The National Trust Oral history guide

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Hannah James Louwerse

Doctorate Candidate at Newcastle University

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1 Introduction

Oral history captures personal stories and perspectives often missing from written records, adding depth and diversity to our understanding of the past and filling in the gaps in the main narrative. By recording these memories, Oral history ensures valuable insights are passed down, enriching future generations' knowledge of their history and heritage.

There is not a single, *one-size-fits-all* procedure of doing Oral history. There are general processes for documenting and curating Oral history, however these are often adapted to fit the needs of each unique group and circumstance. What is consistent across all Oral history endeavours, is its handling of *personal* histories. This personal material needs to be dealt with and cared for in a responsible manner. This guide has some basic information on the various stages of an Oral history process. The thorough planning of an Oral history process ensures that resources are allocated carefully, stakeholders' expectations are managed, and the entire process is set up in a safe and secure manner.

It is however important to note this is a guide, not a rule book. As previously mentioned, every situation will be different, so tailor the advice in this guide to fit your own specific situation. If you are interested in incorporating Oral history into a project or integrate it into your collection policy, it is advisable to contact people both inside and outside the National Trust who have experience of using Oral history.

2 What is Oral history

Oral history is the name of a sub-section of history which collects and studies historical information about people, communities, events, or everyday life using audio recordings, video recordings, or transcriptions of interviews. These recordings and transcripts are also referred to as oral histories. As of August 2024, there are nearly 1700 such recordings in the National Trust sound collection (catalogue code C1168) at The British Library.

Oral history strives to obtain information from different perspectives and most of these cannot be found in written sources. Without it, this side of history would be lost. It can give new academic insight into our history through thorough analysis on both a local and national scale, including how stories evolve over time and the creation of myths, legends and rumours including conspiracy theories.

Oral history can add value for the National Trust in several ways:

2.1 Enrich Collections

An oral history recording can be included in collections as a stand-alone item or as supporting material alongside other collection objects. For example, if an object is added to a collection, an oral history could be recorded to gather more contextual information on the newly acquired object. It might also be the case an oral history interview is collected instead of an object being added to collection, as a 'surrogate' for the object.

2.2 Support Staff

Oral history can help staff in their work by capturing institutional memory. Staff are then able to learn about their predecessors' work beyond the job description. They would also have access to information on how the site has historically been maintained, managed, and restored over time.

2.3 Engage Volunteers

The process of analysing, recording, and processing Oral history offers a wide range of opportunities for volunteers to develop new skills, including data management, Oral history interviewing, transcribing etc.

2.4 Create Visitor Experiences

Oral history can make installations and exhibitions more inclusive by using audio and create engagement beyond the geographic location of National Trust sites through for example the website or podcasts. It can also work as a source of inspiration for creative practitioners, who are commissioned to create interpretations for a site.

3 Planning

Whether developing an Oral history project or a wider Oral history strategy, planning any Oral history endeavour involves identifying its overall aim, which resources are required, and who will manage the various stages of the Oral history process. The purpose of planning an Oral history project or strategy is to ensure the process handles people's personal stories in a safe and secure manner, and to manage people's expectations of the endeavour.

3.1 Planning a Project

An Oral history *project* differs from an Oral history *strategy* because it is often focussed on one aspect of a site's history and likely has to work to a strict deadline. The deadline means it is important to not bite off more than you can chew during an Oral history project because

both listening back and analysing archived Oral history recordings as well as recording and interpreting new oral histories takes more time than you think. It is advised to thoroughly plan out the stages of the project, assign staff and volunteers responsibility over the various tasks early on, and set up regular progress reviews.

3.2 Developing a Strategy

An Oral history strategy differs in planning from a project simply because it operates over a longer period and aims to be more embedded in a site's existing processes. For example, responsibility over Oral history might be incorporated into someone's job description, Oral history training can be offered to staff and volunteers on an annual basis, and instead focussing on a particular topic, oral histories are recorded and used across a site's history using the existing collection policy as a starting framework.

4 Interpreting Oral history

Oral history, like any form of historical research, requires thorough analysis and examination. As subjective material it needs to be understood within the context it was created. There is much literature on the topic which will help in learning how to interpret Oral history recordings. An excellent starting point is *Oral History Theory* by Lynn Abrams. A more extensive bibliography can be found on the Oral History Society's website under further reading.

5 Legal and Ethical Framework

Oral history recordings are extremely personal material and are obtained from living people or people who exist in living memory; this means there are laws to be followed and ethical questions to consider. It is advised to have two to three members of staff form a type of ethics board in order to lead others in matters of ethics. Below the various elements of Oral history ethics are considered.

5.1 Copyright

An Oral history is regarded as a *recorded performance*, meaning those who have been recorded hold the recording's copyright. The recording can therefore not be used unless all of those who were recorded have signed their copyright over to the National Trust. This is done with a Copyright and Reuse form (See 6.3).

5.1.1 Newly Recorded Material

Newly recorded material cannot be used until the interviewee and the interviewer have signed over their copyright. In the case of the interviewee, it is common practice for them to

be sent a copy of the recording, transcript, and/or summary for them to check before they sign over their copyright. After reviewing their interview, they are then asked to sign over their copyright using a Reuse and Copyright Form. The Reuse and Copyright Form also gives the interviewee the opportunity restrict access to part of or the entire recording for a certain period of time.

Similarly, the interviewer could also sign a Reuse and Copyright Form, however, this might be inconvenient if they are recording multiple interviews. If the interviewer is employed by the Trust their copyright automatically transfers to the Trust. If they are freelance, it is advised to set up an agreement between the Trust and the interviewer which specifies that the copyright of all recordings automatically transfers to the Trust.

5.1.2 Archived Material

Copyright on Oral history recordings is a relatively recent concept, so many oral histories recorded in the twentieth century will not have the correct copyright documentation. If you wish to use an archived Oral history recording which currently does not have the correct copyright forms, you will have to try to obtain it from the interviewee or their next of kin. This also goes for the interviewer if they were not employed by the Trust or had a contract or agreement with the Trust at the time of recording. It is good practice to document the process of obtaining copyright, because if you are unsuccessful, you can register the material as an orphan work* if the interviewee was born over 100 years ago and you can evidence your attempt to obtain copyright.

*An orphan work is a work, item, or object created by an individual who did not sign over copyright and they and/or their next of kin cannot be found or contacted.

5.2 Data Protection

An Oral history is a recording of someone's personal stories meaning it, and its accompanying metadata, such as the Reuse and Copyright Form, all fall under the (UK implementation of the) General Data Protection Regulation (GDPR). The process of collecting, archiving, and reusing Oral history recordings involves obtaining and managing this personal data. This affects how Oral history material needs to be stored. It is therefore essential to plan the storage and management of Oral history material beforehand. It is recommended to contact the Data Protection team for further advice.

5.3 Sensitivity Checks

The aim of sensitivity checks is to identify if an Oral history recording contains possibly sensitive content. This evaluation of an Oral history's content is best done by a group of people, likely the staff members who are leading the Oral history endeavour. This can be done on newly recorded oral histories or archived oral histories, as what is considered sensitive or harmful content changes over time. There are two forms of sensitive content to look out for: content which could harm the interviewee, their family, or any third party mentioned; and material which could harm those listening or reading the Oral history.

5.3.1 Personal Sensitive Content

Content can be considered personally sensitive if it is not public knowledge and might harm the interviewee, their family, or a third party in their personal or professional lives. It is good practice to consider content about children sensitive unless the child mentioned is now over the age of 30 years. In the case of newly recorded Oral history, any information which is flagged as potentially being harmful to the interviewee, their family, or a third party should be brought to the interviewee's attention. They can then make a decision on whether they would like to restrict public access to this specific part of the Oral history. If personally sensitive content is found in an already archived Oral history, the matter should be discussed with the archivists or the person in charge of the materials' storage and access.

5.3.2 General Sensitive Content

When Oral history content is flagged as potentially harmful to the listener in newly recorded Oral history, the team should try to contextualise the information and add advisories to the recording before archiving. What is considered harmful in society evolves over time, so it might be beneficial to revisit the material regularly. If the team finds sensitive content in archived Oral history recordings, this should be mentioned to the archivists or the person in charge of the materials' storage and access.

5.4 Takedown

It is possible a site might be contacted by someone who wishes to have material removed from public access. People have the right to ask material, which includes the recording and its accompanying material, to be taken down or have restricted access for various legal and ethical reasons. For example, people can ask material to be taken down if they believe the National Trust does not have the appropriate copyright and/or the material does not comply with the applicable data protection regulations, but also if they believe that content is defamatory, obscene, or culturally insensitive. Takedown requests should be approach on a case-by-case basis and need to be thoroughly documented.

6 Documents

There are a number of documents used in an Oral history project, some legal and some informative in character. For the legal documents it is a good idea to talk to data management and copyright teams. The language in all documents should be clear and accessible. It is likely that each Trust site and Oral history project might require slightly different forms of documents depending on how sensitive the topic is.

6.1 Informative Documents

6.1.1 Information Sheet

An information sheet is given to a prospective interviewee or participant to inform them on what the Oral history venture entails. Generally, an information sheet should contain information on:

- what Oral history involves
- the project or the site's Oral history strategy
- who is running the project
- what role the interviewee or participant will play
- who to contact for further information

6.2 Legal Documents

6.2.1 Recording agreement Form

This form needs to be signed before any new Oral history interview is recorded. Generally, a recording agreement form should contain:

- A brief summary of the project or Oral history collection strategy
- An explanation on how the interviewee's personal data will be managed and who to contact if they wish to make a data enquiry
- A section where the interviewee needs to indicate they understand what they are agreeing to

6.2.2 Copyright and Reuse Form

It is necessary to have this form for the Oral history to be reused. In cases of newly recorded oral histories an interviewee and the interviewer will need to sign this after they have reviewed their recording, transcript, or summary. If an archived Oral history is found to not have the correct copyright permission this form needs to again either be signed by the interviewee or their next of kin, and likely the same will apply to the interviewer. See *5.1.2.*

for further information on subsequently obtaining copyright. Generally, a copyright and reuse form should contain:

- An explanation of copyright in relation to Oral history
- A section where the interviewee and the interviewer agree to sign their copyright over to the Trust
- An explanation on where the material is to be stored
- A section where the interviewee can place restrictions on access to their interview (for a period of up to 30 years)

7 Meta-data Documents

There is a lot of meta-data attached to Oral history recordings which offers context and makes it easier to search the material. Many archives will require this meta-data to be thorough and well put together.

7.1 Interview Data Sheet

An interview data sheet collects concrete information on the interviewee of a newly recorded Oral history for indexing and cataloguing purposes. This information gives basic context to the interview and can also include the technical details of the recording.

7.2 Index/Catalogue

Indexing or cataloguing newly recorded oral histories, whether for just a project or an whole Trust property, helps keep track of progress, preps the material for archiving, and creates a document which is easy to search on a later date. The index or catalogue will keep a record of some basic information about the interviewee, the interviewers, location, recording format, and its accompanying documentation. This will also give an oversight on whether relevant forms have been signed and scanned into the system and all of the recordings are catalogued.

It is good practice within the Trust to use the standard spreadsheet which has been designed in collaboration with the British Library so that you may deposit your recordings in the British Library in due course. You might however want to also create a version which contains summaries and key words for each recording to allow for better searching. If you wish to use the British Library's spreadsheet, please contact the Trust's Oral history lead.

7.3 Summaries and Transcripts

Newly recorded oral histories will need to be transcribed or summarised. There are advantages to both so it might be up to staff and volunteers what they wish to do. Transcribing takes longer, but does arguably give an objective account of what was said. Summarising is likely going to take less time and it can include terms which were not explicitly said. For example, someone talks about domestic work but only talks about cleaning and washing up and does not say the words 'domestic work'. However, summaries are more subjective and might lead to information being left out. Both should include timestamps so the listener can locate the corresponding part of the audio recording. When relistening to archived Oral history recordings missing information or mistakes might be found in the transcripts or summaries, in which case the archivist or the person in charge of the recording's storage should be informed. It might even be the case an Oral history has no summary or transcript, if one is created then it is good practice to give this to the archive.

8 Equipment

There are three forms of technology used during the Oral history process: recording tech, file management tech, and listening tech. Recording tech can include recorders, microphones, and SD cards. File management tech can include hard drives, card readers, and computers/laptops. Listening tech can include MP3 players, speakers and headphones. Each will have to work within the National Trust's existing system and be easy to use by staff and volunteers alike. It is advised to contact IT services for further advice.

9 Training

Because Oral history requires a specific skillset, training is **VITAL**, to ensure that the whole Oral history team has the appropriate skills to record and manage this personal data. The Oral History Society has a variety of training courses, including one on archiving which could be especially helpful if the newly recorded oral histories are going to be archived at the British Library. There is potential funding for training courses, but it is best to contact the Trust's Oral history lead for further information.

10 Collecting Oral History

When a decision is made to record new oral histories, extensive planning is required. To begin with, it is important to note how the recording of Oral history only makes up a small period of the entire process. There is a significant amount of preparation before the recording and plenty processing work after. In addition, after initial analysis of the recording more material might need to be recorded. Fully understanding and planning out this process is therefore essential, especially in the case of an Oral history project with a tight deadline.

10.1 When to Record

There are many reasons to collect Oral history, from expanding the collection to capturing institutional memory. However, collecting and handling is also a large commitment and requires a lot of resources. It is also important to note that Oral history is not without its carbon footprint and digital storage requires a surprising amount of energy. The benefits and value of recording new Oral history has to be measured against the resources it requires to produce and keep. There are ways to mitigate the number of resources required by recording fewer but higher quality oral histories or deciding to archive the Oral history material only partially or even not at all.

10.2 Who to Record

Generally, there are no strict rules on who should be recorded, but there are some things to consider. For example, it is very difficult to fully capture the stories of people no longer with us even if you interview their relative, an acquaintance, or next of kin. This is called post-memory and although it is used by oral historians, it needs to be contextualised properly and cannot be considered equal to interviewing the main person of interest. However, interviewing people with a relative or friend present in their recording session is fine, and can help the interviewee feel more comfortable.

Another thing to consider is the timing of the interview: specifically, how long the interview takes place after the event in question. How time affects our memory should be taken into account. This is especially important when collecting Oral history on traumatic events, where people might use the Oral history interview as an outlet. Using an Oral history interview as a form of therapy might not be done on purpose, but it is still a risk since an oral historian is not a trained counsellor.

Additionally, although it is tempting to record more extroverted and eloquent people, this should not be a main priority, sometimes it is the less obvious candidates that offer more intriguing insights.

10.3 The Interview

The skills required for an Oral history interview are different to those used by journalists and chat show hosts on the television. Oral history does not necessarily have a fixed agenda and it is likely the conversation deviates from the original topic or question. This can deliver some surprising and insightful results and should not be discouraged as the process of remembering is often messy and non-linear. Some useful tips and skills for Oral history interviewing are:

- The interviewee leads the conversation
- The interviewer goes with the flow and *never* interrupts the interviewee
- Make sure both parties are sitting comfortably and the atmosphere is casual
- Silence is allowed and gives the interviewee time to contemplate
- Conformation sounds like "umm" and "mmhmm" should be avoided as these affect the audio, facial expressions (nods) and hand gestures are a better alternative
- At the start of an interview the interviewer and the interviewee both introduce each themselves
- An Oral history is more an exploration of themes rather than a strict line of questioning
- Recapping what the interviewee said and double checking is recommended
- Do not worry if you do not cover every topic you had in mind

11 Wellbeing Support

The collecting and listening of Oral history can be an intense process. It is important to ensure everyone is comfortable and safe throughout the activity. For further information on supporting participants during the recording process, the Oral History Society have an advice page on recording and wellbeing.

11.1 Interviewee

The staff members who are leading the Oral history endeavour together with the interviewer, should collectively help any person being interviewed to feel comfortable. This is done by first ensuring the interviewee is well-informed on the process and has had plenty opportunities to ask questions. The interviewee needs to feel comfortable with the process, so it is not uncommon for them to pick the location of the interview. It is also important to consider if the interviewee is comfortable with the interviewer and vice versa.

Talking about the past can be very emotional. It is possible the interviewee might become uncomfortable with a line of questioning. It is up to the interviewer and interviewee how to progress in these situations. It is also important to note that Oral history is a very intense process, so it is advised for the interviewer and the interviewee to share a moment to deflate after the recorder has been turned off (this is often done over a cup of tea.)

11.2 Interviewer

The staff members who are leading the Oral history endeavour should offer the interviewers wellbeing support. This includes helping the interviewer reflect on an interview after a

recording session. It is also important that the interviewer never does more than one Oral history recording per day, as they can be emotionally draining. And it is considered good practice for interviewers to inform someone of where they are going for the recording session and when they should be back.

11.3 Transcriber

The listening and transcribing of an Oral history can be an equally intense process as doing the interview itself. The staff members who are leading the Oral history endeavour should support the transcriber in a similar way to the interviewers by ensuring they do not overwork, and debrief if necessary.

12 Storing Oral Histories

In nearly all forms of Oral history endeavours there will be a period when recordings, its meta-data, and any additional Oral history material needs to be stored somewhere. This includes archival storage and any interim or short-term storage.

12.1 Short-term Storage

Any Oral history material must be stored in accordance with applicable data protection law. It is therefore best to ask advice from the data protection team beforehand on the best way to handle this material. It is common practice within digital storage to make sure there is at least one or more back-ups of the data. This, in combination with data protection regulation, makes this interim storage not simple. It is advised to create an interim storage plan and assign a staff member responsibility over this period before the actual collection happens, be that research or recording.

12.2 Long-term Storage

Nearly all Oral history material needs to be maintained in some form, which is why it is important to consider its long-term storage to ensure it will last. The depositing location should be appropriate for the long-term storage the material as well as offering sustained access to the staff and volunteers of the associated Trust site.

The depositing of any Oral history material is best informed by whoever is responsible for the material's long-term care. Before depositing any material, it is important to check there is enough contextual information and that sensitivities have been identified and flagged.

Since the National Trust has an existing collection at the British Library, it is advised for material to be archived here.