

OHA Principles and Best Practices

Principles and Best Practices for Oral History

GUIDELINES FOR SOCIAL JUSTICE ORAL HISTORY WORK

Adopted October 2018. These documents replace the OHA's previous Principles and Best Practices, which were revised and adopted in 2009.

A web version of this report is available on the Oral History Association website:
<https://oralhistory.org/principles-and-best-practices-revised-2018/>

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Guidelines for Social Justice Oral History Work

Adopted 2022

In 2019, the Oral History Association's Council commissioned a Social Justice Task Force (SJTF) to develop a document of practice, which better serves vulnerable communities and assists practitioners seeking to center the narrator utilizing ethical and procedural standards. These guidelines will add to the organization's *Principles and Best Practices* suite. This report, sample templates, and glossary serve as a framework to clarify the meaning of social-justice-centered oral history and its practice from start to finish.

This document serves as a mosaic of collective experiences from oral historians who work on the ground with vulnerable communities. These oral historians learned from their narrators who deeply inspired the creation of new methodologies that interrogated standard OHA best practices. This occurred in four areas: project development, permission process, ownership, and protective and access measures. These distinctions became central to developing a social justice practice that took a narrator-centric focus that allowed for flexibility in project creation and completion. It also reshaped oral history into a perspective that welcomes extended timelines to reflect stronger trust relations and power sharing praxis. In short, social justice praxis "moves at the speed of trust," empowering the narrator at every step. This document condenses these experiences into a holistic piece that helps practitioners learn from this shared experience. It is also a directive that secures power and protection for narrators.

The SJTF composited a committee of oral historians who reflected diversity in race, gender, sexuality, age, region, and institutional/non-institutional affiliation. These participants translated their professional experience into a set of principles that embodied a more nuanced and complex outline of models for ethical practice. Although this outline appears to focus on a "social justice" format, it is important to acknowledge that it reflects the central nature of oral history work.

The Social Justice Task Force was guided by several essential questions which helped support its exploration of social justice oral history.

- What does it mean to conform oral history to those we learn from?
- How might our procedures, methodology, and intent change if we operate in conversation with the guiding principles of vulnerable communities and activists' ideals and missions?
- What does it mean to accept that oral history work is political, particularly with regard to social justice groups and vulnerable communities?

- How can we embrace this reality and operate accordingly?
- What are oral history ethics without accountability?

The SJTF answered these questions in two ways. First, it defined Social Justice Oral History by ethical and procedural focus on the narrator (concerns, vulnerabilities, and desires). Second, it centered on a consistent effort to co-create and share power. This approach challenged previous authority that heavily weighted the interviewers and future researchers over the narrator. This recentering process requires a flexible approach which may alter project course. This flexibility is guided by 1) action steps that move listening beyond the audio to listening with an ear toward power sharing before, during, and after interview, 2) redirection away from institutionalized ideological methods, 3) expanded community definition, and 4) extended accountability. Specifically, SJTF defines listening as project co-creation. If desired, community members are included within structure, preservation, access, usage, text production, and multiple other areas of hidden and not hidden processes in oral history creation.

First, these action steps nullify academic monopoly. SJTF centers the beliefs and/or needs of vulnerable communities over institutional practices, which historically normalize the institution's own standards as the only standard. Academic validation, institutionally-driven oral history projects, funding fixation, preservation expectations, and researcher interest must be subordinate to community stipulations. Ethically-centered oral history projects avoid extraction, exploitation, and entrenched power structures.

Second, extraction includes methods that are preconceived and preconstructed toward interviewer/researcher-centric interests. For example, researcher-centric approaches create permission forms that define narrator stories as secured contracts of ownership. Instead, social justice praxis sees community collaboration as a continuing relationship with an expectation of lifetime respect, active partnership, and free access. For extended conversation on these ideas, see the [SJTF reference page](#).

Third, these contentious power dynamics also directed SJTF's considerations in defining communities by circumstances that demand greater power sharing and protection community as a group of individuals who share a collective geographic space, experience, or level of ownership of the content being shared. SJTF recognizes the essential need to intentionally address vulnerable communities within these definitions to acknowledge both the insecure circumstances of many narrators and the rights of persons impacted, connected, or referenced by oral history participants.

Fourth, [Black Lives Matter surveillance](#), the [Sabaya](#) and [The Infiltrators](#) documentaries, and the Boston College [Belfast Project](#) cases demonstrate the obvious and pernicious perils of ignoring potential risks to narrators or narrowly defining community to active

project participants. The *Sabaya* documentary controversy reveals how filmmakers ignored the dangers posed by public exposure for Yazidi women brutalized by sexual exploitation, and issues around language differences. Black Lives Matter surveillance, *The Infiltrators* documentary, and the Belfast Project all illustrate how the state can use oral history to overpower institutions or target individuals. The Belfast case also demonstrates how the individual narrator is not the only consideration. All persons who knew, worked, and lived with the narrator may also face threat. In this case, and reflected in much social-justice-centered work, vulnerability is collective as much as it is individual. Oral historians who power share must actively raise questions about third-party interference as well as potentially respond to factors that may affect narrators and their communities.

SJTF sees accountability as a protective pre-measure for vulnerable communities or cases that may involve state or societal harassment and violence. Black, Indigenous, and LGBTQ communities are example groups which grapple with issues of protection around identity and activism. Some storytelling can make groups further susceptible to surveillance, harassment, and other forms of violence. As oral historians, we must enter this work with that consideration and understand the potential consequences. Having transparent conversations with narrators and community members will help center on their safety and well-being. Finally, this decision-making occurs within the context of an evolving relationship and recognizes how changing social and political contexts may invite a revisiting of these decisions.

Fundamentally, we believe that oral history must not only center the narrator, but that oral history work itself must be transformed and guided by the most vulnerable. Social-justice-based oral history reminds us to enact ethical oral history. As asserted by task force member Sherrie Tucker,

“We seek narrators not from the idea that their stories must be included in the historical record, but that the paradigms that excluded them in the first place are challenged and reshaped as a result.”

RECOMMENDATIONS FOR SOCIAL JUSTICE ORAL HISTORY

Introduction

Recommendations follow a similar structure to Oral History Association’s *Principles and Best Practices* documents. The SJTF is not fanatically attached to this formula but utilized the most familiar framework to the institution’s online instruction and arrangement. It is important to note that SJTF views social justice oral history as much a process as an ideological standpoint. This process starts before a project idea and inculcates within project outcomes space for fluidity, flexibility, and timelessness. To

that end, these categories are not hard boundaries. We also provided supporting documents that model social justice practice.

Project Planning

Self-Reflection and Self-Interrogation

Positionality is more than an individual background. There are fundamental questions regarding an interviewer's status in relation to the narrator, which may include issues around sensitivity, power, and intent. Each project coordinator must ask the essential question, "Are we the best people for this project?"

Other issues to consider: what harm might emanate from doing this project; what are the interviewer/institutional limitations within this project; how does this project empower, improve, or preserve community participants; have we crafted a mutually beneficial relationship with the community before starting the project; and in what ways do community participants support this project?

Pre-Permission

Interviewers should confer with potential participants to receive feedback on planned oral history projects and try to incorporate narrator ideas on methodology, timeline, and output. Consider how the narrator might need or require labor compensation, public acknowledgment, and/or other forms of support. Finally, review with participants how they conceptualize final presentation form, distribution of information, oral history as a form of advocacy, and archival preservation.

Outreach/Relationship Building

Outreach may take many forms, but interviewers should avoid moving from idea to implementation with little attention to relationship cultivation. Interviewers should also formulate and sustain consistent relationships. Interviewers can build relationships with community members over an extended period or share tools and strategies for community members to be their own oral historians. If interviewers lack such extended relationships, it is incumbent upon each person to immerse themselves in the literature, community, history, and/or culture of the designated narrators.

The outreach and relationship building process must address community concerns that oral historians authentically collaborate and work for mutual benefit, and it must clearly communicate to interviewees and other participants that oral history is not a transactional experience in which an interviewee gives and an interviewer receives.

Pre-Protection Planning

Interviewers must consider the possible elements of conflict, danger, or harassment associated with both the narrator and narration. Does the narrator's story potentially

cause physical or mental harm or trauma to the interviewer, the narrator's network, or the narrator? We must review risks with the narrator and consider potential availability of individual and/or institutional support. Along with evaluating protection needs, the interviewer should construct or review procedures on narrator anonymity safeguards.

Additionally, interviewers should recognize that trauma is not only situated in the present but follows from the past. It is important to read and process historical context to understand the powerful ways history informs the lived experiences of communities. This awareness helps to avoid assumptions that misconstrue historical trauma as failures of individuals or the community. Otherwise, the lack of awareness can act to recreate trauma and cause harm.

Language and Translation

Interviewers should work with participants to determine interview and translation language format and discuss how to ensure accessibility of interviews in the language of participants. Additionally, interviewers should consult with participants about translator choices and the final linguistic form(s) of the transcript.

Before the Interview

Informed Consent

Informed consent plays a key role in ensuring transparency. Here we suggest a more full-bodied approach to informed consent, which includes mutual understanding, review of privacy/access, shared power, and rolling consent, all of which are detailed below. However, it's also important to recognize that not all communities view the consent process, particularly the utilization of forms, as an acceptable format for establishing agreement or partnership. In these circumstances, oral historians and institutions must work with vulnerable communities to determine how to formalize oral history usage and preservation.

Mutual Understanding

Narrators may not share similar notions about oral history, terminology, and/or the processes around its creation, usage, and preservation. This ALL must be explained, including but not limited to verbal description or written glossary of terms. (See attached for example template.)

Project Background Information

Funding: Corporate, academic, and philanthropic funding shape oral history projects. These funding sources can direct narrator focus, geographical location, political impact, and they bring up many other issues that create power conflict between funder, institution, narrator, and interviewer. Narrators and oral history project participants should be informed of participating funding entities involved in projects.

Project: Interviewers should provide professional, experiential, and project background and should inform narrators of intended and potential usage.

Outcomes: Interviewers should review with narrators possible unintended third-party outcomes, dangers, or complications. They should also discuss preservation processes and detail short- to long-term access options for interviewees.

Privacy and Access

Narrators need a precise understanding of what access to their interview will look like, as well as consideration given to any third parties discussed within the recording. Anyone conducting or storing oral history interviews should take practical steps to guard interviews from unauthorized uses. Interviewers should also provide explanations on the security and preservation protection measures in place for interviews.

Shared Power

The standard Deed of Gift both inherently assumes that the item should be given away rather than being a shared enterprise and presupposes a shared definition of “gift,” dictated by the receiver versus the giver. A narrator-centered oral history agreement shares power. Additionally, it follows a praxis of “giving” that is neither fixed nor an instrument that obviates the interviewer or institution from further responsibility to the narrator. SJTF recommends incorporating a higher degree of shared power along with what SJTF member Amaka Okechukwu termed “rolling consent.”

Rolling Consent

Rolling consent restructures the fixed nature of the permission form by inserting checks and balances that reestablish or change consent as requested by the narrator. These circumstances might occur, for example, due to technological and exhibition decisions not referenced or explained in the earlier mutual understanding. A changing social and political context may also influence a decision to limit or expand interview access. Outreach is repeated and reconfirmed. See sample alternative form [here](#).

Participatory Power

Shared power introduces a thorough partnership, highly focused on narrator decision-making and concerns. This full-bodied agreement might exercise participatory power in multiple areas, including:

- Co-constructed consent and preservation form
- Automatic shared copyright
- Co-determined interview usage (rolling consent requires reconfirmation for interviews utilized outside mutual understanding)

- Co-created access levels centered on narrator, narrator family and associates, community, and then researchers
- Co-admittance (no firewalls) to all interview forms/outcomes for narrators, heirs, and other designated parties

Translations

All documents, particularly permission forms and other key documents, should be translated into the participant's language.

During the Interview

Interviewers should reiterate mutual understanding expectations and avoid jargon or academic rhetoric. If needed, provide a copy of glossary terms related to the shared consent for the narrator's records (see [SJTF glossary](#) as template). Interviewers should also provide primary and secondary contact information to the narrator should they have immediate or future questions.

The narrator may share information which they initially intended to exclude. Interviewers should always remind narrators that aspects of the recording can be withheld temporarily or permanently, along with the process for opening or closing private information.

After the Interview

Interview Notes, Time Log, Transcripts

Interviewer notes contain both the reflections of the narrator and the presumptions and/or assertions of how the interviewer understands the conversation. Though these materials are normally considered confidential and the possession of the interviewer, they ignore how the interviewer might act to usurp or ignore the narrator's own understanding of themselves and what they say. Narrators should receive a copy of audio, transcript, associated notes, time log, and proposed index to allow for clarification, challenge, and alteration to incorrect or unclear information or perspectives. While interviewers may wish to highlight or focus on a particular subject matter, the incorrect structuring of the log outline might mislead the researcher about the narrator's point, focus, or intent. Translate these documents as necessary.

Preservation

Decisions regarding preservation and archiving practices occur before the interview. Follow-up after the interview involves confirmation of these choices and a review of access policies both long-term and on a revolving basis. Considering that circumstances change for both parties (oral historians and institutions), a framework should be created which allows for free accessibility despite changes among persons or spaces.

Digital preservation is another tool for communities and organizations to maintain oral history interviews. Preservation will require long-term planning for the physical and financial maintenance of digital collections. Independent, community-based preservation will also require plans for sustainability. One way to address the issue is to have collective ownership of the material with requirements for each person holding the collection. In all cases, flexibility and creativity will be key for long-term independent preservation. Plan preservation of oral history interviews with an eye toward maintaining your collection well into the future.

Interpretation

Other considerations include community stakeholder collaboration on interpretation, dissemination, and presentation of oral history interviews. Work to create exhibit locations, types of media, and final projects that best suit access for narrator communities.

Considerations should also include how oral history projects operate not only to preserve history but also as a working tool for aiding community efforts for social justice.

Protective Considerations

State and institutional surveillance and harassment present complicated legal and ethical challenges to interviewers, organizations, and narrators. After narrators are informed of these possible implications, the interviewer and institution should address the issues of access, record keeping, potential disposal of sensitive materials, anonymity and protection protocols, confidentiality, etc. These considerations should be addressed within the context of mutual understanding and participatory consent. Protective methods might include:

1. Collection Restriction – limiting or closing collections for a specified period of time.
2. Deploying digital firewalls – This may require specific data security procedures to ensure that the information cannot be accessed, except by the oral historian or other authorized parties. Narrators should be assured about security measures that will be employed during and after the oral history project.
3. No Protective Consideration – Oral historians and archives must communicate that they have no special legal privileges or protections. These parties may be legally required to provide narrator information. In the event of a subpoena, the institution must turn over any records in its possession.
4. Using pseudonyms – In such cases, the oral historian should use only the fictitious name when referring to the narrator during the interview or in any related materials, such as transcripts, notes, finding aids, or publications.

5. Reviewing project release dates and considering embargo time frames to reduce potential harm.
6. Discussing protections for potential impact on family members, references, associates.
7. Limiting public marketing.
8. Providing legal assistance/consultation for individual participants left open to political harassment.

Sustained Relationships

The interviewer should consider sustaining relationships with narrators. This can include inviting narrators to future events sponsored by the interviewer or group, interviewer engagement with events that are narrator-driven, participation in educational outreach related to the project, consultations, or other mutually beneficial endeavors.

Conclusion

The SJTF does not presume to offer a comprehensive approach to Social Justice Oral History. Instead, we reframe oral history to embody the spirit of resistance reflected in/by those whose story we presume to preserve. We think about what it means to not only do oral history on social justice but also to do oral history in the spirit of social justice, in shared power and accountability. For continued learning on this approach, see the SJTF short list of references.

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