot be used for commercial purposes.'

For making whole interviews available, for example a whole set of unabridged digital recordings, you can use a less permissive licence: 'Attribution Non-Commercial No Derivatives' (CC BY-NC-ND). This would help prevent inappropriate reuse, re-interpretation or manipulation of people's testimonies by others. Insert the following into the Interview Recording Agreement):

'I understand that, in order to help prevent any inappropriate reuse or manipulation, whole digital interviews will be made available through the Creative Commons licence, 'Attribution Non-Commercial No Derivatives' (referred to as CC BY-NC-ND), that the work will be attributed to me and that it cannot be used for commercial purposes or changed in any way.'

If the interviewee wishes to remain anonymous, you should adapt the CC licences to remove the 'Attribution' clause; they will therefore be CC NC and CC NC-ND.

Only the copyright holder can grant a Creative Commons licence. In those unusual cases where an interviewee chooses to retain the copyright you will need to reflect

this in the wording of your form. You will need to make them aware of our Terms of Grant and ask them to grant the appropriate licences as above.

Your grant application should show that you understand our requirements linked to Creative Commons and how you intend to comply. You will be responsible for ensuring that all the legal paperwork is in place so that recordings can be made publicly available, marked with the relevant Creative Commons licence/s.

Documenting and archiving your recordings

Archive and deposit arrangements

Oral history recordings must be documented, archived and made accessible. Local archives, libraries, museums or heritage centres might be well-placed to do this or to provide professional support if you wish to take on all or part of this responsibility yourself.

Before deciding where to archive the oral histories, ensure that they will be accessible. For example, where you plan to deposit the recordings must be easy to get to, with full access to the building and/or via the web (See the W3C Accessibility Guidelines). You might also need to think about multi-lingual user guides.

Partnerships with local archives, libraries, museums or heritage centres should be in place from the beginning. You will need a written agreement (called a deposit agreement) with the organisation that has agreed to archive your recordings, ideally before making your application. Remember that you can include in your budget any costs that arise from archiving your recordings. Discuss this with your archive partner.

If you do not place the recordings in an archive, library or museum you need to show an alternative which safeguards them for the future and allows public access.

Be clear about other material you are gathering, such as photographs, documents or artefacts, and how these will be archived and made available to the public. You may not be able to place all material in the same permanent home. Websites can be archived with the UK Web Archive.

Check with archive partners that as far as possible they meet British Standard PD5454: 2012 'Guide for the storage and exhibition of archival materials'. There are also international standards for archiving audio-visual records which they should be aware of: 'Guidelines on the Production and Preservation of Digital Audio Objects' IASA-TC 04 (2009).

Backing up your recordings

During the project itself, before you archive the recordings, make sure that you have allocated sufficient time, staff resources, and the right computer equipment, to back up all your audio, video, image and text files to more than one external hard drive and/or a secure server system. Ask your archive partner for advice.

Documenting the interviews

Once you have downloaded, renamed, saved and copied your recording you should summarise or transcribe its content. Use the file-naming system you have adopted and the date of interview, list each significant theme as it occurs, cross-referenced to the time-coded track-mark on the digital recording. Personal details of interviewee such as address, telephone, email and name should be kept separate from the recordings and summaries, but should be clearly cross-referenced in line with your data protection policy.

To produce a full verbatim transcription of the recording you can either employ a professional transcriber or use special equipment or transcription software such as www.nch.com.au/scribe controllable via 'hot keys' or remote foot pedal or www.startstop.com/home.asp.

Full transcriptions are not essential for archiving, as long as there is a summary. However, you may need to transcribe extracts. Summarising an interview, and transcribing parts are both very time-consuming. Selection and editing of interviews, for example for an exhibition, website or soundtracks also takes time. For basic speech editing you can download free open-source software such as www.audacity.sourceforge.net but there are low-budget editing software packages that might suit your needs better, for example Elements 9.5 or Sound Forge Audio Studio

Budget

Make sure that your budget covers all project costs. These will vary according to the number of paid and/or volunteer staff; how much training, mentoring and research is required; the number of recorded interviews; the travel involved; whether paid translators or transcribers are needed; the number of interviews documented; and the outputs.

Staff and volunteer costs will likely include:

- Training
- Travel – allow a minimum of two visits per planned interview and build in contingency for cancellations
- Recruitment
- Salaries and fees for project staff, including freelance consultants.

You need to offer a fair salary or fee for paid staff. Seek advice where necessary. There are nationally-agreed minimum pay rates for some professionals, such as archivists and museum staff.

Equipment costs might include:

- Solid-state flashcard recorders
- Video recorders (DV) and tripod
- Microphones (e.g. lapel microphones, two per recorder plus spares)
- Memory cards (SD) 4GB to 16GB

- Equipment bags
- Multiple external hard-drives for back-up
- Computer with software to manage digital file upload and transfers
- Printer/scanner
- Transcription equipment/software
- Editing software
- Stills digital camera
- Lockable storage furniture

You may want to build in the costs that **partners** will incur, as well as any in-kind contributions they can make. For example, this could include training an archive's volunteers if they are not familiar with handling digital oral histories. Consider how you will **recruit interviewees** and any associated costs, for example publicity, stalls at events, travel to meet new contacts.

You will also need to budget for any **outputs** you have planned, such as exhibitions, audio trails, publications or events.

Allocate a proportion of project costs to **evaluation.**

More information and resources

Oral History Society

For introductory advice, training, useful reading, helpful local and regional contacts:
https://www.ohs.org.uk/

The British Library Oral History Department

Thousands of oral history recordings are described on www.bl.uk/oralhistory/collections, thousands are online at http://sounds.bl.uk/Oral-history or can be listened to at the British Library.

Creative Commons

https://creativecommons.org/licenses/

UK Web Archive

www.webarchive.org.uk/ukwa/collection/65208410/page/1/source/collection

Oral History in the Digital Age

https://ohda.matrix.msu.edu/

British Universities Film and Video Council

www.bufvc.ac.uk

Scottish Oral History Group

www.thesohg.org

Scottish Life Archive

https://www.nms.ac.uk/collections-research/research-facilities/scottish-life-archive/?item_id=

Archives and Records Association (ARA) Film, Sound and Photography Section

http://www.archives.org.uk/about/sections-interest-groups/film-sound-and-photography-group-fspg/news-and-events-sp-1795750410.html

Your local record office, archive, museum or library:

www.local-history.co.uk

www.nationalarchives.gov.uk/archon/

Age Exchange

www.age-exchange.org.uk