DESIGNING AN ORAL HISTORY PROJECT

1. **General Planning.   In a grant proposal, this would be written up as "background."**

   A. Carefully define the topical and temporal focus of the project. What questions are driving the project? Why are they important or significant? What individuals can best answer these questions? And why can't they be answered by existing documentation – what new knowledge will oral history interviews generate? What current concerns have led you to want to do this oral history project? **Focus the project as much as possible - too many oral history projects wander all over the place with no coherence or depth. It helps to write a short paragraph defining your goals.**

   B. Begin to think about intended outcomes: are you developing solely an archival project? Or are you considering additional outcomes – publication, website, theater piece, film or video, podcast, walking tour, exhibition, community celebration, presentation? In either case, where will interviews be archived? Will they be made available to others (they should be!)? Overall, what do you see as the project's impact?

   C. Begin to identify available resources: personnel to carry out the project, institutional support, people to interview, money, equipment; also available documentation, for background research; and connections/networks within the intended narrator population. And start thinking about how you will obtain the resources you will need to carry out the project.

   D. Consider developing a group of advisors, to include members of the narrator community {whether defined by locale or some other feature like occupation or religious identity}, content specialists, and oral history experts. This is especially important if you are seeing funding – funding agencies need assurances of both local support and quality control.

   E. If this project is undertaken by an institution, define how it meshes with your institution's mission and goals.

2. **Develop a project methodology, that is, how you will accomplish your general goals. Think through every step involved in actually doing an oral history project: what tasks need to be accomplished, who will do them, and according to what schedule. Throughout, pay attention to how you will produce quality work.**

   A.   Interviews: How many interviews will you conduct? How will you identify and select narrators? For how long will you interview these narrators - do you envision one session, more than one, many? On a grant proposal, it is helpful to attach a list of potential narrators, noting those who have already been approached about being interviewed and who has consented to an interview.

   B.   Interviewers: Who is going to do the interviews? How will you recruit, train and monitor the work of interviewers?

   C.   Background research: What kind of background research - primary and secondary - will you do for the entire project? Who will do this research and how will it be shared with interviewers?

   D. Topical outline: What topics will you interview on, in order to get at the questions driving the project? Are there any potentially sensitive questions pertinent to the subject of your inquiry? How will these be handled within interviews? In developing a funding proposal, it is helpful to append an outline of topics and subtopics, perhaps developed in conjunction with advisors.

   E. Interview methodology: How will you make initial contact with a potential narrator, develop and sustain rapport? How will you inform them about their project? Will you use a biography form to get background information around which you can structure your interview?

F.   Release form: This is not a question – you must develop a release form, by which the narrator grants permission to use the interview, ideally by "releasing" copyright to the individual or institution/organization conducting the project. It is advisable to attach a sample release to grant proposals.

G.   Additional materials: Will you also collect collateral materials (photos, personal papers, institutional records, etc.) in the narrator's possession? How will this be managed, logistically and legally?

H.   Preservation: Where will original interviews, accompanying paperwork, and transcripts (if available) be maintained? What copies will be made, on what media? Who will make them, and where will they be maintained? Are preservation plans in accord with archival standards for oral history? How will technological updates be managed?

I.   Processing completed interviews: How will interviews be processed to the point of access? Will you summarize, transcribe, audit check, send to narrators for review, correct, edit, index? What metadata standards will be established and implemented? What collection management system will be developed and maintained? How will technological updates be managed? Who will do this work?

J.   Access: How will you make interviews available and accessible to others? How will others find out about these interviews for their own research? How will the collection – or better, individual interviews – be catalogued? Will they be included on major data bases? Will any material be available via a website; and if so, what – project description, full access to interviews and transcripts, something in between? Whether available on a website or in person in an archive, how will users find relevant material in individual interviews – what points of access or search mechanisms will be developed? Importantly, who will do the work of making interviews accessible? Also, what precautions will be taken to insure responsible use? Accessibility is a particular concern for funders, who want their investment to have longterm value.

K.   Products: If you envision outcomes other than an archival collection, how will they be developed? What steps are involved in the process and who will do the work?

L.   Equipment: How will interviews be recorded, in accordance with professional standards? How will you obtain this equipment? What about preservation copies and storage materials? Transcribing hardware & software? Hardware and software for web site development? Materials for product development?

M.   Management/Staff: Who will oversee the project and manage the work flow?

N.   Timeline: How long will all of this take? It is advisable to develop a timeline - what will happen when, on a weekly or monthly schedule. Include this on any funding proposal.

3.   **Develop a budget.**

Possible costs include:
- Equipment and materials: Recording media - recorder(s), microphone(s), microphone stand(s), flash drives; copying media - CDs, DVDs; transcribing software and hardware; equipment for web site development: hardware, software; materials for any products envisioned
- Travel/per diem: for interviewers to interviews, for advisors to meetings.
- Personnel: project director, additional staff, interviewers, transcriber(s), editor(s)/indexer(s), archivist, website developers; those involved in developing any product
- Honoraria: to advisors; to narrators (rarely done)
- Office space
- Telephone and supplies; postage
- Additional?

Even if you are relying largely on volunteer labor, contributed facilities and equipment, etc., it is good to document the value of these in-kind contributions. It is essential to do so if you are seeking grant funding.

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