

# Oral History Best Practices

Four key elements of oral history work are preparation, interviewing, preservation, and [access](#). Oral historians should give careful consideration to each at the start of any oral history project, regardless of whether it is comprised of one or many interviews. This brief document presents the Oral History Association's guidelines for how to conduct a high-quality oral history interview; [\[1\]](#) it highlights some standard practices that should help produce historically valuable and ethically conducted interviews.

## Preparation

1. First-time interviewers and others involved in oral history projects should seek training, [\[2\]](#) whether they are conducting individual research or developing a community or an institutional project.
2. During initial preparation, oral historians should locate an appropriate repository [\[3\]](#) to house the project's finished oral histories and other documentation. Oral historians should take care to select a repository that aligns with the project's goals, has the capacity to preserve the oral histories, can enforce [\[4\]](#) any [signed agreements](#), and will make them accessible to the public.
3. Oral historians should outline an oral history process appropriate for their projects and their narrators. They should consult the complete suite of [Oral History Association Principles & Best Practices](#) documents for guidance, but whenever possible, the process should include the following: obtaining and documenting the [informed consent](#) of the narrator; when possible providing the narrator an opportunity to approve the oral history prior to public release; and sharing expectations about the overall project timeline. At this stage, the oral historian also should develop [forms](#) appropriate for documenting the process and related agreements.
4. Oral historians should choose potential narrators based on the relevance of their experiences to the subject at hand, while striving to identify and incorporate as many [diverse voices](#) as possible.
5. The process of engaging with potential narrators can be relatively simple and brief or involve multiple conversations. [\[5\]](#) The process typically entails two facets: first, describing the project and process and securing the informed consent of the narrator and second, holding a pre-interview discussion to assist in the interviewer's preparation. These meetings, regardless of their formality, are important in establishing rapport between interviewer and narrator and allowing for clear communication of the following elements:
  - a. The oral history's purposes in terms of topics to be covered and general research questions under study, and reasons for conducting the interview
  - b. The full oral history procedure, including when and how the interview will be recorded, a description of any review process, the plans for preservation and access, the potential uses of the oral history, and the need for informed consent and other legal forms to be signed
  - c. The narrator's expectations for the oral history—what they want to get out of the process, what topics are meaningful to them, and what questions they should be asked
  - d. When an understanding on how to proceed is reached, a formal record of that agreement should be completed prior to [\[6\]](#) the beginning of recording.

*Narrators, find out more about what to expect [here](#).*

6. In preparing to ask informed questions, interviewers should become familiar with the person, topic, and historical context by doing research in primary and secondary sources, as well as through social engagement with individuals and communities and informal one-on-one interactions.
7. Interviewers should create, when possible, a high-quality recording of the interview (audio or video format) to capture the narrator's interview accurately with consideration of future audiences and long-term preservation.
8. Interviewers should prepare an open-ended guide<sup>[7]</sup> or outline of the themes to be covered and general questions to be asked before conducting the interview. Interviewers should educate themselves about different interviewing strategies with the goal of encouraging the narrator provide the fullest responses to the questions as possible. (See interviewing section below for more details.)
9. Oral historians should recognize that their narrators are not just isolated individuals; they are members of communities, some of whom have historically complex relationships with researchers. When planning an oral history project, interviewers are advised to think about whether they want to engage with those communities in a formal, organized way. Oral historians may decide to develop a plan for community engagement that benefits both the project and the community. These plans for bringing communities into the oral history process might include the creation of a community advisory board, hosting events for sharing research findings, providing oral history training, and more.

## **Interviewing**

1. The interview should be conducted, whenever possible, in a quiet location with minimal background noises and possible distractions, unless part of the oral history process includes gathering soundscapes or ambient sounds.
2. The interviewer should record a lead-in at the beginning of each session. It should consist of contextual information,<sup>[8]</sup> such as:
  - a. names, or when appropriate, pseudonyms, of narrator and interviewer;
  - b. full date (day, month, year) of recording session;
  - c. location of the interview (being mindful to not list personal residence address, but rather generic "narrator's home"); and
  - d. proposed subject of the recording.
3. Both parties should agree in advance to the approximate length of each interview session. Given the unpredictability of the setting, however, the interviewer should be flexible and prepared for the session to be cut short, interrupted, or possibly to run long, if both parties agree.
4. Along with asking open-ended questions and actively listening to the answers, interviewers should ask follow-up questions, seeking additional clarification, elaboration, and reflection. When asking questions, the interviewer should keep the following in mind:
  - a. Interviews should be conducted in accord with any prior agreements made with narrator, and interviewers must respect the rights of interviewees to refuse to discuss certain subjects, to restrict access to the interview, or, under certain circumstances, to choose a [pseudonym](#).

Interviewers should clearly explain these [options](#) and how they would be carried out to all narrators during the pre-interview.

- b. Interviewers should work to achieve a balance between the objectives of the project and the perspectives of their narrators. Interviewers should provide challenging and perceptive inquiry, fully and respectfully exploring appropriate subjects, and not being satisfied with superficial responses. At the same time, they should encourage narrators to respond to questions in their own style and language and to address issues that reflect their concerns.
- c. Interviewers should be prepared to extend the inquiry beyond the specific focus of the project to allow the narrator to freely define what is most relevant.
- d. In recognition of not only the importance of oral history to an understanding of the past but also of the cost[\[9\]](#) and effort involved, interviewers and narrators should mutually strive to record candid information of lasting value to future audiences.

5. The interviewer should secure a signed legal release[\[10\]](#) [form](#), ideally when the interview is completed. It is important to follow the guidelines of the partnering repository's policy on this, if relevant.

## Preservation

1. Oral historians, [sponsoring institutions](#), and archival repositories should understand that planning for appropriate care and storage of original recordings begins with project conception.
2. Whenever possible and/or practical, oral histories—either individual or many within a project—should be deposited in a repository such as a library or archive that has the capacity to ensure long-term and professionally managed preservation and access. Regardless of where the oral histories ultimately reside
  - a. the recordings of the interviews should be stored, processed, refreshed, and accessed according to established archival standards designated for the media format used;
  - b. whenever possible, all efforts should be made to preserve electronic files in formats that are cross platform and nonproprietary;
  - c. the obsolescence of all media formats should be assumed and planned for.
3. In the interim before deposit, oral historians should
  - a. transfer the original recording from whatever device was used, make an appropriate number of redundant digital copies,[\[11\]](#) and store those in different physical locations, as soon as possible after any interview is completed;
  - b. document their preparation and methods, including the project's context and goals, for their own, the project's, and the repository's files;[\[12\]](#)
  - c. organize and preserve related material for each interview—photographs, documents, or other records such as technical or descriptive metadata—in corresponding interview files.

## Access & Use

1. In order to enhance accessibility of the audio or audio/video files, an [archive](#) should provide, when possible, written documentation such as transcripts, indexes with time tags linking to the recording, detailed descriptions of interview content, or other guides to the contents.

2. Whatever type of repository is charged with the preservation and access<sup>[13]</sup> of oral history interviews, it should
  - a. honor the stipulations of prior agreements made with the interviewers or sponsoring institutions, to the greatest extent possible, including restrictions on access and methods of distribution;
  - b. evaluate documentation, such as consent and/or release forms, and if they do not exist, make a good faith effort to obtain them;
  - c. take all steps practicable to abide by any restrictions set forth by the narrator, while also making clear that certain legal challenges—such as subpoenas or open-record requests—may make some restrictions unenforceable;
  - d. be prepared to provide timely access to material with considerations for expectations of narrators or project partners;
  - e. when possible, consult project participants on how best to describe materials for public access and use.
  
3. All those who use oral history interviews after they are made accessible should strive for intellectual honesty and the best application of the skills of their discipline. This includes
  - a. avoiding stereotypes, misrepresentations, and manipulations of the narrator's words;
  - b. striving to retain the integrity of the narrator's perspective;
  - c. recognizing the subjectivity of the interview, including, when possible, verification of information presented as factual;
  - d. interpreting and contextualizing the narrative according to the professional standards of the applicable scholarly disciplines;
  - e. contextualizing oral history excerpts;
  - f. providing a citation to the location of the full oral history.

---

[1] Before reviewing this document, please note: Many published and online sources offer further in-depth information about how to conduct an oral history interview. For more on finding the right guide for oral history see: Linda Shopes' list to [online web guides](#) and Barb Sommer's [reprinted from *The Oral History Manual, 3rd Edition* with publisher's permission] [bibliography](#)

[2] [OHA list of centers and collections](#) and [OHA list of regional and international organizations](#)

[3] Whether an institutional archive or a personal family archive. See more on the glossary term for [archive](#)

[4] For more on legal issues in oral history, see: <https://ohda.matrix.msu.edu/gettingstarted/playlists/legal-issues/>

[5] Or involve multiple layers of gatekeepers or proxy's before reaching direct contact with potential narrator.

[6] Although many oral historians prefer to request signatures for any legal release forms assigning rights to the interview after it is completed in order to better address any sensitive issues that may have come up during the course of the interview.

[7] Linda Shopes' list to [online web guides](#) and Barb Sommer's [bibliography](#)

[8] This is with an understanding that in some cases, such as interviews with vulnerable communities, particularly those with surveillance concerns, there will be a need to gather only the very basic contextual information.

[9] In this sense, the “cost” of a project is more than just financial, for example, good relationship building with the community will involve the “cost” of the emotional labor involved for the interviewer, project manager, and/or team members, in creating understanding and trust.

[10] For more on legal issues in oral history,  
see: <https://ohda.matrix.msu.edu/gettingstarted/playlists/legal-issues>

[11] <https://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/redundancy/>

[12] <https://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/metadata/>

[13] <https://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/access/>