

# OHA Principles and Best Practices

**Principles and Best Practices for Oral History**

**FOR PARTICIPANTS IN ORAL HISTORY INTERVIEWS**

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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## For Participants in Oral History Interviews

Oral history interviews are conducted by people from a diversity of fields and professions. They may be academic researchers, community organizers, artists, documentarians, and more. How they approach their work and communicate with you may be very different. However, there are several key ethical responsibilities which oral historians of any background share.

We have summarized these here to help you, the participant, make an informed decision about whether to contribute to an oral history project.

### Before the Interview

The following information should be made available to you in a language that you can read or speak fluently, or with the assistance of a trusted translator:

#### *1. The project background*

The oral historian should talk with you about the motivations for initiating the project and conducting your oral history interview, as well as what they hope you might be able to contribute to the project. The oral historian may ask you to make a formal declaration, which could either be recorded or in writing, of your agreement to participate in the project and your knowledge of the process. Make sure you understand and are comfortable with what the oral history project seeks to achieve.

#### *2. Contact information*

You should receive contact information for your interviewer; someone responsible for the archive, website, or other repository where your oral history materials will be housed and/or made available for public access; and (if applicable) a project director and/or ethics committee contact.

#### *3. The process for participation*

The oral historian will explain to you the full oral history process, from how it begins to when it should be considered finished. This explanation should include:

- a. how long the interview will take;
- b. how it will be recorded;
- c. whether you will have the opportunity to review the recording, transcript, or other related materials before they are shared in any format;
- d. any other details that may be relevant to the experience of being interviewed

- e. what your rights are;
- f. any other details that may be relevant to the experience of being interviewed.

#### *4. The benefits of participation*

Each oral history project is different, and the value of certain benefits may be different for you than for another contributor. As a participant, feel free to discuss and negotiate possibilities with your oral historian. Potential benefits may include the following:

- a. The project may align with your personal interests or goals.
- b. You may be given copies of the interview and related materials to use or share.
- c. Your community may be given special access to the records produced.
- d. The oral history project may provide some other service to your community, such as workshops or events.
- e. There can be personal or intangible benefits, such as the possibility of contributing to the historic record.

#### *5. The potential risks of participation*

In addition to the potential benefits, you may have concerns related to your participation. You should feel free to discuss your concerns in detail with your interviewer so that you can come to an informed decision before the interview begins. You are within your rights to ask questions, including what steps have been made to minimize the risk of physical, psychological, social, or economic harm to you. Standard oral history practice calls for making the interviews accessible to researchers and the general public, but you are free to request confidentiality or even to withdraw from the project at any point prior to its completion, or the time at which the material is made available (See “Altering or Withdrawing Your Oral History Interview” below). Understanding the following key subjects will be helpful to you in such conversations: privacy, private information, pseudonym, identifiable information, confidential, anonymous.<sup>1</sup>

### **During the Oral History Interview**

#### *6. The interview*

The actual process of being interviewed can feel like a conversation, but there are important differences. Most interviewers will limit their own speaking so as to focus the interview on your experiences and memories. Keep in mind that at all times you are free to not answer questions, to take a break from recording, or to end the interview. You are not required to discuss any topics that make you uncomfortable or cause you

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<sup>1</sup> See the [OHA Glossary](#).

distress. The interviewer should not pressure you to change your mind, although they may ask you why you would prefer to not to speak about a particular subject in order to understand why you are choosing to avoid it. If the questions you are asked are not clear or seem irrelevant, you may ask for clarification. You should feel free to think about how you want to respond and take the time necessary to answer the question fully.

### *7. The recording process*

The interview is recorded, sometimes with a simple audio recorder or perhaps with professional video recording equipment. Your interviewer will place the equipment to get the best possible recording. Work with them to make certain you are comfortable throughout the process. While you might be distracted by the recording equipment when the interview begins, most participants are able to easily focus on answering questions and sharing stories as the interview proceeds.

## **After the Oral History Interview**

### *8. The intended use of the interview*

The oral history interview may result in certain materials such as an audio or video recording, a written transcript of the recording, detailed notes on the information you provided, pictures of you, or other related records. These materials may be given to an archive or other repository to be housed long term and/or made available for public access. They may also be used in publications, websites, events, exhibits, and other public resources. The interviewer should explain to you the intended use of these materials, how they will be cared for, and how they may be accessed by others. Understand that these intentions are not a guarantee. The oral history interview and related materials may never be used at all. Additionally, over the long term, there may be changes to how such materials can be made accessible to the public, preserved, or cared for as technologies and institutions change. In such cases, those responsible for the long-term care of your oral history materials should respect your initial intent for their use as much as possible. If the oral historian is aware in advance that such changes could take place, they should let you know.

### *9. Altering or withdrawing your oral history interview*

When the interview finishes, you are welcome to raise questions or concerns about the interview or the oral history project. Know that you can restrict an interview from the public, make changes before it is shared, or withdraw your interview even after you have recorded your oral history interview and/or, in many cases, signed a formal agreement. Depending on the plan for long-term storage and access, this may be handled in a variety of ways. The oral historian should be able to share any information related to withdrawing your interview.

Once an oral history is shared with the public, or entered into an archive, it may not be possible to fully remove it. Once an oral history is available to the public, a third party may quote, use, and reference it in another way that the oral historian has no control over. The oral historian should, when possible, specify a date by which it would become difficult or impossible for you to withdraw your oral history.

Be aware that even if an oral history is closed to the public for a period of time, certain legal challenges—such as subpoenas or open-record requests—may make some restrictions unenforceable.

### *10. Formal agreement<sup>2</sup>*

At the conclusion of your interview, the interviewer should request a written or verbal declaration to formalize the agreed upon terms of use for the recorded interview. This process is often referred to as legal release. In recognition of the fact that you, the narrator, own the words you speak in the interview, the formal agreement is your opportunity to provide permission for others to have access to and use your interview. On this legal release, you may provide a blanket permission for the public to access and use your oral history, or you may decide to place certain restrictions on its use. Speak with your oral historian about the options.<sup>3</sup> After consenting, you should receive a copy of the legal release terms. If you or your interviewer prefer not to use a written agreement, this should be discussed in advance.

### *11. Copyright*

When you sign a legal release, you might also be asked to assign your copyright of the interview to the oral historian or to an archive, as part of, or in addition to, the release document. You may also be given the option of assigning your interview to the public domain or of signing a Creative Commons license. All of these options are in place so that others may quote from your interview in books, on radio, in films, or other media. Libraries and archives often wish to hold copyright so that they can protect the materials now and long into the future. Ask your interviewer to explain the document you are signing and, if you wish, other options that exist for planning public access to, and use of, your interview. Note that any time you sign a document, you should request

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<sup>2</sup> We recommend that this process be fully documented in writing and that signatures of all participating parties be obtained and preserved in project records. However, we recognize that limitations of time, language, literacy, and other factors may make this recommendation unfeasible; in those cases, we recommend both the communication of the goals and risks associated with the project along with interviewee informed consent be recorded prior to the beginning of the interview.

<sup>3</sup> While “legal release” is the often referred-to term, there are other terms that might be used. See the [OHA Glossary](#): informed consent, formal agreement, permission to use, copyright, deed of gift, non-exclusive license, creative commons, public domain.

a copy of that document to refer to later if needed. Understanding the terminology is important; always feel free to ask questions when in doubt.



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