Oral history good practice guidance

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Oral history is the recording and archiving of people's memories, feelings and attitudes. It plays a crucial role in expanding the historic record to include a wider range of people and their experiences.

By reading this guidance you'll learn how to plan and run a successful oral history project. It explains what oral history is and how to run an oral history project from scoping to planning and execution, including the need for recording agreements and archiving. It also looks at how to budget an oral history project and provides sources of further information.

About oral history

Oral history captures people's experiences and the opinions that shape the way they make sense of their lives. It is first-hand evidence of the past. Oral history needs to be recorded, 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's 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, community or place.

Oral history interviews should be substantial records of the past. If your project is focused on reminiscence group work, unstructured short conversations or vox pops, this guidance might not be helpful to you. While 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 save people's memories 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 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 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. Oral history projects can also contribute to our investment principles.

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.

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.

- As part of the Cumbrian Landscape Story project, Ted Bowness recorded his story for the High Fell audio trail: "We would go nutting in late August and September, shake the trees and the nuts would come down like snowflakes. Beautiful, brown hazelnuts. Lovely."
- Former miner Rev Kenneth Bailey shared his experience for the Digging Deep, Coalminers of African Caribbean Heritage project: "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."
- Through the Rainbow Jews project, Russell Vandyck shared: "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."

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 the prejudice they've faced.

What is your theme?

You will need to decide on a theme for your project: whether it's 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 don't be too prescriptive as subjects may emerge that you don't 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 should be shared, for example via websites, exhibitions, art installations, theatrical or musical performances, educational materials, films and walking tour apps. They can add 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:

- NHS at 70: the Story of Our Lives created a digital archive of the service's history. 150 volunteers were trained to collect interviews from staff, patients and families, which have been used in touring exhibitions and short films.
- Stories from the Estate recorded the experiences of early residents who made West Belfast's Twinbrook Estate their home in the 1970s during some of the worst periods of the conflict. Alongside their testimony, photographs

and newspaper articles help to illustrate the period through an online exhibition.
- Manchester Jewish Museum uses spoken accounts throughout themed galleries and the synagogue itself to bring stories to life. There is also a room dedicated to oral histories, where visitors can sit and listen to excerpts from a range of interviews.
- Thirty students interviewed theatre makers for The Soho Poly: Inspiring Future Generations project, capturing an inclusive history. Interviews are available online and also form part of an education resource to inspire future generations and a walking tour on radical theatre.

Oral history projects 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 lists many of these collections.

Planning your oral history project

Time

People often underestimate the time needed to run an effective oral history project. It takes time to build relationships with potential partners, volunteers and participants, and the process of collecting and documenting your interviews can be time-consuming too.

Plan different stages into your project. Recruiting an oral history professional and training volunteers might be a first step. Allow sufficient time to identify and recruit a broad cross-section of 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.

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. You can use speech-to-text software, but it will still require manual checking and correcting, which may be significant depending on the audio quality of the recording and how accented the speech is.

So, as well as the interview time, also plan for:

- training, preparation and research
- building and maintaining relationships with interviewees and/or volunteers
- discussing the pre-interview documents with interviewees and obtaining permission
- 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 across 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

For more guidance on recruiting see ‘interviewers and other staff and volunteers’ later in this guidance.

Equipment

First decide whether to record in audio or video format. Each has its merits but video tends to be more expensive and require different skills. 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 also need computer equipment and software to access, rename, backup and document the recordings. Video requires large data storage. Seek up-to-date advice on the most suitable equipment, be familiar with the technical options and get quotes for costs.

The Oral History Society website has up-to-date advice on equipment and advice on recording remotely via the internet.

Project outputs

Think about how you want to engage the public with your oral history project, eg: 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 for the future, and approach potential partners as part of your planning – they will need to agree to accept your recordings and there may be related costs which you can include in

your budget.

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.

Interviewers and other staff and volunteers

The quality of the interview largely depends on the skills of the interviewer, so carefully consider who you use to conduct your interviews. In some cases, a high degree of expertise and professionalism is needed. For example, it may not be appropriate for inexperienced volunteers to interview survivors of trauma or victims of abuse.

However, there may also be times when there's value in using volunteers, especially from the same cultural background. In which case ensure they are properly trained so interviews are of high quality. Also consider the gender or cultural background of those being interviewed. On certain sensitive issues, for example some health-related topics, you may need to match the gender of the interviewer and interviewee.

If you are working with volunteers in other roles, it might be helpful to recruit people with knowledge of a particular language, a local community or a specific issue. 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. Volunteers should also sign volunteer agreements – see our volunteers good practice guidance for more information.

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.

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.

Contact your local Heritage Fund team to see if they can put you in touch with other oral history projects or contact one of the Oral History Society's regional networkers.

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. The NCVO website lists safeguarding advice and training providers. If working with students or young people involve the school, college or youth workers as early as possible. 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, copyright, data protection, licensing and embargoes

Recording agreements

Two documents need to be signed by all interviewees. These will help you manage your relationship with them and help you comply with data protection legislation (including GDPR).

Interview Participation Agreement

An interviewee signs this before the interview starts. It 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.

Interview Recording Agreement

An interviewee signs this after the interview has been completed. It determines how their interview should be archived, made publicly available (in all or part) and potentially used to create publications, exhibitions, learning resources and other outputs. 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 Oral History Society has more information about GDPR and template agreements which you can adapt for your project.

Copyright

Future publication and reuse of interview recording 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.

Data protection

A public archive, museum or similar will also find it more straightforward to comply with data protection legislation. 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 that archives personal data ‘for purposes having public value beyond the immediate interests of the organisation itself’ is ‘archiving in the public interest’.

Licensing considerations

Our funding requires projects to ensure their digital outputs (including images, research, educational materials, project reports, software, web and app content, databases, 3D models, sound and video recordings) are freely available online for at least five years from the project completion date, accessible and where possible openly licensed – see our digital good practice guidance for more information.

However, it may not always be appropriate to use an open licence for content made available online.

Projects are encouraged to carefully consider the suitability of an open licence in relation to projects involving contributions by children, young people and vulnerable adults, material featuring children and young people, and interviews likely to contain extremely sensitive personal data such as illness narratives, traumatic experiences (such as conflict or abuse) and discrimination. Open licences apply in perpetuity, and future reuse may limit the ability of rights holder to redact materials. Where content is released under an open licence, the permission to do so should be carefully explained and obtained in writing. In practice it is difficult to predict in advance whether or not interviews will include such material. You should raise any concerns about these issues with your contact at the Heritage Fund as early as possible.

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

Archiving and embargoes

Finally, by its very nature, oral history involves people’s personal and confidential memories and experiences, and they will also talk about other people in their recorded interviews. Some of what they say will be sensitive (and in rare cases, libellous) and it might not be appropriate in the short term to share these parts of their interview publicly, such as making the recordings available in a public archive, on a website or in an exhibition. These parts of interviews can be safely archived but closed to public access (embargoed) for a period of years agreed with the interviewee. This allows you to make use of the rest of the interview and share it online or in other ways.

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 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 for more information. 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 of your project. 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 any costs that arise from archiving your recordings in your budget. 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 BS 4971:2017 conservation and care of archive and library collections (formerly PD 5454). There are also international standards for archiving audio-visual records – see guidelines on the production and preservation of digital audio objects for more information.

Backing up your recordings

During the project itself, before you archive the recordings, make sure 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 do it yourself using transcription software such as Express Scribe or Start Stop. Voice recognition software is improving but relies on good quality audio and clear unaccented English for good results. The best options can be expensive to use and may still require additional checking and correction.

Full transcriptions are not essential for archiving as long as there is a content 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 Audacity but there are better low-budget editing software packages, for example WaveLab or Sound Forge Audio Studio.

Budget

Make sure your budget covers all project costs. These will vary according to the number of paid and/or volunteer staff, how much training 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. The Oral History Society provides guidance on rates for freelance contractors based on different roles, as well as salaried staff. There are also nationally-agreed minimum pay rates for some professionals, such as archivists and museum staff. Seek further advice where necessary.

Equipment costs might include:

- solid-state flashcard audio recorders
- video recorders (DV) and tripod
- microphones (for example, lapel microphones, two per recorder plus spares)
- memory cards (SD) 8GB 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

- The Oral History Society for introductory advice, training, useful reading, helpful local and regional contacts
- The British Library Oral History Department has descriptions of its thousands of oral history recordings online and you can listen to the oral history recordings online or at the British Library.
- The UK Web Archive preserves websites and some social media.

See also:

- Oral History in the Digital Age
- British Universities Film and Video Council
- Scottish Oral History Group
- Scottish Life Archive

- Archives and Records Association
- Your local history society
- Your local archive