

**It Takes a Village: creating the USC Upstate Oral  
History Pilot Project**  
by Ann E. Merryman

**Abstract**

This article presents a case study of a pilot project to collect oral histories from under-documented communities in Spartanburg, SC and surrounding areas from the perspective of the Coordinator of Archives and Special Collections. The case study covers the purpose of the project, challenges faced developing the oral history process in a single-archivist environment at a university of approximately 6000 students, and the decisions made by the archivist and faculty members that enabled students to participate in the project as novice oral historians. This article expands upon a presentation given on March 15, 2018 at the 2018 Society of North Carolina Archivists Annual Meeting in Durham, N.C. entitled "It Takes a Village: A Collaborative Approach to Preserving Spartanburg County's Under-documented Communities through Oral Histories."

**Introduction**

In the fall of 2017, the Interim Director for the Office of Service-Learning & Community Engagement at the University of South Carolina Upstate approached the Archives and Special Collections department? Unit? with some questions about the types of collections held by the archives. Specifically, he wanted to know whether the archives held any sort of historical material related to African Americans in Spartanburg County, SC, and whether there would be interest in building such a collection if one did not already exist. The Interim Director had been brainstorming ways to incorporate service-learning opportunities into course offerings with a professor of African American Studies interested in having students collect oral histories from African American community members, and they wanted to find an appropriate home for this collection.

Considerations about time commitments and resources required to produce oral histories were necessary before starting the project. Oral histories are more involved than just recording a conversation between two people and saving it. Louis Starr defines oral history as "primary source

material obtained by recording the spoken words—generally by means of planned, tape recorded interviews—of persons deemed to harbor hitherto unavailable information worth preserving".<sup>1</sup> Thus oral history collection, by definition, would require a significant amount of skill, care for the material, and a detailed preparation plan. The prospect of developing a base level of knowledge and skill and creating a standardized process for the ethical recording and archiving of oral histories, while still performing the other aspects of my job as a public services librarian and archivist, was completely daunting.

However, this project proposal from the outset was different than simply being told "oh, you should really think about doing oral histories." This time, there was the prospect of help from faculty members and their students, who would act as the interviewers. My primary goal would be to develop the infrastructure, the framework, and the guidelines for producing an oral history that would not only be archivally sound and a strong addition to the University Archives, but also serve as a relevant historical record for future researchers. In addition, I would provide assistance and input to faculty members regarding the timeline and workload, and how best to distribute that workload throughout the semester while still respecting the other learning objectives of the course. Finally, I would be responsible for teaching the students and faculty how to complete all the steps of an oral history project. Despite not having any prior hands-on experience with oral histories, the Oral History Pilot Project was born. During the spring of 2018, the archives partnered with two sections of African American Culture and one section of LGBTQ Studies, each taught by different professors, to help the students prepare for and collect complete oral history interviews.

### **Summary of Major Obstacles and Opportunities**

Many obstacles exist for institutions wishing to collect oral histories, whether they are new to the process or seasoned veterans. These barriers include things like lack of funding and staffing, lack of established collection management policies that could be incorporated into a new oral history program, the wide variety of technological formats available for recording, and preservation issues.<sup>2</sup> The University Archives was faced with all of these to a

large degree, but the biggest obstacle to beginning an oral history program was the lack of staffing. In the archival world, solo archivists working with very little or no support staff are known as "lone arrangers," a fun play on words that belies the struggle of working alone on projects both large and small. Like many other archivists, I have additional non-archives-related responsibilities that take time away from archival work. It is important to understand the time commitment involved when considering any new project, and because this was a brand new project, the projected time commitments were an estimate.

Another hurdle was unfamiliarity with oral history methodology and implementation. I had never participated in or facilitated the collection of an oral history, nor studied the process beyond basic reading and anecdotal conversations with colleagues involved with oral histories. During the initial discussion phase with the two faculty members interested in collecting oral histories, it became readily apparent that this project was going to be complex, requiring a significant time commitment to become familiar with the basic process and determine how best to adapt this process to the goals the faculty members had for their courses. For their part, the faculty had to determine how much course time they were going to allocate so that I could train the students on the oral history process. Having the students in the course record the oral history and do all the associated research meant that I would have to teach myself the process, as well as develop tools to quickly teach that process to students.

USC Upstate's library has budget and technology restrictions that are not always found at larger institutions, which can make undertaking larger and more complex projects challenging. As a lone arranger in this situation, I've become fairly adept at using my limited technology and funding to accomplish projects. However, oral history projects require following a set of guidelines to ensure their future usability and safeguard access for all researchers and historians. This means using recording equipment and software that will produce stable, accessible recordings suitable for archiving but that is also economically feasible on a limited budget.

With obstacles come opportunities, and there were a few of those to offset the challenges I would face. One opportunity presented itself in the growing trend across

campus to provide service-learning experiences for students in many different disciplines. High-impact practices, or HIPs, are a growing focus for undergraduate learning and include service-learning, community-based learning, or collaborative projects, all of which would become components of this pilot project.<sup>3</sup> It seemed like a natural fit to integrate the archives and oral histories with student HIPs. This in turn would provide opportunities for students to connect with various individuals in the upstate region, and link students to communities where they may find themselves working after graduation.

Because this project was proposed near the end of the fall 2017 semester, there was very little lead time to develop the infrastructure and process for gathering oral histories that would begin in the spring of 2018. As a lone arranger, I'm inclined not to reinvent the wheel whenever possible, and that was particularly true in this case. So much great work is being done by many archives and libraries around the country and in the spirit of collaboration, most of these institutions have put their resources online for others to access and use. The challenge was to comb through all of the information, and figure out a way to adapt the various processes available to best support the Oral History Pilot Project.

### **Project Design**

Just like any other research project, frameworks and guidelines needed to be in place before beginning the pilot. Designing these guidelines would inform how the project would be undertaken, and also help to ensure consistency as the project matured. However, there was no way to know if the choices being made at the beginning would actually work once the project began. Much like architectural designs, just because the project seemed workable on paper didn't mean that we wouldn't have adjustments along the way, particularly once interactions with the narrators began.<sup>4</sup>

I started by deciding on some basic technical and design guidelines for the project. First, I decided to use the term "narrator" instead of "interviewee" to describe the subject of the interview. This was done based on the terminology described by the Oral History Association in the introduction section of their Principles and Best Practices documentation found on their website.<sup>5</sup> In addition, I felt

that making a noticeable difference between the term for the subject of the interview (the "narrator") and the student doing the interview (the "interviewer") would be helpful for novice oral historians. Next, we would record audio files only, not video, and use the open-source software Audacity to capture the audio using the student's own laptops. I chose this method because video files can be more complex than audio, require more storage space and technical skill to maintain accessibility, and the archives had no budget for software or high-end recording equipment. Transcriptions would be a necessity, but I wasn't sure at the outset how we would be able to complete them within this project. The teaching faculty would build upon their expertise and contacts in their particular fields of study to arrange for narrators to participate in the project based on the goals they had for their specific courses. The students would work in groups of four or five to complete an oral history from start to finish, meaning students could help each other learn the various skills involved. And finally, a photo of the narrator alone and a photo of the narrator with the group that did the oral history interview would be taken and included with the audio file and transcription.

Once these parameters were decided upon, the next step was to think through the process of recording an oral history and develop documentation targeted towards novice oral historians, specifically students in this case. While gathering and preserving oral histories is by no means standardized, there are many institutions who have done significant work developing systems that are appropriate for a variety of institution types and sizes. An excellent resource is the Southern Oral History Program at the University of North Carolina at Chapel Hill Center for the Study of the American South. Their website includes a large number of links to many resources and programs around the United States that were particularly helpful in developing tools and forms for the pilot project.<sup>6</sup> It was important that everyone involved with the project was aware of the protocols and requirements and followed all steps to ensure cohesiveness through all recordings. Six documents were designed to help guide students through the process, all based upon work done at other institutions and adapted to the Oral History Project here at Upstate. These forms are described in more detail in the following sections, with copies of each form located in

the appendix.

#### Oral History Release Form

The entire oral history process hinges upon receiving authorization to use the recorded interview in various formats, including sound bites and written transcripts. It is essential to obtain a signed release form for the recording to be archived as a historical document and used for research. Without written approval, the institution could potentially be exposed to legal and ethical liabilities if the recordings were made public. For this project, two copies were signed prior to recording the actual interview, with one copy retained in the archives and one copy retained by the narrator. The release form also outlines copyright for the narrator and provides an option for restricting usage of the final interview if desired.

#### Pre-Interview Checklist and Biographical Data Form

The Pre-Interview Checklist outlines all the steps prior to recording the interview. One of the most important steps is completing the Biographical Data Form, which lists basic information about the narrator: place of birth, family members, schools attended, any degrees earned, jobs held, and other similar information. This data is used to aid in completing transcriptions as well as in writing the finding aid for the oral history. Often a transcriptionist is not familiar with location names, so having the form allows for a more accurate transcription. In the same way, the form ensures personal names are all spelled correctly. Oral historians complete background research on their narrators using traditional library and archival sources along with online sources. The form is designed to provide places to start the research process, such as considering the historical era in which the narrator spent their childhood or what historical events may have impacted the narrator's life. This background research, along with the Biographical Data Form, allows oral historians to develop a focused list of questions and topics to guide the interview. Students in both courses were asked to develop a list of ten questions, which would help keep the interviews all approximately the same length. Another important step on the checklist asks the narrators about other materials related to the oral history interview that they may wish to deposit with the archives

such as photos, diaries, or publications. These types of supplemental materials add depth and context to the interview. Finally, the checklist includes the required file naming structure to be used with all materials generated as part of the interview, a sample opening announcement to be recorded at the beginning of every interview, and a reminder to practice with the recording equipment prior to the day of the interview.

#### During the Interview Checklist

This checklist clarifies the time goals for the interview process and the estimated time required for setup and breakdown of the recording equipment, ensuring enough time is scheduled. For this project students were encouraged to aim for a 45-minute to one hour recorded interview, guided by the list of approximately ten questions developed from the background research and the Biographical Data Form. The checklist also explains what each member of the group is responsible for during the actual interview. Because this was a group project in both courses responsibilities were divided amongst group members, with one student acting as the interviewer and one student monitoring the recording equipment for technical issues that could occur during the interview. The remaining group members ensured all questions from the list were asked, documented any follow-up questions asked that were not part of the original question list, and took notes on the actual interview. Part of the follow-up assignment for students in both courses was to write a reflective essay on the interview itself, and the process of completing the oral history. A "how-to" section is included as part of the checklist, reiterating the order in which questions and follow-up questions should be asked, along with a reminder to take the photos of the narrator and the group. The photo guidelines include taking two photos (one of the narrator alone, and one with the whole group), without using filters if phones are used to take the photos.

#### Field Notes and Post-Interview Checklist

An explanation of what field notes are and how to write them is included in the checklist, as most novice oral historians are unaware of their importance when archivists write up the finding aid. Field notes should include a description of why the narrator was chosen for the project,

personal reflections and opinions about the interview process, notes on key themes or points that were included in the interview, and possible future research ideas. It is also helpful to include a detailed description of the interview location, all other individuals present (including their roles assigned), as well as any unexpected topics that came up during the interview.<sup>7</sup> Field notes should be written immediately following the completion of the interview, or as soon after as possible. For this reason, students in the pilot project who were not assigned as the interviewer or technology person during the interview were encouraged to begin writing their field notes during the interview session. The field notes help provide context and background to the actual recorded interview, and can help future researchers using the oral history.<sup>8</sup> The post-interview checklist reminds interviewers once more to confirm that release forms have been distributed and photos have been taken, reiterates the file naming structure, explains how to export the WAV file from Audacity, and reminds students in the pilot project of the importance of sending a hand-written thank-you note to the narrator. Also included as part of the post-interview checklist is a *Sensitive Content Checklist* which helps to identify if any actionable content was inadvertently shared during the interview.

#### Audio Guidelines Checklist

For the Oral History Pilot Project, Audacity recording software was chosen for its ability to export recorded files in WAV format, the accepted file format for long-term archival preservation of audio files. In addition to being open-source, Audacity has an intuitive user interface that was easy to teach students how to use and is available for download on both Mac and PC. Students downloaded Audacity to their own laptops, and were encouraged to practice with it prior to recording their interviews. The only hardware purchased for the project were basic dual-lavalier microphones, which help to reduce ambient noise during an interview and allow both the narrator and interviewer to be clearly heard. A variety of microphones are available on Amazon, and customer reviews of the different models helped make the decision easier. The main criterion for the microphones was for them to be compatible for use with laptops (both Mac and PCs). The model chosen for the pilot

project retailed for around \$30, but several similar models fell within this price range. The archives purchased two sets for the pilot, and the Center for Women's and Gender Studies purchased two sets; all microphones were held at the circulation desk of the library for check-out by the students.

### **Implementation**

The two participating faculty members had very different course structures, so I was not able to use the exact same teaching methods for both. One faculty member was teaching a single section of an upper-division methods course, where enrollment was restricted to juniors and seniors and the course was capped at 15 students. The course was newly re-structured into a hybrid service-learning model where the students and professor only met in person once a week for lectures. The other day was available for out-of-class time to work on the oral history project assignment. The professor devoted two class periods during the first two weeks of the semester for oral history instruction. I used the time to share some background on the evolution of modern oral history, to walk through the entire oral history gathering process using the checklists developed for the project, and to teach the students how to use Audacity software and the microphones to capture the recorded interviews. The class met for 75 minutes, so in total 2.5 hours were used to provide training to the students. While I maintained contact with the professor throughout the entire semester, after the initial training was finished the students took control of their projects and were responsible for scheduling and completing all components by the deadline. I was available to the students throughout the semester for consultation and met with several of them at various points to provide additional direction, training, and troubleshooting.

The second faculty member approached the oral history project from a different perspective. This professor was incorporating oral history into two sections of a lower-division course that allowed any student, from freshmen to seniors, to enroll. This meant that there were second-semester freshmen participating in the project, which was a marked contrast with the first faculty member's course. In addition, these two sections each had an enrollment cap of 25 students which was met for both sections, meaning there were 50 students of widely divergent ages and academic

experience involved in the pilot project. Also of note, in this course the oral history assignment was not given large blocks of dedicated time as in the special topics course. After the initial meeting between both faculty members and myself just prior to the start of the semester, I was not in contact with this faculty member until much later in the semester regarding the project. Ultimately these sections did not begin to talk about the project until just prior to spring break in March, leaving the students with far less time to complete their projects which involved the same amount of work. The professor dedicated one 75-minute class period in each section so I could explain the purpose of the project and teach the students the process of collecting these oral histories, although there was not enough time to go over the mechanics of using the recording software Audacity. However, the students knew that they could come to me for additional direction, training, and troubleshooting. Only a few students in this course took advantage of this option, and the requests came very close to the end of the semester.

### **Conclusions**

In spite of the short timeframe for development, the pilot phase of the Oral History Project turned out better than expected and provided some valuable insight into changes that will need to be addressed before undertaking it again. Some changes require the cooperation of faculty members, and some are more technical or procedural in nature.

One of the most important takeaways from the pilot phase was the necessity for sustained participation of the faculty and contact between the faculty and the archives. In the instance of the faculty member implementing the project in two large sections of a single course, it was difficult to know where the students were in the process and whether they needed additional instruction or support due to the lack of interaction. In addition, the faculty member did not share their course syllabus, so I did not have a clear understanding of how much time was being dedicated over the course of the semester to the completion of the project. In contrast, the faculty member teaching the special topics course met with me prior to the start of the semester to ensure that they understood the amount of time needed to invest in the project and that enough time was allocated throughout the semester for the students to complete all the required parts. This

information was then worked into the course syllabus.

The second takeaway from the pilot phase was how much impact a student's academic experience had on their interaction with the project. Students in both courses approached me informally a number of times. I observed that freshmen and sophomores struggled more with understanding the importance of oral history as a means to preserve and document individual experiences and the collective memory of communities. By contrast, students in their junior or senior year were able to draw on academic knowledge gained from other courses to contextualize the stories they were gathering and make connections to their own communities and personal experiences, providing a richer learning environment. This is significant information that will be used to educate faculty interested in incorporating oral history into courses in the future.

Another key learning outcome of the pilot project was that reducing the size of the groups to perhaps three students per group may help with scheduling issues that cropped up. Coordinating class and work schedules between four or five students was difficult for many of the groups in both courses, and potentially allowed some students to not fully engage with the project. Additionally, by reducing the size of the groups in the future students will be involved with more facets of the oral history process, increasing the impact of the project on their overall educational experience.

Finally, the pilot phase of this project has indicated that in order to help support faculty who are providing students with meaningful HIPs, as well as ensure a quality end product, the archives cannot undertake multiple courses or sections for different faculty who want to do oral histories in the same semester. It was far too difficult to manage the varied expectations and timelines for two different faculty members teaching two different courses with two different goals for their oral histories. In addition, the competing timelines impacted other archival projects. Near the end of the semester, I was inundated with last-minute requests for one-on-one training, meetings with students, and other technical issues that were difficult to work into a crowded schedule. Had there been a single course, these issues may have been less overwhelming and would not have impacted my own workload nearly as much.

In the end, the Oral History Pilot Project was a great

However, the technical knowledge gained throughout this pilot phase will help inform changes for the next set of oral histories, and provide a better experience for future students.

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#### **Appendix A**

- Oral History Release Form
- Pre-Interview Checklist
- Biographical Data Form
- During the Interview Checklist
- Field Notes and Post-Interview Checklist
- Audio Guidelines Checklist



**University of South Carolina Upstate  
Oral History Release Form**

Course Name / Number and Instructor:

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Date of Interview:

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Location of Interview:

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Name of Interviewer (please print):

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Name(s) of Narrator(s) (Interviewee):

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The oral history interview session you are about to participate in is part of a collaborative effort between the University of South Carolina Upstate Archives and Special Collections, the Office of Service-Learning & Community Engagement, and University of South Carolina Upstate teaching faculty to collect, preserve, and make available the unique stories and experiences of various communities within the upstate region of South Carolina. While this interview is part of a class assignment, the final products of the oral history conducted will be integrated into the overarching project, housed in the University Archives, and made available for educational purposes and public use through various electronic means, including the World Wide Web.

By signing the form below, you (the **Narrator / Interviewee**) give your permission for any audio recordings, video recordings, and / or photographs made during this project or submitted by you (the **Narrator / Interviewee**) as supplemental images, to be used by researchers and the public for educational purposes. These include, but are not limited to publications, exhibitions, presentations, the World Wide Web, and any other media now existing or later developed throughout the world. You also grant ownership of the physical property and the right to use the physical property that is produced as a result of your participation here (for example: the interview, audio / video recordings, photographs, and any written materials including biographical interview documents) to the University of South Carolina Upstate. By giving your permission, you do not give up any copyright or performance rights that you may hold.

I agree to the uses of the materials described in the paragraph above, with any restrictions noted here:

\_\_\_\_\_

Name (please print):

\_\_\_\_\_

Signature:

\_\_\_\_\_

Date: \_\_\_\_\_

Interviewer's Signature:

\_\_\_\_\_

Date: \_\_\_\_\_

Adapted from the following sources:

Roy, L. (n.d.). Oral history release form capturing our stories oral history program of retired/retiring librarians. Retrieved from <https://www.ischool.utexas.edu/~stories/training/release.html>

Hunt, M. (2003). The Smithsonian folklife and oral history interviewing guide. Retrieved from [https://folklife-media.si.edu/docs/folklife/interviewing\\_guide/InterviewingGuide.pdf](https://folklife-media.si.edu/docs/folklife/interviewing_guide/InterviewingGuide.pdf)



### **Pre-Interview Checklist – USC Upstate Oral History Project**

The following checklist must be completed **\*prior to\*** completing the recorded oral history interview:

Contact your narrator by phone to introduce yourself and your role in the project, and to explain what the goals of the interview are, and the steps in the process. Schedule a convenient time to complete the Oral History interview, and then send a confirmation of the time, date, and location **IN WRITING** to the narrator, either via email (if available) or postal mail.

Inquire about any additional materials that the narrator might want to deposit in the Archives along with the oral history. Documents, photos, or other materials enhance the archival record for future researchers, and help to provide additional context and insight. If the narrator would like to deposit materials such as these, please contact the University Archivist for further instructions.

Ensure the narrator knows that we plan to take a photo of them to include with the oral history interview, as well as a possible photo of them with their interviewer. If there are any objections to this, please inform your instructor.

Provide the narrator with a copy of the **Biographical Data Form** for them to complete and return to you **BEFORE** the interview session; alternatively, arrange a time to meet with the narrator to complete the form together either via phone or in person. This will allow you to use the information to complete your background research, as well as identify any areas that may provide good topics of discussion or questions for the recorded interview. If the information is incomplete or you are unsure of spelling, etc. contact your narrator for clarification.

Conduct **background research** prior to your interview. This may include research on the narrator, but should also include research into the time period of the narrator's life, the geographical area(s) where they have lived, and any significant social or political events that took place which may have an impact on their story.

From the Biographical Data Form and your background research, develop a **list of questions and topics** for the interview and save as a .doc or .pdf file using the file naming structure of the Oral History Project. You will refer to these questions and topics during the interview, but do not feel constrained by them. Allow the conversation to develop and flow from these questions, making note of any follow-up questions asked not on the list. You can also use this list to steer the conversation back towards points you would like to cover.

Assemble all the necessary forms you need for the interview:

- Release Form (2 copies)
- Completed Biographical Data Form
- List of interview questions and topics
- Verbiage for the interview opening announcement (see guidelines)

**Practice with your recording equipment!** Ensure you have the correct version of Audacity downloaded to your laptop (either Windows or Mac). Ensure that you practice with the external microphones, using your list of questions and a partner. Test the playback of the audio file. (see audio guidelines for additional information)

**File Naming Structure for \*ALL\* file types:**

[OH]\_[narrator LastName][narrator FirstName]\_[interview date YYYY.MM.DD]\_[type of file...release, audio, etc.]

**Examples:** OH\_MerrymanAnn\_2017.12.14\_releaseform

OH\_MerrymanAnn\_2017.12.14\_biographicaldata

OH\_MerrymanAnn\_2017.12.14\_audio  
OH\_MerrymanAnn\_2017.12.14\_transcription  
OH\_MerrymanAnn\_2017.12.14\_questionlist  
OH\_MerrymanAnn\_2017.12.14\_currentphoto  
OH\_MerrymanAnn\_2017.12.14\_suppliedphoto

**Interview Opening Announcement verbiage (use with each Oral History):**

"Today is [month-day-year] and this is [your name]. I am recording an oral history interview for the USC Upstate Archives with [narrator name] at [location of interview], discussing [topic of oral history interview]".



**Narrator Biographical Data Form – USC Upstate Oral History Project**

*Information from this form helps supplement data gathered during the actual oral history recorded interview. Please fill out each item, or write N/A if not applicable. Attach additional pages if needed. **PLEASE PRINT.***

**Name:**

**Nickname(s):**

**Place of Birth (City, County, State, Country):**

**Date of Birth (MM/DD/YYYY):**

**Father's Name:**

**Mother's Name (including maiden):**

**Paternal Grandfather's Name:**

**Paternal Grandmother's Name:**

**Maternal Grandfather's Name:**

**Maternal Grandmother's Name:**

**Sibling(s) Name(s):**

**Education (please list all education completed; include name of school and level / degree attained):**

**Former cities and states of residence with approximate dates:**

**Current occupation:**

**Brief list of past positions / occupations:**

**Marriage (dates, names, places):**

**Children (names and birthdates):**

### During the Interview – USC Upstate Oral History Project

The following checklist will help ensure that your interview flows smoothly. Ensure you have familiarized yourself with all the points included here prior to your interview date.

Allow approximately 1.5 – 2 hours for the interview.

The actual interview should ideally be about an hour in length, but you need to allow time to set up equipment, answer any questions, and then conduct the interview.

Make sure you bring a notepad and a pen to take down any notes or additional questions you ask.

Ensure the narrator reads and signs the Oral History Release Form (both copies). Ensure that the narrator understands that they may impose restrictions on how the interview is used (e.g. they prefer not to have the interview posted online but used only within the Archives), and that they retain copyright and performance rights to the material in the interview. ***We cannot accept or record interviews for which we do not have a signed Release Form.***

At the start of the interview, ask general "life history" questions first to establish a rapport with the narrator and provide context for the interview as a whole. DO NOT ask for any contact information including address or phone number on the recording.

Pay attention to and make note of any names, acronyms, or proper nouns that you (or a transcriber) might have difficulty spelling later on. ***Once the interview has ended, ask the narrator to clarify the spellings of these words.***

At the close of the interview, ensure that a photograph of the narrator is taken along with a photo of the narrator and the interviewer together. Do not use any Instagram or Snapchat filters or other photo manipulations; make sure the photo is taken in color, from the waist-up in good lighting so that faces are clear.



**Field Notes and Post-Interview Checklist – USC Upstate  
Oral History Project**

*Field notes and post-interview checklist should be completed as soon as possible following the completion of the interview, to ensure accurate recollections and impressions of the interview. It is recommended to complete field notes and checklist the same day as the interview.*

Narrator Name:

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Interview Date:

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Interview Location:

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**Post-Interview Checklist:**

Write up your field notes as soon as possible after the completion of the interview. This should include a description of why the narrator was chosen for the project, your personal reflections, your opinions about the interview process, notes on key themes or points, and future research ideas. It is also helpful to include a detailed description of the interview location, all other individuals present (including their roles assigned) as well as any unexpected topics that came up during the interview. These notes will assist you in writing your more polished and formal reflection paper.

Confirm you have the signed release form (2 copies: 1 for narrator, 1 for USC Upstate Archive).

Ensure photos of narrator have been taken.

Consistently name all files (audio, biographical data form, photos, etc.) according to the official File Naming Structure (see Pre-interview Checklist for specific format).

Send the narrator a written thank-you note.

Ensure that the audio file is exported as a WAV file and sent to the University Archivist as soon as possible. A working copy of the file can be returned to you if necessary.

Send the narrator a written thank-you note.

**Sensitive Content Checklist:**

Does this interview recording contain personally identifying information such as: a physical address, healthcare information, a phone number, social security number, or any other content that potentially poses a future privacy risk?

Does this interview contain confidential or sensitive information (about anyone) that USC Upstate should consider prior to making this interview available online? Examples: discussions of personal tragedies, medical conditions, sexual abuse, or violence. *I.e., if this interview were your story, is there anything in this recording that you would not want made searchable or available online?*

Does this interview contain criminal allegations against another party?

Does this interview contain potentially slanderous or libelous language pertaining to another living person?

Does this interview reveal institutional, trade, or corporate secrets?

Does this interview use culturally insensitive or biased language?

**FIELD NOTES: (give a substantive summary of the content of this interview; see post-interview checklist above. Approximately 500 words)**

**Additional interview questions asked that were not included on the Question Summary:**

## **Audio Recording guidelines – USC Upstate Oral History Project**

After consulting with other solo archivists undertaking Oral History projects around the country, the most widely suggested audio recording software for a project such as ours was **Audacity**, a free, open-source audio recording and editing software available for both Windows and Macs. The benefit to using Audacity is that it can export an audio file in WAV format, which is the preferred archival file type for preservation, providing consistency and stability to the Oral History Project in the long-term. **This is the preferred method of recording audio for this project.**

Audacity can be downloaded here: <https://www.Audacityteam.org/> Ensure you select the correct version for either Windows or Mac.

Here is a great article about getting started using Audacity for oral history projects: <http://ohla.info/getting-started-with-Audacity-for-oral-history/>

Record to WAV format at a rate of 16 bit / 44.1kHz (this is the default setting for Audacity).

## NOTES

1. Louis Starr, "Oral History," in *Oral History: An interdisciplinary anthology* 2<sup>nd</sup> ed, ed. David K. Dunaway and Willa K. Baum (Walnut Creek, CA: Altamira Press, 1996), 40.
2. Reagan L. Grimsley and Susan C. Wynne, "Creating Access to Oral Histories in Academic Libraries," *College & Undergraduate Libraries* 16, no. 4 (Oct-Dec 2009): 284, <https://doi.org/10.1080/10691310903355903>.
3. Frances Davey, Kris De Welde, and Nicola Foote, "Oral History as Inspiring Pedagogy for Undergraduate Education," *Our Schools / Our Selves* 25, no. 2 (Winter 2016): 110.
4. Patricia Leavy, *Oral History: Understanding Qualitative Research*, (Oxford: Oxford University Press, 2011), 28, EBSCOHost eBook Collection.
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6. Oral History Resources, Southern Oral History Program, UNC Center for the Study of the American South, last modified 2018, <https://sohp.org/resources-2/>.
7. "A Practical Guide to Oral History," Southern Oral History Program, UNC Center for the Study of the American South, 2014, [https://sohp.org/files/2013/11/A-Practical-Guide-to-Oral-History\\_march2014.pdf](https://sohp.org/files/2013/11/A-Practical-Guide-to-Oral-History_march2014.pdf).
8. Judith Moyer, "Step-by-Step Guide to Oral History," revised 1999, [http://dohistory.org/on\\_your\\_own/toolkit/oralHistory.html](http://dohistory.org/on_your_own/toolkit/oralHistory.html).