

OHA Principles and Best Practices

Principles and Best Practices for Oral History

OHA STATEMENT ON ETHICS

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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OHA Statement on Ethics

Oral historians have ethical obligations that are both specific to oral history methodology and shared with other methodologies and practices, ranging from anthropology to archival work. Ethics encompasses the principles that should govern the multiple relationships inherent in oral history. Everyone involved in oral history work, from interviewers and narrators to archivists and researchers, becomes part of a web of mutual responsibility working to ensure that the narrator's perspective, dignity, privacy, and safety are respected. This statement draws upon the decades of thoughtful work concerning the appropriate way to engage with humans as participants in research projects.

Here we offer general principles for practicing oral history in an ethical way. These points represent the beginning of the path toward becoming an ethical oral historian, rather than its culmination.

Preparation and Communication

Oral historians strive to become fully informed about oral history theory, methodology, and ethics. They work to become informed of oral history practices, including how narrators and interviewers should be treated equitably, with care and respect. One way to help ensure fair treatment is to create a beginning-to-end process that works for everyone involved. This process should entail, at minimum, four points:¹

1. Prior to beginning the interview, the interviewer obtains the narrator's informed consent, which means, most generally, documenting the knowing agreement of the narrator to participate in the process and overall project, as described in "The Core Principles of the Oral History Association."
2. The interviewer clearly communicates the goals of the project, the potential risks of participating in it, and the proviso that, once accessible,² the oral history can

¹ 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.

² The ultimate plan for what happens with the interview once it is completed should start before a narrator is approached about participation, and well-before an interview is conducted. For full transparency and strong project planning, the process for care and access of the recorded interview should be mapped out in the early stages of the process.

be used³ in any number of ways, by any number of potential users. While oral historians strive to protect the narrator, they are careful, at every point in the process, not to make promises that they cannot keep.

3. The interviewer provides the narrator, whenever possible, with the opportunity to review and approve the interview (recording and/or transcript) prior to using the interview, depositing it in an archive, or otherwise making it accessible to the public.
4. While developing this process, oral historians should conduct preliminary research about the topics they intend to study and be comfortable with the recording technology they intend to utilize.

Collaboration: The Oral History Interview

The interview is at the heart of the oral historian's work and thus requires extra attention to ensure that the encounter meets ethical standards.

Oral historians should consider the goals of the research project and seek narrators who are able, collectively, to present a variety of points of view. When contacting potential narrators, interviewers should clearly and plainly share the project goals, explain the interview process, and describe what will happen to the interview after it is completed.

Power operates in every human engagement, and no less so in oral history interviewing. Ethical oral historians take care to give serious reflection to power differentials, implicit bias, potential areas of disagreement, and other instances in which their positions do not align with the narrator. Choice of interview strategy, such as possible topics covered, the language in which the interview is conducted, or question phrasing, should be part of the consideration. Oral historians recognize the differences that might exist between themselves and the narrator; they consider how these differences might impact the way a narrator shares memories; and they strive to treat each narrator equitably and do their best to listen with empathy.

During the course of the interview itself, oral historians attempt to minimize potential harm to the narrator, communicate the narrator's right to refuse to answer questions, and honestly describe their institutional, professional, political, and other affiliations, as well as obligations and demands. They continue to safeguard the trust implied by the oral history process and to work through competing interests in fair and impartial ways.

³ For example, in printed publications (monographs, pamphlets, journals), text in museum and web-based exhibits, examples used in pedagogy (both K-12 and higher ed), performances (plays, ballet, opera, monologues), and others.

After the interview, oral history ethics strongly recommends that the narrator be given the opportunity to review the interview (recording and/or transcript) and approve what was said for public release or other use. This step sets oral history apart⁴ from other methodologies⁵ in that it ensures that the narrator's account enters the public record⁶ and that future researchers who wish to draw upon these accounts can access them in their entirety—not just excerpts that may lack important context. The interview should not be made public until the narrator, as the original recording's copyright holder, has provided formal authorization to do so.

Stewardship: Preservation and Access

Oral history is unique, in part because the collaboration between interviewer and narrator results in a historical document for posterity. In most instances, the interview and supporting material⁷ is made available to the broader public through deposit in an archive, distribution online, and/or any number of other methods for providing public access. Because of this, ethics calls for narrator review and approval.

There are many valid options for managing the review process; thus, ethical oral historians plan ahead and develop a process that works in their specific context, while adhering to the principles outlined here. Options for narrator review include the right to delete, restrict, and/or redact portions of an interview; the ability to add clarifications and correct mistakes; and the choice to keep the interview closed to the public until a set date or to decline to release it to the public in the first place.

Oral historians should establish a clear procedure⁸ (including dates or a timeline) for finalizing, archiving, and releasing the interview to the public. This step communicates to the narrator that the process has been completed and that the interview is (or will be) preserved and made accessible to the public.

Oral historians should promote equitable access to the final interview (recording and/or transcript) and attempt to make these materials accessible in a timely manner. Oral historians and their archivist partners clearly document relevant metadata so that future users will know easily who was interviewed, when and where the interview was

⁴ What also sets it apart: The oral historian's unique responsibility and skill in co-creating, co-representing, and co-interpreting.

⁵ Such as interviewing methodologies that are journalistic, anthropological, folkloristic, sociological, or linguistic.

⁶ Whether the plan is to share within a family group or with the public at large, it is important to have a plan there is a plan for long-term care of, and access to, (whatever that means for the project) the recorded interview.

⁷ Transcript, images, artifacts, indexes, etc.

⁸ We recommend reviewing the Society of American Archivists' Core Values Statement and Code of Ethics (<https://www2.archivists.org/statements/saa-core-values-statement-and-code-of-ethics>).

conducted, and other key pieces of data about the interview. As the interview is prepared for preservation, decisions about description, categorization, and access should respect the personhood and desired privacy of the narrator. Moreover, oral historians should educate themselves about legal concerns such as libel, invasion of privacy, and other issues that might endanger the narrator.

One goal of the agreed-upon oral history process is that it allows the narrator to make an informed decision about whether to participate in a project and to make the interview public. An ethical oral history process assures that the narrator is fully informed about the many possible uses of the oral history once it is publicly available.

Using Oral Sources⁹

The core of the oral history process concludes once the narrator has approved the interview and, in most instances, plans have been made for it to be preserved and made available to the public. Still, scholars and other users of oral sources, including oral history interviews, should educate themselves about discipline-based resources and ethical guidelines that detail issues in more depth. Oral historians who intend to use the oral sources that they create or oral sources created by others should endeavor to use the oral histories honestly and respectfully. This means users of oral sources should provide analyses, including when edited or excerpted, that remain true to the words and meanings offered by the narrator and take care to not quote words out of context or otherwise contort the original meaning. Users may arrive at conclusions that diverge from those offered by a narrator, but conclusions should be derived from evidence properly cited.

⁹ We recommend users of oral sources consult various discipline-based ethical guidelines. For example: the American Historical Association's [Statement on Standards of Professional Conduct](#); the American Anthropological Association's [Principles of Professional Responsibility](#); the American Sociological Association's [Code of Ethics](#); and the Society of Professional Journalists' [Code of Ethics](#); the Society of American Archivists' [Core Values Statement and Code of Ethics](#); the American Folklore Society's [Statement on Ethics](#).



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