Oral History for Texans

Second Edition

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Chapter 4
Organizing Oral History Projects

Successful oral history projects usually start with advance planning. As great a concept as oral history is, the objectives discussed in Chapter 3 will elude most local historians in Texas unless they carefully build and carry out plans for tapping the rich memories of their interviewees.

IDENTIFYING AND SETTING GOALS

Every local history project needs agreed-upon goals. Without them, local historians will probably not experience or sense accomplishment.

Why should Texans set oral history goals? They should do so for the obvious reason that the selection of goals will require local historians to contemplate where they are now, what they want to accomplish, what has been done b others, and how they might reach their current objectives. Goal-setting also causes local historians to set limits and imagine what solutions might be needed to overcome some of the inevitable problems to be anticipated in their projects.

In a state as large and as diverse as Texas, both personal and group-sponsored oral history projects need the discipline that comes from goal-setting. Like many other places, Texas is fascinating to its residents and lends itself to comments such as, "There are so many interesting people and subjects for oral history in Texas that I simply don't know where to start!" The ultimate goal of the local historian may be to interview *everybody* about *everything* they have experienced in life, but this is certain to remain an elusive, if worthwhile, goal. Texans need oral history goals that are realistic as well as challenging and inspiring.

Steps leading to worthy, achievable goals for Texas-related oral history projects may be briefly outlined. Common sense—and the knowledge that oral history materials will be judged by their future users—dictate a thoughtful approach in advance planning. Before setting goals, a series of primary questions should be asked:

1. What are the basic aims of the oral history project?
2. How will the community (or others) likely view the project while it is taking place? After it is finished?
3. Who will use the tape recordings and/or resulting transcripts in future years?
4. How will use be made of the project's resulting oral memoirs?

Next should be the setting of intermediate, or mid-range, goals. Questions such as the following should be considered:

1. What is needed (funds, equipment, people) to reach the oral history project's larger goals?
2. What aspects of the project's goals are unrealistic? Should some goals be postponed or eliminated?
3. What are our group's principal assets—its talents, strengths, experience, insights, and other positive features? What are our limitations—-our weaknesses, inabilities, obvious negative traits that should be considered early in the project?
4. When can we reasonably expect to complete the project? What is our time frame? How much can we accomplish in a reasonable period of time? Should this factor cause us to refocus our goals again?

Detailed planning is the final step in goal-sctt1ng. Local historians should move deliberately from *talking* about general goals to *setting down* achievable tasks. After narrowing the oral history project to a few reachable goals, (probably three or less) the following simple procedure may serve well:

1. Write out both general and specific goals.
2. Involve a group or committee in formulating all of the project's goals.
3. Set down on paper the oral history project's "givens"—deadlines, financial limitations, and other factors certain to affect the results.
4. Make lists of assignments for those who will be responsible for the project. Rank, in descending order, each person's priorities and tasks.
5. Devise a checklist to be used later in evaluating the project. Use it at several intervals during the project to determine if it is on track.
6. Throughout the project, encourage each worker to discuss and think about the adopted goals.

No oral history project will succeed merely because it is based on a good idea. Goal-setting will cause local oral historians to question themselves as well as their interviewees. Success should be expected each project will need a "road map" and frequent checks to determine if its participants are on course, [29]

GENERAL SELECTION OF ORAL HISTORY SUBJECTS

Part of the local historian's planning should he an approach to the community in which oral history interviews are to be conducted. Three questions take on great importance at this point:

1. How should the concept of oral history be explained to a community?
2. Given the large number of subjects available for oral history study, how do local historians select and narrow their choices?
3. Should a local oral history project focus mainly on recording life histories, or should it strive to record interviews of clusters of people, all recalling similar events, eras, or circumstances? Should there be a mix of these types of interviews?

The concept. The first of these community-related questions begs another: To what extent does successful oral history work in a Community depend on good public relations? The answer lies partly in an organization's efforts to inform people about local historical activity and partly on the methods used in announcing the beginning of a project. An oral history project's planners—a Texas county historical commission, a sesquicentennial committee, a museum, a public library, a college academic department, a secondary school, or a community organization—should begin with a news release through the local media describing the project. The print media (newspapers, shoppers' guides, newsletters) can be very important to a project's success: it may be the most effective means of spreading news of its formation, its positive developments, and its completion. Photographs of people being interviewed, along with narrative descriptions of the project, may stimulate community-wide interest and result in a surprising number of helpful suggestions from readers. Radio and television public service announcements should also be used, and organizers of oral history projects should either volunteer to appear on or cooperate with both local radio and television talk shows. If the tapes and / or transcripts of an oral history project are being deposited in a local library, news of their scope and purpose can be carried in published reports of the library's activities. Civic groups publishing newsletters should be requested to print news about local oral history projects. For the community with a daily newspaper, perhaps the best outlet for announcements is the special weekly section on local activity.

Whatever outlets are chosen b the local history group, its oral history emphasis should be described as a *planned project*—one aimed at gathering and preserving a portion of the community's rich heritage. The value of the memories and organized reminiscences of local citizens should be emphasized. Sponsors should communicate the project's potential benefit to the community as a whole. Both interviewers and

interviewees are likely to enjoy oral history, and a project's sponsors should emphasize the social benefits that often come when people sit and talk quietly about the past they have known. Oral history is something of great interest that a community can do—together—about its history. Encourage the community to take pride in its oral history projects.

Identifying subjects. Selecting subjects for an oral history project will require patience, a general understanding of the community's historical development, and the setting of priorities. Because there are few living Texans whose recollections extend beyond 80 years. an oral history project may he limited somewhat to the study of its community in the 20th century. Project planners should analyze the present community: What are its oldest institutions, businesses, and government units? Who are its oldest families? What forces have shaped the community—-such as wars, natural disasters, economic conditions, immigration patterns, national events, and fame: fortune? What is the single-most important event, turning point, or factor in the community's history? Each community's uniqueness should be a guiding factor.

Community historical analysis will lead both to the narrowing of general subjects and to the number of people available for oral history study. At this point project planners should locate, identify, and become familiar with printed and other more conventional sources (such as photographs) already available on the subject(s) being considered for oral history. 'What is already known? 'What are the gaps in the community's known history? What does the sponsoring group seem qualified to study, given the possibility of several appropriate and available oral history subjects in the community? Even tentative answers to these questions ill help the project's sponsors move toward success.

Types of interviews. Most oral history interviewing falls into two categories: (1) life-review interviews and (2) subject-oriented interviews. The first type of interview endeavors to survey an informant's life and addresses a wide range of subjects—family, education, religion, employment, community, and others. Life-review oral history interview usually proceeds chronologically, moving from the topics of family and childhood to the present, with the interviewer guiding the respondent through a series of agreed-upon topics. Several interview sessions are usually required to produce a satisfactory life-review. One of the most striking characteristics of this type of historical interview is its attention to tracing the respondent's progress through life, including both triumphs and problems. Not surprisingly, this type of interview often gives much personal pleasure to the respondent, who may later comment on how "good" the life-review made him her feel. Students of gerontology, during the last 20 years, have begun to give attention to the emotional encouragement felt by many older citizens who participate in oral history interviews.

The second type of oral history interview contains some aspects of the life-review, but it is best seen as a separate category: the subject-oriented interview. It is usually more narrowly focused than its counterpart. The subject (or subjects) is stated at the start of the interview, perhaps during the interviewer's introduction, and the informant is asked to reconstruct from memory that portion of the past that pertains

to the subject of the interview. The subject-oriented interview may be further understood by examination of its sub classifications:

a. One in a series/one respondent. The interview may be one in a series with the same respondent recalling a topic.
b. One n a series/multiple respondents. The interview may be one of several on the same topic(s) by several or many respondents.

In both of the above subtypes of interviews, the respondent is asked to describe events, people, or other subjects more narrowly focused than the subjects in a life-review. One of the most noticeable features of the typical subject-oriented historical interview is that the informant has less freedom to comment on unrelated topics. The interviewer will usually provide gentle reminders of the agreed-upon subject throughout the session, such as. “Mr. Jones, how did what you just told me relate to the Panhandle dust storm you earlier described?” Large, comprehensive oral history protects will probably include more life-review interviews than the projects of small organizations, which will almost naturally begin with the subject-oriented interviews on topics readily defined. [30]

ELITES AND NON-ELITES

Much has been written about elite and non-elite interviewing. As the planners of a community oral history effort begin selecting persons w ho will be invited to be interviewed, hard questions will arise on this subject. To whom do the oral historians in the community have access? Should the project include both elites (successful, prominent, and or wealthy persons) and non-elites (ordinary citizens who seldom receive much social recognition)? How will the oral history project’s results be affected by its respondents’ social class identifications?

There is great potential in both elite and non-elite oral history interviewing. Affluent interviewees may be able to offer unique insights into a community; what is important here is that an oral history project should also include the historical recollections of ordinary citizens, approach some of local history “from-the-bottom- up,” and avoid some of the criticism that has attended many earlier oral history projects. Studies have shown that elites view their own lives, and the lives of their communities, in ways that sometimes defend or justify their personal leadership roles. Some oral history projects may focus only on elite groups (a community’s living former mayors, a church’s leaders, or the executives of a company) and work to document those groups’ personal histories related to specific topics. The great challenge at the community level is for local historians to seek out and include the oral memoirs of non-elite persons, who may give accounts of local past events that are often equally as important and interesting as those offered by the community’s leaders.

Oral history provides a moment frozen in time, a recollection often available from no other source. (Photo from The Center for Transportation and Commerce, Galveston.)

Only local folklore topics may lack the presence of both kinds of potential interviewees. Folk subjects in a community, by definition, may be so common to the entire population that they have no recognized leaders / elites. However, some folk subjects, such as folk medicine, will have clearly established leaders in a community and this may give the impression that both elites and non-elites exist for those particular folk subjects.

If oral history has great value in recording the past for people who may never write their own histories, perhaps local historical groups should emphasize the interviewing of non-elites in the community. This emphasis will require careful analysis of the community's existing historical documentation and some insistence that it may be time to study some of its neglected subjects. Oral history projects that include the community's leading citizens of the past several decades will almost certainly occur, and well they should; the enormous challenge of oral history is to include the "forgotten" people of the community in the gathering of its collective history. [31]

INTERVIEW STRUCTURE: LIFE-REVIEW MODEL

Once a community's oral history topics have been selected and some of the people who will be invited to participate as informants have been identified, local researchers will inevitably commence the process of structuring the first interviews. It is not enough for the local historian to know how to operate a tape recorder and have more-than-passing interest in the project's subject(s). Formulating each interview's structure is the next step. a natural outgrowth of earlier planning.

Each oral history project of the life-review type will be unique, making it difficult (even unwise!) for the oral historian to develop a long, standard outline that can be used in chronicling the life of every local citizen. There are, however, topics common to most people's lives and the local historian should at least consider including them. Remember, a life-review oral history will require several recording sessions and several hours to complete. Much frustration on the part of both the local historian and the prospective interviewee can be avoided if the two collaborators realize early that life-reviews take much time and patience. The typical life-review oral history may focus on the following topics:

1. Formative years (youth):
   a. Birth, family, and home circumstances
   b. Geographical setting the family lived
   c. Preschool activities
   d. Religion as a factor in the family
   e. Education (locations, teachers, academic progress. outside activities, school friends)
   f. Community life (local customs, special interests, entertainment, local economy, populations)

g. General experiences (travel, family, friends, early work experiences. family and community health, seasonal experiences, local humor, personal : community catastrophes)

2. Mature years (adulthood):
   a. Completion of formal education
   b. Military service (where stationed, duties, basic training, travel, overall attitude toward military duty)
   c. Job, career development (how selected, changes and transfers, problems and achievements, professional organization memberships, relationships to general economy, descriptions of actual work done)
   d. Family development at adult level
      i. Selection of spouse and marriage
      ii. Children
      iii. Family finances (sources of support and how income was spent)
      iv. Housing development (renting. owning. building homes)
      v. Relocating the family (moving to new towns or farms, effects on the family)
      vi. The family in the neighborhood(s)
      vii. Roles of adults in the family
      viii. Leisure time activities (travel, entertainment, hobbies, sports)
   e. Religion, social groups, and civic activity
      i. Church: synagogue activity
      ii. Membership in local organizations (clubs, fraternal bodies, societies)
      iii. Civic work (PTA. volunteer work, political interests, service in elected positions)
   f. General adult experiences (pivotal events in community'. reactions to national and international affairs, effects of natural disasters)
   g. Retirement from employment (attitude toward, noticeable changes in lifestyle. new activities assumed, how view of earlier life experiences is affected, financial arrangements during retirement years)

During a series of life-review oral history sessions, an alert interviewer will probably encounter numerous opportunities to pose questions about the interviewee's genealogy, attitudes toward recollected social changes, the impact of changing technology, local folklore and customs, and other topics very familiar to the informant who has been a keen observer of both immediate and larger social circumstances. Conducting a life-review series is invariably a major challenge. The potential problems are many, hut the potential benefits almost always outweigh the problems and are enough to prompt even the most inexperienced of local historians to try this form of oral history activity. [32]

INTERVIEW STRUCTURE: SUBJECT-ORIENTED MODEL

The subject-oriented, or topical, oral history interview is easier to outline than the life-review type for the simple reason that the former has a narrower focus than the

latter. In the subject-oriented interview the oral historian and the respondent have usually agreed upon a topical outline to be followed, or at least a few topics to be discussed. in this type of interview, the interviewer does not usually give the respondent as much latitude to discuss life in general as would be allowed in a less structured interview. From the outset it is understood that the interviewee has firsthand knowledge of the subject being discussed and that the interviewer will move rather quickly to the subject at hand. The subject-oriented interview may be used in the middle of a life-review series to explore the informant's detailed knowledge about a particular event or subject from the past. When this situation occurs, the oral historian usually proceeds with one or more funnel-shaped sequences of questions—all of them asking the informant to recall and reconstruct word pictures of a significant subject identified either by the oral historian, the informant, or both persons.

To illustrate how the general outline for a subject-oriented oral history interview might be formulated, the following interview model is based on a hypothetical historical development in a hypothetical, but typical, Texas community:

The setting: A Central Texas small town (Middleville)

The lime: The 1920s

The event: The opening of the first automobile dealership in the county

By common consent, the Middleville Junior College, the Middleville Public Library, the Junior Historian Chapter of Middleville High School, and the Middle County Historical Commission work to carry out an oral history project whose aim is to document the impact of the first automobiles on the lives of the people of Middleville and its surrounding area. Members of the community interested in local history—librarians, teachers, students, historical society leaders, and others—decide to augment existing newspaper, photograph, public record, and other sources with oral history interviews with citizens who can recall the circumstances during the opening of the new automobile business in 1925 and some of the changes in community life that followed. Students from the high school and the college agree to conduct tape-recorded field interviews, the county's historical commissioners serve as both project planners and interviewers, and the library agrees to process and preserve the oral memoirs of all who are interviewed. Within a few weeks, a list of potential interviewees emerges, including the names of the first automobile business's original co-owners, one of the original salesmen, two local automotive mechanics from the 1920s and 1930s, several town merchants, several early purchasers of automobiles in the town, several persons who were children in the town when the business first opened, and several persons who were employed by other local transportation

businesses during the l920s. After arriving at realistic goals for the Middleville Oral History Project's study of automobile transportation in the 1920s, the volunteers working in the project (with the aid of recording equipment on loan from a local school and limited funding provided by a local civic group. the public library, and or the county historical commission) map out the general approaches they will use in many of the interviews.

For many, if not all of the project's interviews, the following general guidelines may be useful:

1. Obtain basic biographical information about each informant- name, where horn, where he she lived in 1925. names of parents and siblings, and brief overview of where the person has lived and worked throughout life. (This part of the interview should require less than 30 minutes.)
2. Ask the informant to describe life in Middleville immediately prior to the coming of the automobile business in 1925. What were the primary means of transportation? How did the informant view local transportation?
3. With both general questions and subsequent probes, ask about the construction and opening of the automobile business in 1925. For those who can recall some details, these questions may be appropriate:
   a. How was it financed?
   b. Who organized the business venture? Why?
   c. Who actually constructed the building? Any problems?
   d. How were the first employees selected? Who were they?
   e. What was the community's early reaction to the business?
   f. What were each informant's first direct experiences with the new business in the community? His, her first automobile ride?
   g. How did the informant's family and friends feel about this development?
   h. Why does the informant suppose Middleville received a car business at that particular time?

Achieving the above objectives, the oral historian may then proceed to more interpretive questions. The uniqueness of each person being interviewed should be kept in mind and questions modified to fit the informant's particular historical vantage point. It would be inappropriate to ask a respondent how the new automobile business ultimately changed Middleville if he,; she moved to another community less than a year after the business's opening. Depending largely on each interviewee's experiences in the community during the years following 1925, the following lines of questions may yield enhanced dividends for the project:

1. Ask about how the new business changed the Middleville community in five years, in 10 ears, or longer periods of time. Ask for examples.
2. Have the interviewee describe. with examples, the positive benefits of the automobile business, 1925-1980. Then ask about local problems resulting from the business.

3. From the respondent’s memory and personal experiences, have him her comment on the automobile’s impact on local business, education, morality, and other areas of life.
4. Ask for general and specific recollections on how the automobiles sold by the Middleville business affected rival means of transportation.
5. Include interpretive questions about how the automobile business stimulated the growth of other businesses (such as road building, gasoline and tire sales, glass sales, general automotive repairs).
6. Pose questions that ask the informant to think broadly about the ease of travel by automobile and how its introduction in Middle County enabled the local population to increase its range of movement.

In all of these lines of questions, begin with open-ended questions and pursue in detail with the various kinds of probes discussed in Chapter 3. Over and over, ask the interviewee how close he / she was to the events being described. If the respondent gives two examples, ask for a third or a fourth. Finally, ask the interviewee to recall and compare Middleville’s experience with that of a neighboring town or county, and be sure to obtain an assessment about how significant the topic was or has been in the community’s history.

PROCESSING ORAL HISTORY: TO TRANSCRIBE OR NOT TO TRANSCRIBE?

A tape-recorded (or videotaped) oral history interview may stand as an important historical document without further steps being performed. Oral historians often agonize over the question of whether they should attempt to transcribe their taped interviews. Such questions are integral parts of a larger consideration of processing the oral history collection; most of these matters should first be contemplated during the planning phase of a project. What follows are a few principles and tips about how to make a local oral history collection as useful as possible—to both present and future generations.

Transcribing oral history tapes is a difficult task. It requires much time (six to eight hours of transcribing for every one hour of tape) the expenses of office supplies, equipment and personnel; and more patience than many people have. Transcribing also requires a good ear for the many possible ethnic and regional dialects spoken by both interviewees and interviewers. Also needed are verbal skills to enable the transcriber to punctuate a manuscript and make editorial decisions about capitalization and other matters. High personal motivation, curiosity, and a willingness to learn about people and events also characterize the good transcriber. Surprisingly, excellent typing speed is not always needed in transcribing oral history. The basic objective of oral history transcribing is to set down on paper a faithful rendering of what was said into a recording machine during the interview.

Oral historians are far from unanimous in their views on transcribing local history tapes. Large, established oral history programs are committed to the ideal of producing near-verbatim transcripts of all of the oral histories recorded under their sponsorship. A noteworthy exception is found in Canada, where historians associated with the Sound Archives (a division of the Public Archives of Canada) insist that the essential document in "aural" history is the tape itself. Throughout the provinces, Canadians regard oral history as an important method of collecting and preserving what they consider to be a hitherto neglected aspect of history—the voice of the human recalling the past. Some Canadians are interested in transcribing oral history, but, since its founding, the main thrust of the Canadian Oral History Association has been to increase scholars' respect for oral memoirs as *aural* documents. This view of oral history has produced an interesting theoretical debate over the issue of what the essential historical document is in any oral history project. Many oral historians in the United States and other parts of the world perceive oral history in other ways, for the transcribing of oral history is a popular, if controversial, idea. [33]

What is "right" about transcribing oral history? A transcribed interview often satisfies the needs of scholars and general users to see and handle statements they can read and readily quote. The transcript is often preferred over the original tape merely because the former can be examined quickly while the latter will require much listening (or viewing) time. (A 50-page transcript is often desired by a researcher over its original form, a two-hour tape recording.) But, advocates of transcribing oral history often regard the transcript as a first draft subject to further editing, either by the local interviewee, an editor researcher, or perhaps a combination of the two. It should be noted that when transcribing occurs and both the tape and the resulting transcript are preserved, the oral memoir in question now exists in two documentary forms. The interviewee often likes seeing a transcript because it may provide an opportunity to edit the final memoir by adding information, deleting a bit of undesired material (such as false starts, "uhs," and misstatements), and rephrasing statements. Oral history project leaders often like the transcript because it is another means by which the interviewee can be reassured. Many oral history programs later show appreciation for their interviewees by presenting to them copies of their completed oral memoirs in edited transcript form. A further positive consideration is that the transcript becomes a tangible form of oral history that can be photoduplicated, microfilmed, or published in other was. Indeed, the preserved transcript of a person's recorded oral memoirs may itself be regarded as a limited publication.

A transcript takes on added value when one contemplates the loss or destruction of the taped version of an oral memoir. If the long-range goal of every oral history project is to give future generations access to the thoughts and memories of those who have gone before, a recognizable, words-on-paper transcript of a local history interview may reassure future users who may not comprehend the recording technology of the late 20th century. Alas, future researchers may be forced to rely on what they can read (oral history transcripts) if they cannot locate machines on which to play types of magnetic tapes they discover in libraries and archives.

What is "wrong" about transcribing oral history? The potential problems that may be encountered any time one transcribes an oral history interview are numerous. Aside from the obvious financial considerations, transcribing is at best an attempt to reduce to paper what has been said into a mechanical recorder at another time and place. There is simply no way that even the most experienced transcriber can comprehensively show (in typewritten words on paper) precisely what has been spoken during the interview. *The very act of transcribing, therefore, is a major editorial step, and the transcriber may find it difficult to punctuate the interview as would the original speakers.* Spellings of unfamiliar proper nouns, capitalization problems, extraneous sounds on the tape, false starts of sentences, hand gestures and other expressive "body language" not verbally explained, and other problems—these are the uncontrollable, often unverifiable, factors that make each transcript a fallible document at the outset. Many are the interviewees who express surprise at how their words "look on paper." One of the most serious problems inherent in every oral history transcript is that the paper version of the interview lacks voice inflections— those added dimensions that give much meaning to spoken words. No matter how careful the editing, without the original sound recording a transcript will always be limited as historical evidence, and researchers using it will need both keen imaginations and some skepticism about the validity of what they are reading.

The question of transcribing is worthy of consideration in every community oral history project. For those who take the affirmative side, the following advice may be helpful:

1. Realize that the transcript is an imperfect model of an event and be prepared to deal with those imperfections.
2. Purchase, rent, or borrow tape playback equipment with reverse, pause, and forward controls on a single foot pedal.
3. Use headphones to screen out nearby distracting sounds and to enable the transcriber to concentrate on the taped interview.
4. For the transcribing work itself, select one or more persons who possess strong verbal skills as well as interest in local history. Good spellers and careful, thorough workers are especially desirable.
5. Obtain at least one of the published guides to transcribing and editing oral history and adapt it to the community's oral history project.
6. Develop a simplified filing system to enable the local history project to keep track of each transcript after it is produced.
7. Early in the project, decide where the completed transcripts (and the tapes) will ultimately be stored and under what terms.
8. The transcribers should regard each oral history tape as a confidential document until the interviewee has signed an agreement releasing the contents of his, her interview(s).
9. Strive to produce a transcript that approximates the speech patterns of the informant, as well as a faithful rendering of the factual information imparted on the tape.

10. Study and adopt the stated principles of the Oral History Association for transcribing and editing oral history.
11. Whenever possible, have a second local historian check the work of the transcriber by comparing the transcript against the tape. This is often called an audit-check.
12. Strive for as much uniformity as possible in the formats of the transcripts but expect each oral memoir's transcripts to be unique, as is the interviewee. [34]

Local history groups unable to transcribe their oral history tapes, for whatever reasons, should not despair. For many communities in Texas, a lack of various resources, human or otherwise, may dictate the kinds of oral history projects they plan and conduct. Transcribing maybe an elusive luxury for some hut it need not mean that their oral history projects are of less value than others. After all, getting the memories of informants on tape is the primary work of the oral historian. Short of transcribing, there are many other creative ways in which oral history tapes may be processed. Some of the most important considerations are these:

1. As soon as possible after the recording session, make certain that an identifying label is on both the tape reel and its box or container. Include these items: name of informant, name of interviewer, date of interview, place of interview, length of interview, and name of sponsoring community historical group.
2. Obtain signed agreements from the persons whose voices are on the tape and keep the agreements on file near the tape.
3. If at all possible, make a duplicate tape from the original and thereafter treat the original tape as a master tape for preservation in the local history collection. Researchers and general users should be limited to using the duplicate of the taped oral memoir.
4. For added usability, make a tape index (using a stopwatch) for each magnetic audiotape by listening to the recording and noting the topics discussed at various timed intervals.
5. Develop for each tape, along with its unique identifying data, an abstract of its contents. This job may take the form of one or more concise paragraphs listing the topics discussed during the interview and giving the user general information about why the informant was interviewed as part of the local history project. The abstract should remain with the tape wherever it is stored.

Of course, nothing is as easy as is suggested above. Once the local history group has conducted a few oral history recording sessions, it will inevitably face a dilemma: for varying reasons, some oral history tapes will be deemed worthy of transcription, while others will be valued mainly as sound recordings. Even if the local group finds it impossible to transcribe all of its oral history collection, it may want to attempt the transcribing of a carefully selected group of its recorded oral memoirs. This task would certainly be a stimulating exercise for the local group; the challenge of transcribing well even one of its recent interview tapes would do much to increase the group's understanding and respect for oral documentation. Many lessons might he learned

about the editing of primary sources and lead the local group to new discussions about how it might intensify efforts to gather community history materials. As frustrating as the transcribing of oral history is, with some patience and an effort to achieve and uphold professional standards in processing an oral memoir, transcribing can be of great value to students, libraries, museums, and other local historical organizations seeking ways to enlarge both the scope and sophistication of their community work. [35]

A FEW LEGAL CONSIDERATIONS

Because oral history sound recordings, and any resulting transcriptions, have literary property value, there are several legal considerations that should be included in an oral history project. Most, if not all, American oral history recorded since January 1, 1978, falls under the revised U.S. copyright law that took effect on that date. In any project whose purpose is to record and preserve oral memoirs for later use, the rights of both respondents and interviewers are important, and the wise local history group will want to understand and be able to explain to others the legal implications of oral history. Get *a release in writing*, an admonition heard in many oral history circles, is just as important for the high school or local library project as it is for the Lyndon B. Johnson Library or a Texas university's oral history program.

For those who venture into oral history for the first time, particularly for community organizations interested in local history, the planning (goal-setting) stage of the project should include at least one consultation with a licensed attorney. Several standard release forms should be designed or adopted for the local project: (1) a general release; (2) an agreement allowing for restrictions and / or a time seal; (3) an agreement that covers tapes *and* transcripts; (4) an agreement that covers only tapes; and (5) an agreement for the interviewer to sign when the respondent has elected to seal or restrict an oral memoir. These forms will serve as donor forms to be used in transferring or conveying oral history materials to the organization, library, museum, or other institution sponsoring the oral history project.

Oral history agreements should be signed by both the respondent and the interviewer in each case. The interviewer, despite the fact that he / she is either an employee or a volunteer for the local history group, must sign an agreement. In each case it is assumed that the physical tape used in recording the oral memoir is already the property of the sponsoring group. If this is not so, then the owner of the tape will also need to contribute it to the oral history collection by signing a separate agreement or donor form.

When should the agreements (contracts) be signed? This decision is not always easy to determine. Under ideal circumstances, the agreement governing an oral history interview should be signed prior to the making of the recording. However, some people express hesitance about signing general (no restrictions) releases for tape recordings before they know the questions and their own responses. Perhaps the next-best approach is to ask for the respondent's signature immediately following the oral history session. A few persons, if they know that their tapes are going to be

transcribed, will insist that they postpone signing an agreements until they have viewed their transcripts. This prospect poses several additional potential legal problems.

The key to obtaining each respondent's release (or signed agreement containing restrictions) is usually found in the overall purpose of the oral history project as explained by both the sponsoring group and the interviewer on the day of the interview. Each respondent should feel free and be encouraged to ask questions about the legal forms. The oral historian should avoid alarming the respondent with statements about "the law," "red tape," "our legal obligations," and the like. The best approach is understanding and patience. and perhaps a reassuring comment that all of the people participating in the project are being asked to sign short statements giving their approval for the local library or group to place the tape(s) in its oral history collection.

If the respondent elects to place restrictions or time seals on the oral memoir and this is not a common occurrence interviewer or the representative of the local group should assure the respondent that those wishes will be scrupulously adhered to and honored. For the sake of librarians and archivists who must enforce the seals placed on oral memoirs (tapes or transcripts), the local group should endeavor to have any respondent desiring a time seal select a date in the future (perhaps five or more 'ears) when the oral memoir may be opened and used in the community. Local projects should avoid, if at all possible, the sealing of oral memoirs in any way that might require an archivist to determine if any person is living or deceased. In rare instances, the local historical organization itself may choose to seal a particular oral memoir; this restriction should be placed only after careful consideration of many factors.

Oral historians should encourage interviewees to be candid during the taping sessions and should inform them about the seal privileges in the legal agreements that may protect their statements on various sensitive subjects. In very rare instances, a tape may need to be sealed for a specified time period with no further processing, not even a tape index or an abstract.

No interviewer should deliberately le an interviewee into making libelous or slanderous statements about other persons. Discretion, common sense, and good judgment should be the hallmarks of proper interviewer behavior. If the interviewee asks if he/she should insert a derogatory remark about another person, the best advice is, "Don't tell me what others should not ever hear or read." Both interview collaborators should strive to create a historical document that can be used in the larger study of local history.

Candor and discretion: those are the marks, sometimes seemingly in conflict, of useful oral history. A competent local attorney should be able to assist the local historical group in achieving the above objectives through carefully worded legal forms. [36]

The Texas Legislature has considered the proper relationship between oral history and the state's open record act. At issue is whether a public repository can

observe time seals on oral histories deposited in it. In a 1983 law, the legislature exempted public colleges and universities from the open records act insofar as deposited oral histories are concerned. This legislative change occurred through an amendment to the Texas education code. Yet to be addressed is the related question of whether public museums, libraries, and other institutions unrelated to state colleges and universities may allow their interviewees to place time seals on oral memoirs deposited in their collections. [37]

ETHICAL CONSIDERATIONS

As oral history has developed rapidly as a research movement, its practice has led to the establishment of a generally accepted canon of ethics. The Oral History Association (OHA), an international body, has on two occasions adopted statements of ethical principles and urged their application throughout the oral history movement. The OHA's 1968 "Goals and Guidelines" set forth the professional association's earliest effort to help oral historians think through some unavoidable ethical concerns. The association's 1979 Oral *History Evaluation Guidelines* serve primarily as criteria for judging existing oral history projects, but they also speak to some of oral history's potential ethical problems. Both of these OHA compilations are brief, straightforward, and easily adaptable to almost any Texas local history project.

Adherence to proper ethical standards in oral history activity will help all parties avoid embarrassing situations resulting from either lack of foresight or ignorance. Being aware of potential ethical problems beforehand is always a good idea' it is also prudent to explore some of the moral implications of oral history. Each oral history project should commit itself to achieving the highest attainable professional integrity in all its work. The OHA "Goals and Guidelines" compiled for interviewees, interviewers, and sponsoring organizations remind their adherents that oral history should never be associated with unscrupulous practices. The newer *Evaluation Guidelines* underscore the need for oral historians to protect confidentiality (when it is requested), the spirit of mutual respect, and the carrying out of all legal agreements' terms. The 1979 standards also aim to protect oral history tapes and transcripts from unethical use and suggest that all persons concerned work toward that ideal.

Even more specifically, each Texas oral historian should enter into an under standing (explicit, if possible, but always implicit) with each volunteer informant. The informant should agree to approach the interview(s) in a spirit of candor, in return for which the oral historian will not disseminate (publish, talk about, or in any way release) information contained in the interview(s) contrary to the informant's desires. This situation is similar to the doctor-patient and lawyer-client relationships now protected by common law. Historians should view their dealings with oral history respondents as morally binding relationships no less important than those found in other professional fields. Respondents should clearly understand that all interviews should ultimately, if not in the near future, be made available for historical research and (perhaps) publication in some form.

The ethical obligations of oral historians, therefore, are serious and sometimes in conflict. Each oral history project should be as free of bias as possible and be committed to truth in history. The duty to collect the grist of history also carries an equally binding responsibility to protect the interviewees who are history's living sources. Moral commitment and conscientious effort to uphold reasonable ethical principles in all phases of oral history work should be the hallmarks of every local oral history project. The integrity of the overall oral history movement depends on the successful applications of the foregoing standards of ethics. [38]

PRESERVING ORAL HISTORY

Oral history, for all its present benefits and uses, also has many implications for the future. When local history organizations carry out oral history projects, they expect the products of their labors to enrich a few, if not many, future generations. Taped interviews and the resulting transcripts will not care for themselves.

Adapting fundamental archival advice to local oral history projects will invariably start with a few suggestions:

1. Magnetic audiotapes (and videotapes) should be stored in vertical positions, preferably on wooden shelves, away from high-voltage electric equipment and metal objects that may become magnetized.
2. For best results in storing tapes, they should be played at least once each year to avoid potential problems with the layers of wound tape.
3. Tapes (both audio and video) should be stored in cool, dry places—72 degrees Fahrenheit, 50 percent relative humidity. Extreme cold and heat should be avoided at all times.
4. To assure their future usability, tapes should be duplicated each time new recording methods and formats become generally accepted.
5. For high-quality sound, master (original) tapes should be reel-to-reel, recorded at 3 3/4 inches per second. Duplicates on cassette tapes may also last many years, but reel-to-reel tapes are superior to cassettes.
6. Clear procedures should be established to assure that the oral history tapes are not accidentally erased.
7. To increase their life expectancies, interview transcripts should be on stationery of high cotton content (50 percent or above).
8. Oral history transcripts should ideally be preserved and maintained in acid-free folders or boxes, under the same temperature and relative humidity standards as those used for magnetic tapes.

Even with the best of intentions, many local history groups will not achieve the above archival standards. For those whose budgets and other limiting factors make these standards beyond reach, the best advice is short and simple: keep oral history tapes and transcripts as orderly as possible and in conditions likely to prolong their lives. Just as a family reviews its photograph collection from time to time, the local

history group should "exercise" its oral history tapes by playing them to make sure that the precious memories of its interviewees live on to benefit others in the future.

Libraries, archives, museums, and other institutions chosen to house local oral history collections will find little help in standard reference works when the begin the vital steps of accessioning and cataloging oral memoirs. Accessioning is relatively easy and local processors of tapes would do well to follow the lead of the John F. Kennedy Library, and inventor each new interview separately as follows:

OH 86-24

Such an accession number simply means that the item is an oral history tape (or transcript) that is the 24th interview accessioned in the calendar year 1986. Each "OH" number should remain with its tape and or transcript throughout an institution's processing steps and may be the clearest catalog number that could be assigned. [39]

Whether a local collection houses oral history tapes, transcripts, or both, it will certainly need to identify all interviews as clearly as possible. According to the Library of Congress, the best way to identify and describe oral history tapes and transcripts is to have the following information for each memoir:

1. Name of interviewee and (if possible) a descriptive title of the interview.
2. Name of interviewer.
3. Place, date, and circumstances of the interview.
4. Number of tape reel, cassette or number of transcript volume.
5. If series, title and number.
6. Name of sponsoring organization.
7. Date (month, day, and year) of tape or transcript(s).
8. Statement of legal status of oral memoir and statement of public or scholarly access.
9. Brief comment regarding occupation or career field of interviewee.
10. Brief abstract of the interview's contents.

From the above information a researcher might then deduce the following for a footnote in a work on local history:

John Doe, Oral History Interview with John Doe, typed transcript of a tape-recorded interview conducted hr Jane Public, Potter County Oral History Project (Amarillo: Potter County Historical Commission, 1986), pp. 135-142.

An inverted version of the same information plus the location of the library: archive housing the oral memoir should be included in the bibliography of the local history work. [40]

A card catalog is always appreciated b users of oral history collections. The local history group is only a short step away from being able to develop a card catalog when it logs the basic interview information enumerated above. Depending on their resources, local institutions should endeavor to establish card catalogs to serve as finding aids. A basic card catalog may be only alphabetical lists of names of interviewees / respondents. A helpful card catalog will also include subject tracing

cards and other means of giving researchers help in determining the contents of each oral memoir in a collection. In the catalog, the main entry card for an oral memoir should include the following:

1. Interviewee's name (inverted) life dates.
2. Accession number.
3. Interviewer's name.
4. Date(s) of the interview(s).
5. Length of the interview(s) in hours and in pages. if transcribed.
6. Terms of use legal status and access statement.
7. Name of series, if applicable.
8. List of principal topics discussed during the interview(s).

If possible, the card catalog should contain at least two cards for each memoir: the interviewee card and a general subject card. Additional tracing cards add much to the catalog. [41]

Since some local history groups may be unable to transcribe their oral history tapes and catalog the indexed resulting transcripts, a few words of encouragement and advice are in order for those ho want to turn their oral history tapes into the most usable documents they can become. The tape index is an answer to this problem. In lieu of transcribing and cataloging, each local history organization should endeavor to produce as many oral history tape indexes as possible. A lap counter, found on most tape recorders. is generally adequate for this task. A stopwatch may also he employed to gain e greater accuracy. An example of a tape index compiled by a lap counter might look like the following:

Oral History Interview
John Doe
September 1. 1986
Lubbock. Texas
Side One

Counter Number	Subject
1-50	Introduction and family information
51-75	Doe's education
76-100	Move to Amarillo
101-200	Work in oil and gas fields in 1920s
201-350	Depression effects on Panhandle

A tape index compiled with a stopwatch would differ only in the following way:

Side One

Time	Subject
0:00- 1:00	Introduction
1:00- 4:30	Family information
4:30-15:00	Doe's education
15:00-20:15	Move to Amarillo
20:15-30:00	Work in oil and gas fields in 1920s
30:00-45:20	Depression effects on Panhandle

The compilation of oral history tape indexes is a good activity for the secondary school group interested in furthering the preservation of local history. Junior Historian members and other secondary school students are usually capable of making tape indexes for local oral history collections. Obviously, some differences will exist between tape indexes for reel-to-reel tapes and those for oral history on cassette tapes. As a word of caution, all local historical groups should remember that the built-in digital lap counters found on many tape recorders vary from manufacturer to manufacturer, making their use less than precise. The tape index, however, is well worth the effort and is probably the single most important step a local group can take toward insuring the use of its community's oral history collection. [42]

The care of oral history collections is worthy of careful consideration. With proper planning and application of time-tested procedures, Texas communities can achieve lasting results in oral history, while also having much fun in consulting local living sources.

NOTES

[29] Louise B. Jones, “The Importance of Goal Setting in Oral History Projects,” *Idaho Oral History Center Newsletter,* I (March 1980): 1-2, contains good advice from a professional consultant and owner of Personal Management Associates in Boise.

[30] Robert N. Butler, former director of the National Institute on Aging, is the leading authority on the concept of life-review. See his “The Life Review: An Interpretation of Reminiscence in the Aged,” *Psychiatry,* 26 (l963):65-76.

[31] Alice Hoffman, “Who Are the Elite, and What Is a Non-Elitist?” in *The Oral History Review* 4 (1976): 1-5; Charles T. Morrissey, “On Oral History Interviewing,” in Lewis Anthony Dexter, ed., *Elite and Specialized Interviewing* (Evanston, Ill.: Northwestern University Press, 1970), 109-1 18; and James W. Wilkie, *Elitelore* (Los Angeles: Latin American Center, University of California, 1973).

[32] Gary L. Shumway and William G. Hartley*, An Oral History Primer* (Salt Lake City: Primer Publications, 1973), 21-27, provides a useful outline of life-review topics. See also William G. Hartley, *Preparing a Personal History* (Salt Lake City: Primer Publications, 1976).

[33] See *Manual: Sound Archives* (Ottawa: Public Archives of Canada, 1976).

[34] Two guides to transcribing are Cullom Davis, Kathryn Back, and Kay MacLean, *Oral History: From Tape to Type* (Chicago: American Library Association, 1977), and Willa K. Baum, *Transcribing and Editing Oral History* (Nashville: American Association for State and Local History, 1977).

[35] *Ibid*.

[36] Joseph Romney, “Legal Considerations in Oral History,” *The Oral History Review* 1 (1973):66-76; Truman W. Eustis, “Get It in Writing: Oral History and the Law,” *The Oral History Review* 4 (1976):6-18; and William W. Moss, *Oral History Program Manual* (New York: Praeger Publishers, 1974), 14-18. The most recent work on this subject is John Neuenschwander, *Oral History and the Law* (Denton, Texas.: Oral History Association, 1985).

[37] Texas Education Code Annotated, Par. 51.910, Acts of the 68th Texas Legislature, #482, Sec. 1, effective 19 June 1983.

[38] Oral History Association, “Goals and Guidelines” (1968); Oral History Association, *Oral History Evaluation Guidelines* (1979); and Moss, Oral History Program Manual, 12-14.

[39] Moss*, Ibid*., 59; Cullom Davis, et al, *Oral History: From Tape to Type*, 34-36.

[40] Arline Custer, “Bibliographical Identification and Description of Oral History Records,” in *Selections from the Fifth and Sixth National Colloquia on Oral History* (New York: Oral History Association, 1972), 99-102, is an excellent guide from the Library of Congress.

[41] Cullom Davis, et al, *Oral History: From Tape to Type*, 87-101.

[42] Tape indexing is discussed in ibid., 23-24, 78; volume indexing is a complex field well described in Barbara M. Westby, ed., *Sears List of Subject Headings*, 10th ed. (New York: Wilson, 1972) and Thomas V. Atkins, ed., *Cross-Reference Index, A Subject Heading Guide* (New York: Bowker, 1974).