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Taking a Step Back:

**Guidance for Determining Oral History
Project Goals and How to Reach Them**

Collaborators

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As the University Archivist for the City University of New York (CUNY), Natalie Milbrodt's responsibilities include coordination and planning for archival preservation and records management across the university's 25 campuses. She serves on the Oral History Association's Metadata Task Force and as an advisory board member for the New York State Archives.

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Kristin Morris is the Cisco Archivist at the Center for Cisco Heritage, a unique project of the Computer History Museum and Cisco. She has 20 years of experience managing and executing oral history and storytelling projects in a variety of institutions. She serves on the SAA Oral History Section Steering Committee.

Before we begin...

What is an oral history project?

- **Mission and scope:** it's *about* something and has definitional parameters
- **Employs informed consent:** narrators have a say
- **Has a life cycle:** even if informal, there's a plan for future of the interviews

Everyone's got a great idea...

But as the archivist, you have to manage the long tail of an oral history project.

The first question we must ask, "What are our goals?"

Let's talk more about this project...

What are our goals? / What is the desired final product?

Who is this for?

How long do we have to do it? What resources (\$, human, facilities, etc.) are available / needed?

Are there existing projects that cover the same ground or that we could contribute to instead of starting something new?

What are we trying to do?

Is our goal to reduce social isolation?

Organizing public programs, discussion groups (in-person, by phone, or online), writing workshops, or mentoring initiatives work great

Is our goal to reach a marginalized or under-represented group in the communities we serve?

Collection audits, open houses, classroom visits, and tabling at local events, can all work to establish relationships of trust with new groups before launching into a more involved (and possibly extractive) project.

What are we trying to do?

Is our goal to positively respond to important stakeholders?

Let's discuss what oral history entails, and explore whether a “story gathering” or other narrative project might be appropriate.

Is our goal to commemorate an important event or milestone?

Social media campaigns and public talks with key stakeholders engage different types of audiences; story gathering at events; generate excitement about the anniversary.

What are we trying to do?

Is our goal to produce a high quality communication?

A journalistic or artistic approach might be more appropriate. We can conduct interviews long enough to capture pull quotes with no expectation of giving them an archival afterlife. Spend resources on boosting production value as high as possible.

Is our goal to develop material for a specific exhibit venue, educational setting?

Plugging into existing curriculum and programming can seamlessly integrate existing collections and initiatives into new contexts

What are we trying to do?

Is our goal to fill a gap in our collections?

Community archiving, outreach, canvas other institutions, oral history project

Is our goal to create a robust program of ongoing collecting, management, and public access to long-form personal narrative/biographical interviews?

Oral History! But do we have what it takes????

Let's talk more about this project...

What are our goals? / What is the final product?

Who is this for?

How long do we have to do it? What resources (\$, human, etc.) are available?

Are there existing projects that cover the same ground or that we could contribute to instead of starting something new?

Who is this for?

Do they want it?

Who are the stakeholders and how do they relate to one another?

How do you relate to them?

Do We Have the Right People Involved?

Institutional resources: archivists, exhibit curators, educators, internal volunteers, institution funders, board members, etc.

External resources: Enthusiasts/interested folks, researchers, “field experts,” external volunteers

Let's talk more about this project...

What are our goals? / What is the final product?

Who is this for?

What resources are available? (\$, human, time, institutional support, etc.)

Are there existing projects that cover the same ground or that we could contribute to instead of starting something new?

Oral Histories require lifetime care and feeding

Time: Each interview = 30 hours of labor.

Human

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Institutional support

If Oral History is the best method:

What is our mission?

Who are the stakeholders in this project and what are their roles?

Who do we interview?

What do we ask them?

How/when/where will we interview people?

What happens after the interview?

What are the long term housing and access issues we should consider?

Mission

“Project mission statements vary in length and detail but all serve one basic purpose - to describe the project design for everyone involved in the project and for future users of the interview information.” p.54 *Planning a Community Oral History Project*, Sommer, MacKay & Quinlan

A mission statement will include:

- Project name
- Goals
- Focus
- Scope
- Statement of adherence to oral history standards

Who are our stakeholders and what are their roles?

Map all stakeholders and consider each party's

- Ownership
- Responsibilities
- Rights

Note what skills and resources are missing. Who can we invite to fill these gaps?

Who do we interview?

- What is our rubric for selecting narrators?
- How many people can we realistically include?
- Do we consult narrators for additional narrators?

What do we ask?

- **Determine scope:**
 - Time periods
 - Geographic
 - Topical
 - Topics to avoid
 - Required vs optional topics
- **How much do we workshop these questions with each narrator?**
- **Are there ways we want to ask about certain topics? Language we want to use?**

What happens after the interview?

- Will we create transcriptions? If so, how?
- What constitutes a complete submission package?
- Where does it go?
- What goes back to the narrators for review and for them to keep?
- What is the workflow for archival processing and preservation?

Long term housing and access

- What commitments for long-term stewardship are needed?
- How do we determine levels of access?
- How will we answer future use requests?
- Who is ultimately in control of the interviews and their use?

Oral History Association

<https://oralhistory.org/archives-principles-and-best-practices-complete-manual/>

Resources

University of California-Irvine Oral History Tool Kit

One-stop shopping for all your oral history needs!

<https://oralhistory.lib.uci.edu/>

Including Oral History Project Plan worksheet:

https://docs.google.com/document/d/1T32zyloz20MeoN_kxT95rfLN-1KOECE/edit

Narrator/Interviewer Agreement:

<https://docs.google.com/document/d/1bOnhdePeL1PLFTJMXgr4OZHic2GnhZ6n/edit>

Boston Research Center Oral History Toolkit

PDF format; includes project planning templates and forms

<https://bostonresearchcenter.org/wp-content/uploads/2021/06/BPLBRC-Oral-History-Toolkit.pdf>

Claremont Colleges Library Oral History Toolkit Forms Library:

<https://libguides.libraries.claremont.edu/ohtoolkit/forms>

Community/Personal Archiving Resources:

https://docs.google.com/document/d/1vN3b4Cu0SZ_r0p4zon0006I1gHV7xfDevelWo_TbroA/edit?usp=sharing

Oral History in the Digital Age - essays on every possible topic!

<https://ohda.matrix.msu.edu/essays/>