



---

# ORAL HISTORY INTERVIEW PLANNING AND RECORDING WORKFLOW

## INTRODUCTION

This workflow provides recommendations for setting up and recording an oral history interview. It is important to be familiar with your equipment, research topic, and project plan before walking into an interview. A good workflow will ensure clear audio, good documentation, and a healthy rapport with the interviewee.

For more information about oral histories, view related items connected to this resource on the Sustainable Heritage Network in the “[Audio Recordings](#)” category.

- Basic Oral History Recording Kit: Equipment Purchasing Guide
- Conducting an Oral History Interview: Workflow
- Suggested Guidelines for Recorded Interviews

## ARRANGE THE INTERVIEW

A successful interview and recording start when first contacting an interviewee.

Thoughtful decisions and plans at this stage will facilitate the actual interview later.

- Schedule the interview at a time and place that is comfortable for the interviewee. The space should minimize noise and distractions.
- Let the interviewee suggest the time and place. Suggest alternate locations if they pick somewhere impractical, like a busy coffee shop.
- Schedule a time that fits into the life of the interviewee and will avoid predictable distractions.
  - Eg: scheduling an interview at a time when the interviewees children are returning home from school can result in a lot of background noise and added distractions.
- Schedule the interview in a location that is both quiet and comfortable.
  - While a sound studio might give best audio quality, it might make your interviewee nervous.
- Ask yourself and the interviewee if there are any other potential distractions.
  - Does the interviewee have enthusiastic (and potentially noisy) pets?
  - Are they expecting a package delivery or guests?

- Beware of noise, eg: air conditioners, furnaces, traffic, construction, clocks/chimes, ringing phones. If needed, ask if there are alternate rooms or locations you can record in.
- One-on-one interviews are best, but consider allowing others to sit in if it will help put the interviewee at ease.
  - It can be very difficult to record and engage with multiple interviewees.
- Ensure you have access to a power outlet, especially if you expect a long interview.

## PREPARE YOURSELF AND YOUR EQUIPMENT

Once on site, check the following to ensure a good recording:

- Place the recorder on a stable surface between you and the interviewee.
  - If using a lapel/clip-on microphone, help the interviewee to wear it properly.
  - If using separate or multiple microphones, check the placement of each.
  - Ensure you can see the display of your recorder without being distracted from your interviewee.
- Do not hold the microphone or recorder, use a stand or mount for consistent audio levels.
- Be aware of small noises, eg: paper shuffling, pen tapping, mug clinking, fidgeting. These may come from the interviewer, interviewee, or others in the room. Politely adjust or ask others to adjust before the recording begins.
- Test your equipment. Record a short amount of audio to check input levels, placement, etc.
  - Is everything recording properly?
  - Is audio clear?
  - Can you hear both you and the interviewee?

## RECORD THE INTERVIEW

Remember the following to elicit the best responses, and create the best environment for your interviewee:

- Let your interviewee see/know what you are doing at all times.
  - “I’m doing a test recording to make sure I can hear you clearly.”
  - “May I clip this microphone on your lapel, or help you adjust it?”
  - “Can we close the door to the kitchen?”
- Never start recording without the interviewee’s consent.
  - “I am going to start the recording in a moment, and I will record the date,

location, and both of our names to begin. Is that OK?"

- Give the interviewee your full attention, but keep an eye on the recorder just in case something goes wrong.
- Do not stop the recording if at all possible. Reasons to stop recording include:
  - Scheduled breaks during long sessions (which are not recommended).
  - Events that require the interviewee to step away (e.g. unavoidable phone call).
  - The interviewee becomes upset or otherwise needs a break.
  - The interviewee requests that you stop recording.
- If the recording is stopped, be very clear when stopping, and when starting again.
- Speak clearly.
- Give the interviewee time to reflect, and respond -- silence is fine.
- Do not interrupt or cut off the interviewee. Redirect the conversation in natural breaks.
- Explain/verify any physical gestures the interviewee makes:
  - "The fish was this big." "About eighteen inches?"
- Explain/identify any physical prompts being used:
  - Photos, etc.
- Be aware of the interviewee's energy, fatigue, and emotional state, and adjust your behaviour and interview as needed.

## CONCLUDE THE INTERVIEW AND FOLLOW-UP

Ensure that any loose ends are tied up and professionally conclude the interview. Give the interviewee time to wrap up, and you may even discover the speaker has more stories to tell. Take this time to discuss future interviews, take photos or document physical prompts used, and complete any remaining paperwork as needed, including deeds of gift, consent or release forms, and your notes.

The following steps also show respect for both the relationship and the recording:

- Do not pack up immediately.
- Take time to thank the interviewee, maybe even talk more.
- Often there is an unexpected gem of a story, so keep the recorder handy, and ask to recorder additional short stories.
- Have the interviewee sign the deed of gift or release form(s). It is essential that oral history projects use release forms to confirm that interviewees have given their consent to be recorded and for the recordings to be preserved and accessed. See the "American Folklife Center - Oral History Interviews" link in the Additional Resources below for more information.

- Label your notes and recordings.
  - This might be filenames or physically labelling storage media.
- Transfer recordings to more secure storage as soon as possible.
- Process recordings as soon as possible.
  - Editing, transcriptions, etc.
- Send a thank you note to the interviewee, along with anything else you discussed, such as copies of the recording or other materials.

## ADDITIONAL RESOURCES

- American Folklife Center - Oral History Interviews
  - <https://www.loc.gov/folklife/familyfolklife/oralhistory.html>