

Oral History Toolkit

Brief Overview

Recording an oral history is more than just sitting down with someone, hitting record, and asking them questions. It is a collaborative process where one's memories and experiences are collected and preserved in conversation between interviewer and interviewee. The toolkit below is intended to help guide you in this process, providing instructions and tips for equipment setup and video storage, pre-interview preparation, and successfully conducting the interview itself.

1) Equipment

In preparing to conduct an oral history, it is important to start at the basics: equipment. With the availability of technology today, recording an oral history interview will likely prove both easy and cost effective. Chances are, everything you need is already in the house – a computer, internet access, and Smart Phone. Here you need to decide what will work best for you and the interviewee. Do you wish to record the interview in video or just audio? And at what type of distance will the interview be safely conducted? Luckily, the variety of technologies today will be able to accommodate whatever both parties decide. Some options are explored in detail below.

Recording in Video Conferencing Platforms (Zoom, Microsoft Teams, GoToMeeting)

These video conferencing platforms have become widely used throughout the COVID 19 Pandemic and are perfect for recording an oral history interview at a distance. For our purposes at California Chronicles, there is no preferred platform as each allow open access and the ability to record the video session. Thus, we suggest for interviewers and interviewees to select the platform which they feel most comfortable.

- Computer Setup
 - Evaluate the computer setup of the interviewee. Video conferencing platforms use both a camera and microphone. Here, laptops with built-in cameras and microphones prove ideal. Tablets with the same are also a good choice. Desktop computers can be a bit trickier, as they often require plug-in cameras and microphones. Take stock of the equipment on hand and test it with the desired video conferencing platform.
- Internet Speed / Bandwidth
 - Video conference calls require a strong internet connection, as well as good Internet speeds and bandwidth. A quality video conference call and recording typically requires a minimum download/upload speed of 75/8 Mbps (megabytes per second). Search “internet speed test” on your device and run a few tests to check your speed. Note that fiber optic connections can have much lower bandwidth needs (around 25 Mbps.)
 - Helpful tips for improving your internet speeds and bandwidth
 - Close all other apps on your computers, as well as other tabs in your internet browser

- Disconnect or shut off other devices using the internet in the home, such as phones, televisions, and other computers.
 - If needed, select a time of day when more bandwidth is available. Some providers have a “party line” system where internet speed is influenced by the number of users in your area.
- Recording Instructions
 - While each video conferencing platform has its own unique interface, there are some general functions to recording a video call that they all follow.
 - The “host” of the meeting will control the recording and settings
 - The “host” of the meeting starts and stops the recording
 - In the Recording Settings, select “**Active Speaker**” mode
 - (This gives the full screen to the speaker)
 - In the Recording Settings, make sure the following are **NOT** selected
 - Timestamp Preferences
 - Display Speakers Names
 - Recording to “Cloud” or “Computer”
 - Most video conferencing platforms will give you the option of storing the recorded interview to either the “cloud” or your “computer.” Recording to the “cloud” requires the host to have a subscription with the platform of use. Recording to the “computer” can be done with no fee or subscription.
 - Note on Storage – When deciding between these two options, it should be noted that video recordings are large files. If you choose to record to your computer, you will want to make sure your device has enough storage for the recording.

Recording Video in FaceTime

For iPhone and Mac users, FaceTime is another option for recording your interviews at a distance. It does require, however, that both parties have Mac products. Moreover, while the recording could be done with the phone itself, it is preferable to use a Mac computer for such recordings as it provides a stable video frame. A FaceTime recording will use two apps on the computer: FaceTime and QuickTime.

- Computer Setup and Internet Speed
 - In many respects, FaceTime operates similarly to a video conferencing platform, using the video and audio of the computer, as well as internet. The same set of criteria of computer setup and internet speed (as discussed in the previous section) needs to be considered.
- Recording Instructions
 - Start FaceTime Call
 - Launch QuickTime from the Applications folder
 - Navigate to File and select New Screen Recording in the menu bar.
 - Alternatively, you can use Shift + ⌘ + 5.
 - Select to Record Entire Screen or Record Selected Portion and make sure your FaceTime window is within the frame

- Click to start recording
- To end your recording, click the stop icon in the menu bar
- Recording to Computer
 - A FaceTime / QuickTime recording will be stored on your computer. There is no “Cloud” option for this. So as discussed in the above section, make sure your computer has the storage space for recording.

Recording Video via Smart Phone

The video capability of today’s Smart Phones nearly equals that of a high-quality video camera. And if other recording options are not feasible, and an in-person interview is deemed safe, then a Smart Phone is a great option.

- Video Frame
 - Similar to a video camera, a Smart Phone will require a stand to keep a steady frame for video recording. With the video and camera features of Smart Phones becoming widely used, there are a number of stand options available.
- Environment
 - Creating a suitable recording environment will be discussed in more detail below. Here it is important to note that recording with a Smart Phone may present additional challenges, namely that the phone’s camera and microphone are situated at a farther distance from the interviewee than one’s computer during a video conferencing call. Lighting and audio should be tested beforehand and adjusted as needed. A quiet, well-lit environment is highly recommended.
- Storage
 - A one-hour video recording will require about 3.6 GB of storage space. Most Smart Phones can easily handle this file size without an issue. That said, make sure the Smart Phone being used has enough space available.
- Safety Protocols
 - Although COVID 19 vaccines are becoming more widely available, in-person interviews can still pose a risk to both interviewer and interviewee. It is recommended that standard safety protocols such as social distancing and wearing masks before and after the interview be observed. Discuss such protocols with the interviewee and decide a plan of action with which both parties are comfortable.

Recording Audio Only via Smart Phone

There are times when video recording an interview is not desired by the interviewee. Perhaps they are camera shy or self-conscious about being video recorded. In these instances, an audio only recording is a good second option. And here a Smart Phone can offer an easy and accessible solution.

- Recording Apps
 - There are number of third-party recording apps available for the Smart Phone, many of which are either free or low-cost. We recommend you

conduct your own research online and find the one that best fits your needs, as well as the model of phone being used for the interview.

- Environment
 - Similar to video recording, a quiet environment is highly recommended. Most Smart Phones have high quality microphones. It is recommended, however, that you conduct audio tests beforehand to situate the phone in the best position possible for the interview.
- Storage
 - Audio files are much smaller than video, which makes storage space less of an issue. A one-hour audio recording, for instance, requires only about 350MB of storage. That said, one should make sure that plenty of storage space is available on the phone prior to recording the interview.

2) Pre-interview Preparation

Once you've settled on the equipment to be used, you can now turn your attention to preparing for the interview itself. As stated earlier, oral history is a collaborative process between the interviewer and interviewee, and that collaboration begins well before the record button is pressed. In an oral history, interviewees are asked to recall events, feelings, and experiences that likely happened many years—if not decades—in the past. This recall process can sometimes be both difficult and overwhelming for individuals, which is why it is important to have pre-interview discussions with the interviewee about the scope and content of the oral history. Such discussions will not only significantly aide the interviewee in the recall process, but also help you, the interviewer, in preparing to conduct the oral history interview. Below are some tips for this pre-interview preparation.

- Topic selection
 - The California Chronicles Project is asking for residents of the state to discuss and share an event or events that profoundly impacted and changed their lives. Examples of these could be:
 - Surviving a traumatic event and pushing forward
 - Overcoming obstacles
 - Achieving a goal through determination and hard work
 - An experience that gave you a new perspective on life
 - A moment or event that made you believe in yourself and/or others
 - An experience you're proud of
 - Sharing something inspirational
 - Have a broad discussion about the interviewee's life. This will help with the memory and recall process, allowing them to relive and articulate moments of their past. Likely you'll come across a lot of events that fit the above criteria. And to be clear, the oral history does not have to focus on just one singular event.
 - Reassure the interviewee that their experiences matter. Many people have the misconception that only high-ranking officials such as governors and CEOs are worthy of oral histories. This is NOT TRUE. Everyone has stories to share that are inspiring, important, and help us understand the past.

- Ultimately, this broad discussion will help the interviewee with the memory process and allow them to settle on the story or stories they wish to share.
- Accessing the Memory Bank
 - Opening the Memory Flood Gates can be overwhelming. A pre-interview discussion allows this process to unfold comfortably and without the pressure of being recorded.
 - The interviewee may initially struggle with getting the sequence of events in correct order. In these cases, be patient and let them work it out. The last thing you want is for them to get frustrated. An oral history should be an enjoyable process. Reassure them that there is no need for them to put pressure on themselves—there is plenty of time to get things ironed out.
 - Use memory aides to help with the process. Having them talk with friends and family members, look at pictures, listen to music, and even read about the time period of focus can all be useful tools in the recall process.
 - Note – these memory aides can also be used by the interviewer for their own research. The more the interviewer knows about the topic and time period under discussion, the better prepared they will be in guiding the interviewee during the oral history with follow up questions.
- Identifying Sensitive Areas
 - Pre-interview discussions can also help identify sensitive topics to avoid. A person’s memories are a mix of good times and bad. Hence, the recall process can bring up traumatic events that they had buried and not thought about for a long time.
 - Such discussions will let the interviewee grapple with those memories and the emotions they bring to the surface off camera. The discussions will also allow you to make note of those sensitive areas and proceed accordingly in your interview.
- Make an Outline for the Interview
 - The pre-interview discussion will enable you to create an outline for the interview. This outline is not a script, but more of a roadmap that charts the areas of discussion.
 - The interviewer should use the outline as their notes during the interview. The outline can detail the sequence of events, the related topics to be discussed, and even the follow up questions they wish to ask.
 - The outline can also serve as an anchor for the discussion. It is not uncommon for an interviewee to go “off course” and discuss a related detail to the story they are telling. Here, the interviewer can let them go in that direction and use the outline to bring them back to topic when they are finished with the side story.
 - The outline can include questions to help the interviewee share their story. Have most of the questions be “open-ended” that prompt the story. These are questions that typically start with “How”, “Why”, “Where”, or “What Kind of...”
 - Share the outline with the interviewee for them to review. This is part of the collaborative process, allowing the interviewee to have a voice in what will be discussed and asked in their oral history. Such transparency will

also give them comfort in the fact that there will be no surprises in the interview—they have a roadmap where things are going.

- Sample Outline
 - Slate the Interview
 - Name of Interviewer; Name of Interviewee; Date; Location; Interview for California Chronicles Project of the State Department of Aging
 - Tell us a little about yourself
 - When and where were you born?
 - Where did you grow up?
 - Where did you go to school and what career(s) did you pursue as an adult?
 - Tell us a little about your family
 - Discuss your family origins and makeup
 - Anything you'd like to share about your parents and extended family
 - Tell us about an event that profoundly impacted and changed your life
 - Have some follow up questions ready to help move the narrative along. (This is where your pre-interview discussions and research comes in. Below are just some general questions as examples.)
 - What year did this happen?
 - What was going on at the time?
 - What did your family say / feel about this?
 - Follow up questions at the end
 - How did this change your life?
 - Why did you want to share this?
 - What do you hope people take away from this story?
 - Any final thoughts you'd like to share before we end?

3) Interview

With all preparation complete, both interviewer and interviewee should approach the oral history with comfort and confidence. The equipment and mode of recording has been arranged, the topics of the interview have been thoroughly discussed, and an outline for the interview has been created and reviewed. Below are a few steps to help guide the interview.

- Interview Schedule and Equipment Setup
 - Schedule interview with interviewee
 - If using video conferencing platform, you should schedule a “meeting” within the system for the desired date and time. This will provide both interviewer and interviewee with a specified link for the interview.
 - Follow up with interviewee a day or two prior to the interview to make sure the date and time still works for them
- Test Your Equipment

- Whatever mode of recording you and the interviewee have agreed upon, make sure to conduct an equipment test before the interview.
- An equipment test will also allow you to practice the recording instructions provided for the specific platform and/or mode you are using.
- Create A Controlled Recording Setting
 - A quiet and well-lit recording environment is desired for the interview, no matter the mode of recording being used. If recording at a distance via a video conferencing platform or FaceTime, you will have to communicate with the interviewee in regard to the environment. This may require them turning on more lights, or addressing disturbances and ambient noises on their end.
 - As referenced earlier, internet speed / bandwidth will affect video conferencing and FaceTime recordings. Remember to take the necessary steps so that both parties have stable connections and adequate internet speed / bandwidth.
- Hitting Record
 - Be sure to give notice before hitting record to make sure the interviewee is ready. Remember that the recording can be paused at any time if needed and communicate this with the interviewee.
- Whose Voice and Active listening
 - Avoid the “uh-huh!” In a conversation, it is a common practice and curtesy for one person to affirm what the other is saying with a nod of the head and the colloquial “uh-huh.” In a recorded oral history, however, one’s “uh-huh” interferes with the story being told by the interviewee.
 - Offer affirmation through active listening instead. Here you can still provide the interviewee with curtesy and support that you are listening through body language, such as smiling, nodding, and positive motions, all of which can be done silently.
 - The interviewer may consider using the mute function when the interviewee is speaking on video conference platforms and FaceTime. This will go a long way in eliminating unintentional noise in the recording.

4) Make A Preservation Copy of the Recording

Once the interview is complete, it is important to make a backup copy of the recording. While the raw video / audio file may seem safe in the cloud or on the interviewer’s computer / phone (depending on the mode of recording), none of these are fail-safe. The cloud storage of video conferencing platforms will automatically delete recordings after a specified time limit, just as computers and phones are prone to hard drive crashes and other mishaps. Making a backup copy of the recording ensures that the interview will be preserved. Below are a few suggested ways to store the raw video/audio file.

- USB Storage Drive / External Hard Drive
 - Like other venues of technology, a USB storage drive or external hard drive are easy and accessible ways to store the interview. They are cost effective and contain more than enough storage for video and audio files.

- Once a preservation copy is made, be sure keep the storage drive or external hard drive in a safe place.
- Personal cloud base storage
 - While the cloud storage of many video conferencing platforms have a time limit, one's personal cloud storage can be easily maintained for perpetuity.

5) Interviewee Review

It is common courtesy in oral history to have the interviewee review the interview recording. This allows them to voice any concerns and/or suggest changes before the recording is made public and/or shared with others. Be sure to share the video / audio file with the interviewee and get their approval.

6) Upload to Site