

Archiving Oral Histories: A Practical Guide for Practitioners and Their Collaborators



Kenyon College

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Last Edited 8/2/18

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1. Introduction

1.1 Context for this Guide

A version of this document was initially created for the Oral History in the Liberal Arts (OHLA) initiative, supported by the Great Lakes ‘Expanding Collaboration Initiative’ and the Andrew W. Mellon Foundation, and made available under the title “OHLA Toolkit: Archiving Oral Histories from Start to Finish” (2017). The Kenyon library staff, in collaboration with Kenyon faculty, are now continuing to develop and expand it. While the primary audience is members of the Kenyon community engaged in collaborative oral history, it is designed with the hopes that it will be relevant to collaborative oral historians and their library and IT partners around the world.

In order to make this document as broadly relevant as possible, the technologies we name specifically are open source and freely available online, or low cost. Individual institutions may have access to a broad range of supportive technologies that we do not attempt to cover specifically, but mention in general terms for your reference and further research.

1.2 Technical Component of Oral History Projects

This guide takes a technical approach to educating practitioners (faculty, students, local historians) about the collection, processing, hosting, access, and preservation of oral histories. These technical processes are a critical component to an oral history project because they provide the means to project, share, and distribute the important work narrators and interviewers do. Therefore this guide works in conjunction with other professional guides that emphasize the development of historically significant research questions, and the ethical and legal considerations of the project as a whole. See for example, the [Oral History Association’s Web Guide to Doing Oral History](#).

We designed this guide specifically to assist with the “how tos” of creating, editing, organizing, transferring, storing, and archiving oral history files. Understanding the options for each of these steps will simplify your workflows and allow you to focus more fully on the research and pedagogical elements of your project. Collecting basic information like the spellings of names and place names during the interview can prevent mistakes and avoid time-consuming research later on. Appropriate file formatting will make the transfer, editing, and archiving of your interviews simple. Taking advantages of transcription and indexing software can save a lot of effort. If you intend to create a public-facing project or one that will be available long-term, knowing the availability and limitations of appropriate platforms and streaming services will frame how you accomplish that.

Below are some of the questions this guide will help you consider:

- What information should you collect with your interviews?
- What software will be used to transfer, convert, merge and clean a/v clips?
- Will the interviews be fully transcribed, partially transcribed, indexed, or some combination thereof?
- If you are creating an online collection, where will it go?
- Who will maintain that collection?
- What rights are associated with the interviews, and how will the documentation of those rights be stored?
- How long should the collection exist?

1.3 Ethical and Legal Considerations for Oral History

Oral interviews may enhance many different kinds of research. Many fields incorporate interviews: sociology, anthropology, political science, etc., and in each case the methodologies and practices for dissemination might be different. Therefore, it is critical for you as a researcher to consider the goal of your project and overarching methodology before you begin.

While the focus of this guide is technical, we believe that ethical considerations are imperative in oral history, and that it is incumbent on all of us who work with oral historians to educate ourselves on those considerations. We strongly recommend that you take a look at the [Oral History Association's Principles and Best Practices](#), and [Duke University's Ethics and Law guide](#).

If you are associated with an institution, consult with your IRB (institutional review board) to see if you need to go through their process. Oral histories themselves are exempt from the IRB process because the purpose of the interview is addressing a subject of historical significance. In oral history the interviewer and the narrator together have a common goal of telling a particular past. If your project has other objectives, or depending on what you plan to do with the interviews, you may need to gain IRB approval. If your IRB determines that you do not need to go through that process, you should still have a signed [informed consent form](#) and [deed of gift form](#) from each interviewee.

2. Data Collection

2.1 Research

Before setting out to conduct interviews, research gives you the context in which to understand the history you are collecting. Primary sources, such as diaries, maps, correspondence, census data, legal documents, genealogical information, and newspapers are indispensable resources for oral historians. While secondary sources analyze an event or interpret a creative work, primary sources provide the raw context of a historical event or situation.

Access to primary sources varies by type and institutional access. Kenyon provides [a guide to primary sources](#) available through the library to our faculty, students, and staff. Many primary sources are being scanned and made publicly available online, but many more exist only in physical form, in local historical societies and archives, or in private collections and homes.

Your research serves several purposes. It helps you develop and refine your interview questions to make them more insightful and relevant. It gives you knowledge of any potential ethical, emotional, or legal conflicts related to your topic, which might be a matter of physical safety for yourself or your community partners, depending on the nature and context of your interviews. Additionally, it can be used in conjunction with your interviews to present the oral histories to the public, whether you do this through traditional publication, a physical or online exhibit, or some combination thereof.

2.2 Planning for Archiving

The archiving process begins before you ever record an interview. Options for recording are virtually infinite; everything from computers to smartphones to tablets can record audio and video, and there are a myriad of attachable peripherals, as well as stand alone cameras. Because of the diversity of viable options we do not recommend specific recording devices. Section 3.2 of this document deals with the files you will want to generate, regardless of the recording device you use.

Whatever recording device you decide on, it is useful to test it, both before the interview, and in the environment where the interview is taking place. Poor recording quality, accidental cuts, and technical problems during the interview can cause major problems for transcription software and overall quality during the archiving process.

2.3 Starting the Interview

At the beginning of an interview, it is helpful for the interviewer to state the following information:

- Project title
- Name(s) of interviewee(s)
- Name(s) of interviewer(s)
- Location of interview
- Date
- A few words regarding the expected content of the interview

For example:

“This is Jenna Nolt with the Family Histories project, and I am here interviewing Jane Nolt on March 18, 2016. Jane is going to tell me about her experiences growing up in the rural Midwest in the 1930s.”

2.4 Metadata

Metadata is simply data about data. This guide uses it to mean *the descriptive information that keeps your interviews organized, making them easier to host, access, and preserve*. We created the [Interview Metadata Form](#) to easily capture this information during the interview process. This information will be useful wherever your interviews are archived. The basic information it captures is essential to creating a context for your project.

2.5 Expanding the Scope

Including certain kinds of specific information makes interviews more accessible to a broader audience. It also opens up the interviews to broader areas of study, as well as new and emerging research approaches.

- If the interviewee uses unfamiliar words or confusing phrases, ask them to explain the meanings.
- If the interviewee/interviewee uses unusual proper nouns (like names or place names), spell them out.
- Try to clarify things like place names, dates, etc.

This kind of information creates the potential for things like geo and chronolocation in online collections. It can also expand the relevance into areas like linguistics, folklore, digital humanities, and many others.

2.6 Supporting Materials

In addition to the interviews at the heart of oral history, most projects can benefit from supporting materials, which can be used to contextualize, enrich, and promote the project. If you are interviewing someone in their home, place of work, or other place that is important to their story, take notes about what is around you. They may share memorabilia with you, including things like photographs, letters, news articles, trophies, etc.

These materials might be introduced naturally during the course of the interview. If they are, it is good to be prepared with a scanner, camera, etc. Most smartphones will take a high-resolution picture, but be careful not to hold the camera at an angle if you are taking a picture of text or photographs. Portable scanners are another option.

3. Data Collection

3.1 File Transfer

There are several ways to transfer files from a recording device to a computer, depending on the recording device. Most cameras and smartphones come with USB/micro USB cords, which can connect directly to any modern computer. The files on cameras and smartphones are usually stored on SD cards or a micro-SD cards, which can be removed and plugged into some computers directly, or if not, through a card reader.

Some devices allow you to save files directly onto a cloud service, such as Dropbox, Google Drive, OneDrive etc. If your files are saved in cloud storage, you can access them through a browser on any computer.

It is important to note that depending on the length of the interview and the file format, video files can be quite large and take a long time to transfer. For Windows users, you can transfer large files more quickly and check the transfers for errors using the free utility [Teracopy](#). The Mac operating system has a better default file transfer program than Windows, so an additional program is not necessary.

3.2 File Formatting

Most recording devices have options for the type of file they are creating. Use AIFF or WAV formats for audio files, and AVI or Quicktime Movie formats for video files. For more information on preservation formats for A/V files, refer to the [Library of Congress guidelines](#).

Depending on recording equipment, format, and length of the interview, the recording might be automatically broken up into multiple files. This happens to prevent files from being so large that they are difficult to use. If this is the case, name them using the conventions in Naming Folders and Files below.

3.3 Naming Files and Folders

Recording devices automatically create folders and subfolders for your files as you create them, many of which are empty. Extract only the folder(s) containing your files, and rename them using the following conventions:

NameofProject_LastNameofIntervieweeFirstNameofInterviewee
For example: FamilyHistory_NoltJane

This folder should eventually contain all files generated by the George Booker interview, a completed copy of the Interview Metadata Form, and all associated IRB documentation, or a signed consent form and deed of gift form (see section 1.3).

File names are also automatically created. Rename them using the following conventions:

NameofProject_LastNameofIntervieweeFirstNameofInterviewee_Part#
For example: FamilyHistory_JaneNolt_Part1

Do NOT use spaces or special characters in your file or folder names. These conventions allow the file and folder names to be both human and machine readable, and each file will be individually identifiable, even if separated from the other component parts.

3.4 Backup

After renaming your files, copy them to another storage device, such as an external hard drive, cloud storage, or an institutional server. These backup files are important in case something goes wrong during the editing, upload, or access process.

Most colleges and universities provide some type of storage for faculty and students, however, the capacity and reliability varies. It may be network drive space, or expanded storage in a third party service like Google Drive. Network storage is can be good for storing large files like audio/video recordings because it is local, which means that it is typically quick to

upload/download large files to/from. Cloud storage like Google Drive will take longer to transfer, but is also a viable option. If you are unsure what your institution offers, contact your IT department.

3.5 File Editing and Merging

It may be necessary to cut parts of an interview. This could be due to a request from the interviewee, technical issues during the recording, or other issues. Recordings can also benefit from minor editing, such as noise correction. With video interviews, you might add a title screen, subtitles, and credits. As mentioned in the Naming Files and Folders section, larger files may be automatically divided up by your recording device, in which case you will need to merge them.

These things can be accomplished in any basic editing program. Some popular editing programs are described below.

[Audacity](#): Free audio editing software available on Windows and Apple operating systems.

[GarageBand](#): Audio editing software that often comes pre-installed on Apple operating systems. It can also be purchased for \$4.99.

[iMovie](#): Video editing software for Apple operating systems. Often comes pre-installed, can be purchased for \$14.99.

[Ocenaudio](#): Free audio editing software available on Windows and Apple operating systems.

[Windows Movie Maker](#): Free video editing software available on Windows operating systems.

The above products are well-established and relatively easy to learn. Tutorials for using them are easy to find online.

Professional options such as Final Cut Pro X, Camtasia, and Adobe products are also available, but they are expensive and typically have a steep learning curve. They are powerful tools intended for professional grade audio and video creation and editing and are generally unnecessary for basic oral history processing. Due to the cost and complexity, we do not recommend these programs unless you are already familiar with them, or learning them is part of your project.

4. Transcription & Content Processing

4.1 General Transcription Guidelines

Manual transcription is a time-consuming process. If you choose to transcribe without using transcription software, plan on it taking six or seven times the length of the interview. We provide a separate [transcription guide](#) for detailed help with formatting, but the basics are:

- Identify the interviewee(s) and interviewer(s) by their full names at the beginning of the interview. If any of this information is not available, use whatever information is available. If someone is not identified, call them Unknown. If you don't know the names of multiple people, call them Unknown 1, Unknown 2, etc.
- After the first identification, identify individuals by initials.
- Do not use quotation marks.
- Do not transcribe “um” or other meaningless filler noises.
- When someone laughs, coughs, or does a significant hand gesture like pointing, write it as (laughs), (coughs), (waves), etc. These can be integrated into the sentence, and include their own punctuation. If the expression comes at the beginning of the sentence, capitalize it within the parentheses.

4.2 Transcription Software

There are essentially three services that transcription software can provide:

- to streamline the process of manual transcription
- to automate the process of converting spoken word into written text
- to enhance manual transcriptions by adding new functionalities

Software for converting spoken word to written text is developing rapidly, and new products are constantly becoming available, but as of yet, there is no perfect solution.

[oTranscribe](#) is a free, open source web application that streamlines manual transcription. It puts the A/V file and the transcription in one window so the transcriber doesn't have to switch back and forth, uses hotkeys to rewind and fast-forward, creates interactive timestamps to navigate the transcript with, and automatically saves every second.

[Dragon](#) is a downloadable program that can be installed on your computer. Cost varies based on version and license. Dragon is intended primarily for dictation, and requires the user to set up a profile based on their voice during the installation. After the creation of the profile, files can be loaded into Dragon for processing. The challenge here is that Dragon “learns” and increases its

accuracy based on an individual profile's voice, which makes it less accurate for oral history transcriptions where there are multiple speakers.

The Oral History Metadata Synchronizer (OHMS) is free, open source software developed by the Louie B. Nunn Center for Oral History at the University of Kentucky. This innovative tool requires several pieces to be fully functional:

1. The [OHMS Application](#) is accessed via a username and password that you request from the Nunn Center. Here you can add metadata such as a title, names of interviewer(s)/interviewee(s), description, etc., as well as uploading an existing transcript, transcribing an interview within the interface, and/or “indexing” the interview. The OHMS Application does not store or stream the interview file. The interview file must be uploaded to a different service, and linked into the OHMS manager via a URL (see 2).
2. A software service to store and stream the interview from.
3. An installation of the OHMS Viewer (www.oralhistoryonline.org/tag/ohms-viewer/). This is free software that can be installed on 3rd party web host by you or your institutional IT department.

Although the OHMS Viewer has a URL that you can share your interview with, you may also want a platform, such as a website or institutional repository to display it in; see the Online Access section below for more information.

5. Online Access

5.1 Building an Oral History Website

There are countless software options through which you can upload and make files accessible online. It is important to distinguish between **streaming services**, which allow you to upload an A/V file and play it in a web browser, and website building software, which we refer to as your **presentation platform**.

Below are some popular streaming options:

[Internet Archive](#) allows you to upload all kinds of files, including audio and video, for free. It is a non-profit organization that archives information long-term, and for that reason, it is a good archiving option. There are no ads, but you cannot restrict access to your files, nor can you delete them yourself.

[SoundCloud](#) is a tiered audio streaming service. You can upload audio tracks for free, but ad-free listening requires a paid subscription.

[Vimeo](#) is a video streaming service that offers different tiers of access. It is less popular than YouTube (below), but you retain more control over your content, they do not put ads in front of videos, and you have a number of privacy options to restrict access.

[YouTube](#) is by far the most popular video streaming service. It's free, and capable of reach a wide audience, both through the YouTube site, and through the various "Share" and embed options that are easily accessible on the page for each video. However, you don't have much control over your content on YouTube. They can put ads in front of videos, and pull videos for any reason they deem appropriate. While YouTube can be a viable option for access and streaming, it is not recommended for digital preservation (see Digital Preservation section below).

Presentation platforms include blogs, websites, and online exhibits. They allow you to create a series of online pages, embed A/V files in those pages, and add other media like images and documents. Here are some presentation platforms that we have used, and can recommend:

[Blogger](#) is a simple, free tool that allows you to create a blog, and embed video or audio interviews within it.

[Google Sites](#) is an easy way to set up a free website.

[Omeka](#) is a free, open source publishing platform designed specifically for scholarly and archival content. While it's easy to use, the setup takes some IT support.

[Wordpress](#) is a popular website builder that has virtually infinite options. Cost depends on hosting and modules used.

5.2 Oral History Archives in Institutional Repositories

Another option for projects at Kenyon, and potentially projects associated with other institutions as well, is adding them to the **institutional repository**. Institutional repositories are online archives for collecting, accessing, and preserving the intellectual output of an institution. Most colleges and universities have them, but the types of materials they include vary by institution, and may or may not include oral histories.

There are several advantages to using IRs. They are typically optimized to be as findable as possible, which maximizes the visibility of your collection. In addition, your collection appears within the context of the institution's research, so users will recognize it as an academic, authoritative source. Many IRs will do your uploading for you, and at the very least will provide training and troubleshooting support. Additionally, collections are maintained long-term by the

institution, meaning you won't have to fix broken links, switch streaming services, or convert file formats to make sure your collections stays accessible over time.

The disadvantages of IRs are that they typically have less options than websites to customize the look and feel of your collection, and as mentioned above, not all institutional repositories can or will accept oral histories.

**We are always looking to improve our documentation. If you have questions that are not addressed in this document, or feedback on our processes, please contact Jenna Nolt, Digital Initiatives Librarian:
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