

美国口述历史协会通用原则与最佳实践

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2018年10月实施

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术语表

以上文件是美国口述历史协会通用核心原则与最佳实践的最新修订版本，于2019年实施。

简介介绍

我们工作的历史背景，1966-2009——肖娜·格拉克（Sherna Berger Gluck [1]

2018版《美国口述历史协会通用原则与最佳实践》，如同在过去五十年里发布的每一版，都是其时间的产物。自1968年最初版本《口述历史目标和指导方针》(Goals and Guidelines) 首发以来，五十年每一版本，每一版本都是其时代的产物，2018版也不例外。五十年间，美国口述历史从业人员数量不断扩大，相关学科模式转变，均使口述历史理论和实践愈加复杂、微妙。

据阿利斯泰尔·汤姆森（Alistair Thomson）描述，口述历史理论实践迅速发展，已经历了四个范式转变，每次转变都体现在美国口述历史协会各项标准和指南[2]中有所体现。

在欧美早期的口述历史运动中，虽然参与者关注点不同，但大多仍将口述历史作为一种数据，汤姆森称其为“战后的记忆作为“人民历史”的一种原始资料的复兴”[3]。这是因为口述历史成立初期，大多成员都是职业历史学家或档案管理学家，他们的思维具有经验主义/实证主义特色，并将口述历史看做客观的学科处理[4]。他们的思维也体现在了1968年《口述历史目标和指导方针》中。在保持理论基础不变的同时，1979年协会通过了《口述历史道德指南》，该文件实质上为参与口述历史各个阶段的人提供了理论遵循依据。

1980年代，口述历史学科发生了新的转变。当时口述历史人雨后春笋般涌现，他们背景更加多元化，在协会内外均受到更大关注。此外时代大背景下，文化研究和女权主义实践也逐渐获得了更大的影响力。据当时合编最早的一部口述历史选集的学者指出：“现在，业内就口述历史的目的产生了争论：口述历史应当是（1）还原真实历史的原材料还是（2）从口述素材中构造历史的过程？”[6]在欧美新一代口述历史学家的努力推动下，70年代末和80年代初，这种讨论层出不穷，汤姆森称其为“记忆与主观性的后实证主义研究方法下的发展。”

早在1979年，时任美国口述历史协会主席的瓦迪·摩尔（Waddy Moore）就注意到了口述历史

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《2018年通用原则与最佳实践》概述——特洛伊·里夫斯 (Troy Reeves) 和莎拉·米利根 (Sarah Milligan)

为了撰写《2018年通用原则与最佳实践》，口述历史协会主席托德·莫耶 (Todd Moyer) (2017-2018) 召集了一个由12名成员组成的工作组，由我们负责管理。工作组成员特意选自不同背景，他们来自历史学会、社区组织，有职业历史学家，也有独立学者，横跨不同地区、年龄、性别、种族，经历也尽可能多元化。

委员会工作量很大，因此我们融入了视频对话、电子邮件和分组工作等模式。委员会先查阅了历史文档，就此交换意见；然后参考了相关学科的组织运行和语言研究方法，从中汲取灵感；最后制定工作优先事项，即一年之内究竟可以完成些什么。我们深刻意识到本文将在网上公开，有大量不同的受众，大多有其特定的导向需求，因此我们也讨论了如此文本可以起到什么作用，应当起到什么作用。工作开展不久，我们就意识到，本文目的不再是陈述单一的“通用原则与最佳实践”，而是展现一系列的声明和指南，要针对多元化的观点和需求。

与工作组成员进行初步讨论后，我们确定了四个核心文件，要优先完成：

(1) 定义协会基本理念核心价值观的声明文件；(2) 概述口述历史学工作的最佳实践声明文件；(3) 明确行业道德规范的文件；以及(4) 从业人员权益阐述性文件，供从业人员在进行合乎道德的实践中进一步了解自己的权益。当然，指导文件系列还有待完善，在此次工作过程中，我们收到了小组内部以及协会其他成员反馈并进行了汇总，为执行委员会未来工作提供建议。

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另外，本版本还再次强调了对叙述者及其社区的尊重，以及对弱势群体关注的重要性；强调访问员和叙述者之间的动态协作关系，致力于持续性参与和投入，强调对权力、差、条件、差、利益差和期望差异的敏感度。这些原则已包含在上面列出的四个文档中（核心价值声明文件，道德规范文件，最佳实践声明文件和参与者权益阐释文件）并同时体现在本文术语表中，术语表能帮助我们更深入地明确某些术语的含义。

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最后需要指出两点：首先，如上所述，我们能做的而且应该做的事情还有很多。在一次电话会议中，我们将本次工作称为“打框架”。虽然我们为自己的付出感到自豪，也为此负有责任，我们理解这项工作远未完成，我们欢迎未来人士在我们的基础上继续补充，也希望能够激发更多的人参与其中。其次，我们这些文档中道德伦理章节是核心，该部分的中心思想为“本文仅列出了最基本的要求，是口述历史学家的道德基础，而不是最高的境界。”这句描述对其他几个章节也适用，文中的思想和观念仅仅是成为一名合格口述历史学家的开端。

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我们非常感谢工作组成员-瑞安·巴兰 (Ryan Barland)、道格·博伊德 (Doug Boyd)、艾德里安·凯恩 (Adrienne Cain)、舍娜·伯格·格鲁克 (Sherna Berger Gluck)、艾琳·杰西 (Erin Jessee)、李·卡琳达 (Calinda Lee)、雷切尔·米尔斯 (Rachel Mears)、马丁·米克尔 (Martin Meeker)、托马斯·萨默斯·桑多瓦尔 (Tomas Summers-Sandoval)、丽兹·斯特朗 (Liz Strong)、萨迪·沙利文 (Sady Sullivan) 和安妮·沃克 (Anne Valk)，感谢他们在这项工作过程中的持续投入，自愿贡献自己的时间和专业知识，确保这些文件能够顺利完成，传达了口述历史学家应具备的特性。

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[1] 格拉克的介绍借鉴了唐·里奇 (Don Ritchie) 早期著作《道德指南的历史》 (<http://www.oralhistory.org/wp-content/uploads/2009/10/History-of-the-Evaluation-Guidelines.pdf>) 以及她自己担任2018 OHA 原则和最佳实践工作组成员的经验。

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[2] 阿利斯泰尔·汤姆森，“口述历史中的四种范式转变”，《口述历史评论》34，第1期 (2006年夏/秋)：49-70页。有关口述历史较长的历史性描述，请参见丽贝卡·夏普莱斯 (Rebecca Sharpless) 《口述历史手册》中的“口述历史”。托马斯·查尔顿 (Thomas Charlton)，路易斯·迈尔斯 (Lois Myers) 和丽贝卡·夏普莱斯 (Rebecca Sharpless) (马里兰州拉纳姆：AltaMira, 2006年)。

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[3] 汤姆森，“四种范式转变” 51页。

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[4] OHA领导层在报告1969年通过的《口述历史目标和指导方针》时指出“所有有关方面都有机会和义务使这种历史来源尽可能地真实和有用”；《口述历史通讯》1969年3月刊第一期。

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[5] 《口述历史道德指南》文件是OHA 领导在威斯康星州拉辛市翼展会议会场 (Wingspread Conference Ground) 的一次会议中制定的。请参阅里奇的“道德准则的历史”。

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[6] 戴维·邓纳威 (David Dunaway)，“介绍：口述历史的跨学科性”，《口述历史：一种跨学科文集》，第2版，邓纳威和威拉·鲍姆 (Willa K. Baum) (1996年，阿尔塔米拉，核桃溪出版Walnut Creek, CA: AltaMira, 1996)，第8-9页。

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[7] 瓦迪·摩尔 (Waddy Moore)，《口述历史通讯》社论，1978年春季

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[8] 在通过技术更新的布法罗 (Buffalo) 会议上，与会人员回顾了在一个不同的会议上进行的漫长而充满活力的讨论，有时甚至是激烈的讨论。在进行了漫长的第一次讨论之后，委员会回到了纳入建议的更改话题上，在又一次漫长的讨论之后，通过了新的指南文件。

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[9] 里奇“道德准则的历史”。

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[10]OHA成立之初就一直在争论如何称呼接受采访者这个问题，尽管1967年的讨论没有达成共识，但直到2009年一直使用的是“受访者”。《口述历史通讯》1967年1月刊第1期。由于在修订后的文件上一直无法达成共识，因此在采访中仍使用第二个版本。

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美国口述历史协会核心准则

美国口述历史协会的核心准则

1. 无论是在口述历史协会国家专业组织，还是其地区专业组织中，口述历史人都是来自不同社区、不同背景、不同学术和专业领域的人士，其中许多成员可能并不自诩为口述历史学家。但是，无论是出于学术研究、政治或社会变革、还是保护历史、教学、亦或其他目的，口述历史实践的原则都是通用的。本文件罗列出了其中的一些指导原则，同时收录了关于收集、阐释、使用和保存口述历史的各种实践。

什么是口述历史？

2. 口述历史既指访谈过程，也指录制的口述访谈资料访谈资料（音频、视频或者其他格式）。为了收集和保存关于过去有意义的信息最大化所收信息的意义，口述历史学家可能会倾向于收集叙述者的生活历史个人生命史，或者进行专题采访，在这些访谈中，叙述者拥有关于特定历史主题或事件的知识。或采访某一历史主题或事件相关的人事。待访谈结束后，这些素材如果这些素材被存储在档案馆中，经访问员和叙述者的允许同意后，也可用于其他实践另作他用。

3. 口述历史记录人们的经历，并将其置于更大的社会历史背景下，这是口述历史的主要价值。采访是一项有效记录，帮助人们保存过去事件、个人或集体经历，也有助于人们理解并构建历史。由于口述历史是基于记忆的[1]，因此具有主观色彩，对过去的回忆受到不断变化的个人和社会环境影响。

4. 访问员与叙述者之间的动态协作关系是口述访谈的重要特点。访问员基于事先调研调查和准备向叙述者提问，叙述者则根据自己的判断，选择相关且有意义或适合分享的内容完成访谈。尽管采访过程受双方互动影响，具有主观特性，但其本质仍是有周密的准备和遵循既定流程的学科。

指导原则

5. 口述历史从访谈阶段到保存、使用和公众访问的过程中，都必须本着尊重叙述者及其所在社区的原则，要遵循道德规范，尊敬对方的文化价值观、认知方式或观点。

6. 6. 采访全过程必须保持透明，从采访者与叙述者第一次见面，到最终作品的呈现，各方均需持续参与、知情同意以及全力投入。

7. 7. 口述历史人必须保持敏感，要留意访问员和叙述者之间的权力差异，同时要注意，口述历史与其他社会关系相同，参与方均有自己的利益和期望。这些动态因素影响口述历史访谈过程的各个方面，如：选择谁来采访？采访应当问什么，怎么问？应该和受访者如何互动？叙述者的回复应如何理解？采访素材是否应公布于众，是否应限制开放权？采访素材究竟应用于哪些用途？

8. 8. 为了尽可能保护叙述者和访问员的安全，尤其是在涉及弱势群体时，应考虑删减某些采访文本，或限制完整文本的公众访问。在采访开始前，应充分考虑所有规定，并让各方明确，规定在访问进行中可以重新协商。

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9. 口述历史访谈及其相关的文档应尽可能的保存以及供其他用户访问。口述历史人必须清楚了解采访资料的存储、公开和使用的各种方式。同样，必须得到叙述者明确许可才可以公开采访，并且在条件允许下，让叙述者规定资料保存、访问和使用的标准。

~~While oral historians are bound by laws covering copyright, and in some institutions might be bound by regulations governing research involving living human subjects, their responsibilities also go beyond these official rules. They should conduct themselves ethically and thoughtfully and be vigilant about the possible consequences to narrators and their communities of both the interview process and the access/use of completed interviews.~~

[1] 口述历史和记忆的交集有据可查。进一步了解此概念，请参阅《口述历史评论》：<https://academic.oup.com/ohr>

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~~OHA Statement on Ethics~~ ~~口述历史协会道德声明~~

~~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.~~

~~口述历史学家负有道德义务，这些义务不仅局限于口述历史业内，同时也是其他相关领域（从人类学到档案学）的共同准则。伦理道德包含多重原则，这些原则应指导构建口述历史的多重关系。从访问员、叙述者到档案管理员和研究人员，所有参与口述历史工作的人都会肩负起共同的责任，以确保叙述者的观点、尊严、隐私和安全得到尊重。数十年来，各大组织为了保护参与者权利已积累了许多经验，以此确保参与者受到合理的待遇，本声明正是借鉴了前人的经验。~~

~~这里，我们从伦理的角度提供了口述历史的通用原则。本文仅列出了最基本的要求，是口述历史学家的道德基础，而不是最高的境界。~~

~~Preparation & Communication~~

~~访前准备&交流~~

~~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^[1] should entail, at minimum, four points:~~

~~口述历史学家要努力全面了解口述历史理论、方法论和伦理道德。要努力在理论指导下完成实践，包括如何确保叙述者和访问员之间的平等，关心和尊重各方利益。想要公平对待叙述者和访问员，就要制定一项照顾参与各方，且涵盖整个采访的流程。该流程^[1]至少应包括以下四点：~~

~~Prior to beginning the interview, the interviewer obtains the narrator's informed consent, which means, most generally, documenting the knowing agreement~~

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~~of the narrator to participate in the process and overall project, as described in “The Core Principles of the Oral History Association.”~~

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~~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 be used[3] 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.~~

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~~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.~~

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~~口述历史学家应考虑研究目的，并尽可能地寻找具有代表性的，能够呈现多元视角的叙事者样本。寻找叙述者表达观点，应尽可能多样化，确保覆盖面。在与叙述者联系时，访问员应清晰、明确地解释项目目的、解释访问过程并描述访问后续事宜。~~

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~~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.~~

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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 material[7] is made available to the broader public~~

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~~through deposit in an archive, distribution online, and/or any number of other~~
情况下，公众可通过档案、在线资源和（或）其他公众访问渠道获取采访和相关材料[7]。因此，应职业道德要求，叙述者须对采访进行审查和批准。管理审查过程有许多有效途径，因此，口述历史学家应在道德层面遵循以上原则，要预先计划并制定具体环境下行之有效的采访流程。叙述者审阅的范围主要包括：删除访谈内容、限制访问权限和（或）不对外公开部分内容；添加阐释或纠正错误；设定公开日期，或禁止公开。

~~Oral historians should establish a clear procedure[8] (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 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.~~

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Using Oral Sources[9]

—口述资源的使用[9]

~~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.~~

—叙述者核对审核采访后，通常素材将进入储存和公开阶段，口述历史实践的核心也就宣告结束。尽管如此，学者或其他可能使用口述资源（包括口述历史访谈）的人，也应认真学习学科资源和学科道德准则，了解准则并对问题更深入的探讨。口述历史学家在使用口述历史时，要秉持诚实和尊重的原则，不论是使用自己参与的口述资料或其他人的口述资料。在使用口述资料时，要对其进行分析，不论编辑或摘录，都要保证真实地还原叙述者的本意，切忌脱离语境的引用，避免歪曲原始语义。素材的使用者可能从中得出与叙述者不同的观点，但所有结论都应有据可循，并指明来源。

[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.~~我们建议以书面形式完整记录此过程，获得所有参与方的签名并将其保存在项目记录中。但是，我们也意识到出于时间、语言、读写能力和其他因素的限制，此项建议可能无法实行；在这种情况下，我们建议在访谈开始之前要做好记录，包括：项目目标、相关风险，以及叙述者的知情同意。

[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.~~采访后续事宜的方案应在开始联系讲述者之前着手制定。访谈记录的保存和公众访问方案要在项目早期筹划，以保证访谈策划足够透明稳健。

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~~[3] For example: printed publications (monographs, pamphlets, journals), text in museum & web-based exhibits, examples used in pedagogy (both K-12 & higher ed), performances (plays, ballet, opera, monologues), others~~ 例如：印刷出版物（如专著、宣传小册、期刊等）、博物馆或网络展览的介绍词、教学中使用案例（中小学和高等教育）、表演（戏剧，芭蕾舞，歌剧，独白）等。

~~[4] What also sets it apart: The oral historian's unique responsibility and skill in co-creating, co-representing, and co-interpreting.~~ 口述历史的独特之处：口述历史学家在作品创作、呈现和解释方面都要与叙述者共同合作进行，要有相关的责任并掌握相关的技巧。

~~[5] 例如新闻、人类学、民俗学、社会学或语言学的不同访谈方法。 such as interviewing methodologies that are journalistic, anthropological, folkloristic, sociological, or linguistic.~~ 例如新闻、人类学、民俗学、社会学或语言学的不同访谈方法。

~~[7] Transcript, images, artifacts, indexes etc...~~ 转录文本、图片、人为资料、索引等

~~[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.~~ 建议参考美国档案管理员协会的核心价值观声明和道德守则：<https://www2.archivists.org/statements/saa-core-values-statement-and-code-of-ethics>。

~~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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Best Practices

最佳实践

Four key elements of oral history work are Preparation, interviewing, preservation, and access. Oral historians should give careful consideration to each at the start of any oral history project, regardless of whether it is comprised of one or many interviews. This brief document presents the Oral History Association's guidelines for how to conduct a high-quality oral history interview; [1] it highlights some standard practices that should help produce historically valuable and ethically conducted interviews.

—口述历史工作的四个关键环节是访前准备、采访过程、资料保存和访问和使用。口述历史学家在开始任何口述历史项目前，不论项目涉及多少次采访，都应对每一阶段作出认真考量。本文简单概述口述历史协会就如何完成高质量口述历史访谈的指南[1]；文件重点介绍采访实践标准，有助于创造具有历史价值且符合道德规范的采访。

Preparation

访前准备

1. First-time interviewers and others involved in oral history projects should seek training, [2] whether they are conducting individual research or developing a community or an institutional project. 无论是进行个人研究，还是为社区或机构展开项目，初次进行采访的访问员、访员和项目其他人士均应接受培训[2]。

2. During initial Preparation, oral historians should locate an appropriate repository [3] to house the project's finished oral histories and other documentation. Oral historians should take care to select a repository that aligns with the project's goals, has the capacity to preserve the oral histories, can enforce [4] any signed agreements, and will make them accessible to the public.

—在访前准备过程中，口述历史学家应确定合适的存储库[3]，存放项目完成后的口述资料和其他文档。口述历史学家在选择存储库时，要注意满足以下条件：要符合项目目标、有维护口述历史资料的能力、能够落实任何已签署的协议，[4]，并可以让材料公开。

3. Oral historians should outline an oral history process appropriate for their projects and their narrators. They should consult the complete suite of Oral History Association Principles & Best Practices documents for guidance, but whenever possible, the process should include the following: obtaining and documenting the informed consent of the narrator; when possible providing the narrator an opportunity to approve the oral history prior to public release; and sharing expectations about the overall project timeline. At this stage, the oral historian also should develop forms appropriate for documenting the process and related agreements.

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口述历史学家应考虑项目和叙述者特性，制定恰当的实践流程。实践应遵循《口述历史协会通用原则与最佳实践》系列文件指导。实践过程应尽可能包括：获取并记录叙述者的知情同意；在可能的情况下，在公开发布口述素材之前征得叙述者同意；告知叙述者整个项目预期的时间安排。在本阶段，口述历史学家还应该制定合适的表格，用于记录采访过程和相关协议。

4.

~~5. The process of engaging with potential narrators can be relatively simple and brief or involve multiple conversations. [5] The process typically entails two facets: first, describing the project and process and securing the informed consent of the narrator and second, holding a pre-interview discussion to assist in the interviewer's Preparation. These meetings, regardless of their formality, are important in establishing rapport between interviewer and narrator and allowing for clear communication of the following elements:~~

a. 介绍口述历史访谈目的，包括访谈话题、项目研究问题、以及此次访谈的初衷。

~~d. When an understanding on how to proceed is reached, a formal record of that agreement should be completed prior to [6] the beginning of recording.~~ 达成访谈进行模式的共识，并在采访开始记录之前[6]记录该共识。

~~Narrators, find out more about what to expect here.~~

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~~6. In preparing to ask informed questions, interviewers should become familiar with the person, topic, and historical context by doing research in primary and secondary sources, as well as through social engagement with individuals and communities and informal one-on-one interactions.~~ 在确保叙述者知情的基础上, 访问员在准备问题时, 应仔细研究一手和二手资源, 与个体和社区充分交流, 参与一对一非正式互动, 以充分熟悉叙述者、采访话题和历史背景。

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~~7. Interviewers should create, when possible, a high-quality recording of the interview (audio or video format) to capture the narrator's interview accurately with consideration of future audiences and long-term preservation.~~ 访问员应对访问相关资料有长期保存意识, 只要条件允许, 应制作高质量记录 (即选择高清晰音频或视频格式) 精准地录制讲述者的采访, 方便未来人员查阅。

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~~8. Interviewers should prepare an open-ended guide[7] or outline of the themes to be covered and general questions to be asked before conducting the interview. Interviewers should educate themselves about different interviewing strategies with the goal of encouraging the narrator provide the fullest responses to the questions as possible. (See interviewing section below for more details.)~~ 访问员在进行访谈之前, 应准备开放指南[7]或提纲, 列出访谈的主题, 和大致要提的问题。访问员应该掌握不同的采访策略, 目的是尽可能引导叙述者充分回答所提问题。(详情请参见下文采访部分。)

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~~9. Oral historians should recognize that their narrators are not just isolated individuals; they are members of communities, some of whom have historically complex relationships with researchers. When planning an oral history project, interviewers are advised to think about whether they want to engage with those communities in a formal, organized way. Oral historians may decide to develop a plan for community engagement that benefits both the project and the community. These plans for bringing communities into the oral history process might include the creation of a community advisory board, hosting events for sharing research findings, providing oral history training, and more.~~

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口述历史学家不应将叙述者视为孤立的个体; 叙述者本身也属于某群体, 而有些群体可能会与研究人员有着复杂的历史关系。在口述历史项目筹备阶段, 建议访问员考虑是否采取正式且有组织的方式与叙述者所属的社区互动。可选择制定对项目 and 群体双赢的社区参与计划, 使社区参与到口述历史过程中, 包括创建社区咨询委员会、举办研究成果共享活动以及提供口述历史培训等回馈社区的活动。

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Interviewing

访谈采访过程

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~~1. The interview should be conducted, whenever possible, in a quiet location with minimal background noises and possible distractions, unless part of the oral history process includes gathering soundscapes or ambient sounds.~~ 访谈采访应尽可能

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员和叙述者应共同努力，为未来的受众记录具有持久价值的真实信息。

~~5. The interviewer should secure a signed legal release[10]form, ideally when the interview is completed. It is important to follow the guidelines of the partnering repository's policy on this, if relevant.~~

Preservation

资料保存

~~1. Oral historians, sponsoring institutions, and archival repositories should understand that planning for appropriate care and storage of original recordings begins with project conception.~~

口述历史学家、赞助机构和资料储存库都应注意，在项目构思阶段就要着手制定原始录音/录像材料的妥善保管和存储方案。

~~2. Whenever possible and/or practical, oral histories—either individual or many within a project—should be deposited in a repository such as a library or archive that has the capacity to ensure long-term and professionally managed preservation and access. Regardless of where the oral histories ultimately reside the recordings of the interviews should be stored, processed, refreshed, and accessed according to established archival standards designated for the media format used.~~

~~whenever possible, all efforts should be made to preserve electronic files in formats that are cross platform and nonproprietary.~~

~~the obsolescence of all media formats should be assumed and planned for.~~

口述历史资料——不论项目中有多少，只要有可能和（或）切实可行，就应存储在诸如图书馆或档案馆之类的存储库中，该存储库须具有长期专业维护和供公众访问的能力。无论口述历史最终存放在哪里，都应做到：

- a. 采访记录应遵循档案记录标准，以媒体专用格式进行存储、处理、更新和访问；
- b. 尽一切可能采用跨平台非专有格式保存电子文件；
- c. 应该提前考虑到所有媒体格式过时淘汰的风险，并为此作出准备。

~~3. In the interim before deposit, oral historians should~~

~~transfer the original recording from whatever device was used, make an appropriate number of redundant digital copies, [11] and store those in different physical locations, as soon as possible after any interview is completed;~~

~~document their preparation and methods, including the project's context and goals, for their own, the project's, and the repository's files; [12]~~

~~organize and preserve related material for each interview—photographs, documents, or other records such as technical or descriptive metadata—in corresponding interview files.~~

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在存储之前，口述历史学家应当：

- a. 从录音或录像设备上转移原始材料，制作适量的数字副本[11]，并在完成采访后尽快将其存储在不同的实际位置；
- b. 记录下自己的访前准备过程和方法，包括项目的背景、自身目标、项目目标以及存储文档的目标[12]；
- c. 在相应的采访文件中系统化整理并保存每次采访的相关材料（照片、文档或其他记录，例如技术性说明性元数据）。

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Access & Use

In order to enhance accessibility of the audio or audio/video files, an archive should provide, when possible, written documentation such as transcripts, indexes with time tags linking to the recording, detailed descriptions of interview content, or other guides to the contents.

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2. 负责口述历史访谈保存和访问的存储库，无论哪种类型[13]，都应

- honor the stipulations of prior agreements made with the interviewers or sponsoring institutions, to the greatest extent possible, including restrictions on access and methods of distribution;
- b. evaluate documentation, such as consent and/or release forms, and if they do not exist, make a good faith effort to obtain them;

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3. All those who use oral history interviews after they are made accessible should use. 这包括：

- a. 避免对叙述者的刻板印象、错误陈述或篡改叙述者的话语；
- b. 努力保持叙述者观点的完整性；
- c. 意识到访谈的主观性，例如，在可能的情况下应核实叙述者提供的信息；
- d. 依照学术学科的专业标准，结合语境和背景阐释叙述；
- e. 口述历史摘录要结合当时的语境和背景；
- f. 要引用完整口述历史记录的出处。

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[1] Before reviewing this document, please note: Many published and online sources offer further in-depth information about how to conduct an oral history interview. For more on finding the right guide for oral history see: Linda Shopes' list to online web guides and Barb Sommer's [reprinted from The Oral History Manual, 3rd Edition with publisher's permission] bibliography. 在审阅本

文档之前，请知悉：许多公开出版物和在线资源都有更深入的方法，描述如何进行口述历史访谈。详情可参考：琳达·肖佩斯（Linda Shopes）的线上指南和巴伯·索莫（Barb Sommer）《口述历史手册》参考书目（链接文件选自该书第三版，已经出版社许可）

[2] OHA list of centers and collections and OHA list of regional and international organizations. OHA口述历史协会中心和馆藏清单以及OHA口述历史协会区域和国际组织清单

[3] Whether an institutional archive or a personal family archive. See more on-

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~~the glossary term for archive.~~ 不论是机构档案馆还是个人或家庭档案馆。更多有关档案
~~For more on legal issues in oral history, see:~~

~~<http://ohda.matrix.msu.edu/gettingstarted/playlists/legal-issues/>~~ [4] ~~。~~更多关于口
述历史法律的信息，请参见：

~~<http://ohda.matrix.msu.edu/gettingstarted/playlists/legal-issues/>~~

~~[5] Or involve multiple layers of gatekeepers or proxy's before reaching direct
contact with potential narrator.~~ 或在与潜在叙述者直接联系之前，需先与各层人员或代

~~[6] Although many oral historians prefer to request signatures for any legal
release forms assigning rights to the interview after it is completed in order to
better address any sensitive issues that may have come up during the course of
the interview.~~ 许多口述历史学家倾向于在访谈结束后，再和对方签署相关法律授权书，这
样可以更好地解决采访过程中可能出现的敏感问题。

~~[7] Linda Shopes' list to online web guides and Barb Sommer's bibliography.~~ 琳
达·肖佩斯 (Linda Shopes) 的线上指南和巴伯·索莫 (Barb Sommer) 的参考书目。

~~[8] This is with an understanding that in some cases, such as interviews with
vulnerable communities, particularly those with surveillance concerns, there will
be a need to gather only the very basic contextual information.~~ 这是因为在某些情
况下，例如与弱势群体的访谈，特别是涉及到对监控问题比较敏感的群体时，应只收集最基
本的背景信息。

~~[9] In this sense, the "cost" of a project is more than just financial, for
example, good relationship building with the community will involve the "cost"
of the emotional labor involved for the interviewer, project manager, and/or team
members, in creating understanding and trust.~~ 从这个意义上说，一个项目的“成本”
不仅仅是财务上的，还包括例如，访问员、访问员、项目经理和（或）项目成员与社区建立理解
互信关系时投入的“情感成本”。

~~[10] For more on legal issues in oral history,~~

参见：~~<http://ohda.matrix.msu.edu/gettingstarted/playlists/legal-issues>~~

~~[11]~~

~~<http://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/redundancy/>~~

~~[12] <http://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/metadata/>~~

~~[13] <http://ohda.matrix.msu.edu/gettingstarted/glossary/archiveglossary/access/>~~

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For Participants in Oral History Interviews

口述历史访谈的参与者相关信息

~~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.~~

口述历史访谈来自不同领域和专业的人进行。他们可能是学术研究人员、社区组织者、艺术家、纪录片作家等等。他们处理工作并与您沟通的方式可能会大不相同。但是，口述历史学家，不论背景如何，都要遵守以下几项重要的道德准则。我们在这里进行了总结，以帮助您（参与者）就是否参与口述历史项目做出明智的决定。

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:~~

访谈采访前

以下信息应以您能流利使用的语言传达，如果您无法理解语言，可在信任的翻译人员的帮助下了解：

1. The project background 项目背景

~~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.~~

口述历史学家应与您讨论项目和采访的动机，并且告知您他们希望您在该项目中做什么。口述历史学家可能会要求您做出正式声明（录音或书面形式），表示您同意参与该项目并且了解项目流程。请确保您已了解项目的目标，并给与认可。

Contact information 2. 联系信息

~~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.~~

您应收到访问员、访员的联系信息；采访内容储存负责方的信息，可能是档案馆、网站、或其他储存模式的负责人，该方也将负责您资料的公众访问；以及（如果项目有的话）项目总监和（或）道德委员会联系人。

3. The process for participation 参与流程

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~~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:~~

口述历史学家将向您介绍口述历史从开始到结束的全过程。此介绍应包括：

- a. 采访需要多长时间；
- b. 如何记录采访；
- c. 在以任何形式共享采访之前，您是否有机会查看录音、转录文件或其他相关材料；
- d. 与采访经历有关的任何其他细节【原文重复，请和Amy确认】；
- e. 您的权利；
- f. 与采访经历有关的任何其他细节。

~~4. The benefits of participation~~ 参与访谈的利益

~~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. 该项目可能与您的个人兴趣或目标对接；
- b. 您可能获得采访及相关文件，供您使用或共享；
- c. 您所在社区可能获取访问采访所生成记录的特殊权限；
- d. 口述历史项目可能会为您的社区提供其他服务，例如培训工坊或其他活动；
- e. 可能有个人利益或隐形利益，例如有可能作为史料记录在册。

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~~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 采访的预期用途

~~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.~~

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9. 修改或撤消口述历史访谈

~~Altering or Withdrawing Your Oral History Interview 变更或撤消采访~~

~~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.~~

~~采访结束后,您可以就采访或该口述历史项目提出问题和关切。您可以要求该采访不向公众开放,在采访向他人开放之前做出调整,甚至在已经录制口述历史访谈,大部分时候即便已经签署正式协议,也可撤消。若需要进行上述修改,具体模式会根据长期储存的方案和口述历史材料预期用途决定。口述历史学家会毫无保留地跟您分享撤消采访的相关事宜。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.~~

待口述历史材料向公众开放,或存入档案,就不太可能完全撤消。因为口述历史材料一旦公开,就可能被第三方以其它方式引用、使用或参考,而这些行为是口述历史学家不可控的。口述历史学家会尽可能告诉您修改的截止日期,如果过了该日期再修改或撤销就会十分困难,甚至不可能了。

请注意,即使口述历史材料在一段时间不公开,但有些法律方面的问题会使这些限制无效,如法院传票或政府要求记录开放。

~~Formal agreement agreement 10. 正式协议~~ 【这里请和Amy确认,是否是笔误】 [1]

~~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[2]. 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.~~

口述历史访谈结束时,访问员会向您索取书面或口头的声明,正式记录已达成共识的口

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述资料使用方案。此过程也称作“法律授权”。鉴于您作为采访中的叙述者，您对您所说的话拥有所有权，因此在此正式协议签订时，您可授权他人访问或使用此次采访。在此法律授权过程中，您可以给公众作出一揽子的授权，让他们能够随时访问和使用您的口述历史材料，您也可以选择限制材料的用途。请告知与您接洽的口述历史学家您的决定[2]。法律授权书一式多份，您理应得到一份。如果您或访问员不选择签署书面协议，应提前商议。

~~Copyright~~

11. 版权

签署法律授权书时，可能需要您额外向口述历史学家或档案馆授予该采访的版权。也可能会给您将采访授权成为公共财产或签署知识共享许可协议的选项。这些授权是为了他人能在书中、广播、电影或其他媒体上引用您的采访。图书馆和档案馆通常希望拥有版权，以便在现在和未来长期保护该材料。请让访问员为您解释正在签署的文件，如果您愿意，也可以要求其为您介绍其他的公众访问或使用采访资料的方案。请注意，不管您在什么时间签署文件，您都应索取文件的复印件，以备日后之需。理解口述历史访谈有关术语很重要，如有疑问，您可以随时向访问员提出。

[1] 建议将此过程整理成完整的书面文件，取得参与各方的署名并将其保存在项目档案中。若有时间、语言、文化程度或其他条件限制，使之无法实现，建议在采访开始之前，以口头方式向叙述者沟通采访目标和项目风险，并获得叙述者的知情同意，并用录音或录像设备记录下来。

[2] 法律授权协议是最常提到的授权书，此外还有其他形式的授权书。术语表：知情同意、正式协议、使用许可、版权、赠与契据、非专用许可、知识共享、公有领域。

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~~well as other disciplines; cultural objects; and archival objects requiring long-term preservation.~~

~~This guide cannot be a one-size-fits-all resource. Practitioners may need to pick and choose from these best practices based on the needs and resources of their organization or community. Every oral history project should have a plan for archiving its oral histories that aligns with the project's goals and works within the capacity of the project's partners. Practitioners who are not affiliated with a formal archive should consider that capacity may be extended or re-envisioned through resource-sharing with repositories that can offer archival support or guidance. A plan for archiving interviews should take a form that is uniquely customized for the project, weighing the needs, concerns, and strengths of the individuals involved in the project, as well as the narrators.~~

~~Some archiving plans may eschew traditional repositories, particularly when working with vulnerable communities, or when inclusion in a repository carries the potential for legal or personal danger. [1], When considering whether to donate to or work with a repository, it is critical to identify the priorities of the project. Some important questions to ask include: Who will have access to the materials and how will access be provided? How does a project align with the overall mission of potential partner organizations? How will privacy and confidentiality be handled? Plans may also require prioritization of immediate needs and uses of the oral histories over the future life of the materials — for example, in instances where projects emerge from political or environmental crises.~~

鉴于以上情况，制定明确的归档方案非常重要。此文件将为未来理解项目提供背景，包括项目为何进行、如何进行、如何随时间演化以及归档计划如何制订。此文件也可帮助未来的档案管理者 and 使用者理解项目或材料收集的独特之处，保护叙述者或社区的口述材料免受必备文件缺失而导致的误用。

以下文字综述了制订归档方案时至关重要的问题。若要了解更多信息，请移至《档案原则与最佳实践》专题相应的页码。

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Archives Principles and Best Practices

档案存储原则与最佳实践

Appraisal and Accessioning

The arrival of interviews at a repository is one of the most critical junctures in an interview's life cycle. There are two steps in this process: appraisal (the process of determining which interviews should be accepted by a repository) and accessioning (the actions that archivists take to acquire legal and physical custody of the interviews). A clear appraisal and accessioning process allows repositories to handle the intake of oral histories and makes it easier for potential donors or partners to understand how the repository approaches the intake. Responsible accessioning is foundational to good archival practice. It protects materials and collects the necessary information to subsequently create metadata for discovery and provide access consistent with the intentions of the narrator.

(See Manual Appraisal and Accessioning)

评估及登记入册

访谈素材采访的存储阶段是口述历史采访过程中最关键的环节之一。存储过程分为两个步骤：评估（确定哪些采访应该存进储存库中）和登记入册（档案管理员获得采访的法律监管和实物保管权的行为）。清晰的评估和登记过程引导存储库接受口述历史档案，也便于潜在的捐赠者或合作伙伴理解该资料库处理新口述历史材料的方式。认真负责的登记是良好档案实践的基础，这一过程能够保护资料、为之后的元数据建立提供必要的信息，并且按照叙述者的意向提供访问权限。

（见评估和登记手册）

Metadata and Description

Metadata and description include specific fields of collected information which help place oral history interviews in context and enable discovery and access in a variety of ways. Devoting attention to description and metadata at all stages of the process is an essential part of any oral history project. It is important to collect the following types of information or metadata categories: administrative, descriptive, technical, preservation, and rights and access. All stages in the lifecycle of the interview should be considered as opportunities to engage in descriptive practices: pre-interview, interview, processing, preservation, and dissemination. Practitioners should also keep in mind that metadata may need to be monitored over time and changes or updates to metadata may be required after the interview lifecycle. [2]

(See Manual Metadata and Description)

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[1] [4]如：有被驱逐出境风险的无证移民；曾遭受家庭暴力或正在遭受家庭暴力的人；有遭受尾随风险的人。与这些群体访谈时，如果透露住址或行踪，可能会让叙述者受到危险。若想更深入了解资料库保护叙述者的能力范围，请参见波士顿学院贝尔法斯特项目的声明、讨论和相关资源。

[3]关于数字保存概念的更详细讨论，包括系统的可视化，可以参照道格拉斯A·博伊德的《数字抵押：口述历史的数字保存》。该文章出自道格·博伊德 (Doug Boyd)，史蒂夫·科恩 (Steve Cohen)，布拉德·拉克 (Brad Rakerd) 和迪恩·雷伯格 (Dean Rehberger) 主编的《数字时代的口述历史》华盛顿：博物馆和图书馆服务学院，2012年，<http://ohda.matrix.msu.edu/2012/06/the-digital-mortgage/>

[5] A primer on digital preservation can be found

~~Participating in an oral history interview, whether as the interviewer or narrator, involves technical knowledge that crosses several disciplines. Understanding the terminology used by oral historians and related professional fields will be helpful.~~

~~access (see also privacy): Access to a recorded interview can refer to many different formats, including physical or virtual access regulated by requests to an archive or individual responsible for the collection care, or unfettered access to full recorded and transcribed/indexed interview online. It can also refer to the use of recorded interviews in part or full in publication or broadcast.~~

• Access “访问渠道” (同见Privacy “隐私”) (Access) :口述访谈的访问渠道涉及多种形式，有需要向档案馆或负责收藏管理的人提出请求后的实地访问或网上查阅，也有不受限制在线完整访谈录音、索引或转录文本。访问也可以指在出版物或广播中使用部分或全部访谈内容。

• anonymous: While a narrator may choose to have their name disassociated from any interview, or choose to utilize a pseudonym, there can be no guarantees towards absolute anonymity in the oral history process. Information provided to an oral historian is only anonymous if there is no way for anyone, at any time, to determine the narrator's identity from it; that is, there is no identifiable information (see term below). This is a very high standard of information security that oral historians are only rarely able to offer.

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• “档案馆”（另见Repository “存储库”）(Archives): “档案馆”英文原词为 archive, 指: 1. 永久性有价值的记录(例如照片、录音等等)。2. 保存历史记录和文件的机构。3. 保存档案的实体空间【译者注: 在本文中用的最多的意思是“档案馆”的含义】。理想情况下, 口述历史需要对所有类型的档案进行长期维护和妥善保管, 因此最常见的做法是与有良好声誉的档案存储库合作, 该存储库要有足够的经验, 尤其是要管理过口述历史档案这种复杂、敏感又涉及多种媒体格式的材料。更多关于“档案馆”的信息, 可参见美国档案管理者协会网站: <https://www2.archivists.org/aboutarchives>, 更多关于个人档案的收藏(例如家庭录音)可参见如下网站 <http://digitalpreservation.gov/personalarchiving/>。

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• “封闭记录” (Collection Restriction “保管收藏限制” 从属概念) (Close records): 档案馆和存储库用于保存口述历史访谈及相关记录, 通常也负责馆藏档案的访问, 有时需要在特定时间段内, 限制人们对一些档案的查阅或使用。在这种情况下, 封闭的口述历史档案仍将列入存储库馆藏清单, (例如, 通常情况下, 可以通过搜索帮助定位), 但会标记为“禁止访问”, 直到封闭期限结束。请注意, 如果法院需要将相关口述档案作为法庭证据向档案馆发出传票时, 档案馆也必须向法院提供这些封闭的档案。

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~~• community: Group of individuals who share a collective geographic space, experience, or level of ownership of the content being shared.~~

~~confidential: Confidential information is not necessarily anonymous, but it is protected to the best of the oral historian's ability. This means that the information provided during the interview will not be willingly disclosed to others by the oral historian, or any archival repository partner, for an agreed-upon period of time. 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 feel empowered to ask about security measures that may be employed during and after the oral history project. Note that oral historians and archives do not have any special legal privileges or protections to withhold information about criminal activity. In the event of a subpoena they would be obligated to turn over any records or information in their possession.~~

Copyright • “版权” (Copyright): 任何原创作品或独特知识产权所有者都享有使用、传播和从该作品获利的专有权。版权法会因国家或市政当局的不同存在差异。在大多数情况下, 叙述者的口述历史访谈被认作是他们自己的知识产权, 他们是版权的合法拥有者, 或者是共同拥有者。其他人想要使用、传播或从口述历史访谈中获利, 首先需得到叙述者的明确许可、授权或版权。有关版权的更多信息, 请访问美国版权局的官方网站。

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~~• Creative Commons license: These irrevocable licenses are used to define how the narrator, as the copyright holder, would like the general public, rather than a specific party, to be able to make use of their oral history materials. Further information on specific types of Creative Commons licenses is available at creativecommons.org. See more on the case for Creative Commons in oral history work here: <http://ohda.matrix.msu.edu/2012/06/a-creative-commons-solution/>.~~
Creative Commons license “知识共享许可协议” (Creative Commons license):知识共享许可协议规定了叙述者作为版权所有者，希望他们的口述历史材料能够为公众所用（而不是特定的一方），一经许可，不可撤销。更多关于特定类型的知识共享许可协议的资料，请浏览 creativecommons.org。更多关于口述历史作品知识共享的案例请点击：<http://ohda.matrix.msu.edu/2012/06/a-creative-commons-solution/>。

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~~• deed of gift: A deed of gift agreement defines how the narrator would like materials or rights related to an oral history to be managed as a donated collection—that is, transferred to an assigned party, such as the project director or a partnering/sponsoring organization or archive. What makes a deed of gift unique is that the narrator acknowledges granting these rights or materials without reciprocal compensation.~~

Deed of gift “赠与证书契据” (Deed of gift): 赠与证书契据是叙述者将与其口述历史相关的材料或权利赠与受赠人，受赠人表示接受始生效力的协议。即转移给指定的一方，如项目主管或合作/赞助组织或档案馆。赠与证书契据的独特之处在于，叙述者明确赠与这些权利或材料，将不会收到补偿。

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~~diverse voices: Diversity should extend to voices both in the types of people interviewed (age, ethnicity, sexuality, people of color, and so on) and in the variety of possible perspectives within a project.~~

• Diverse voices “多元化声音” (Diverse voices): 项目中叙述者的类型，(不同的年龄、种族、性取向、肤色等)以及可能存在的各种观点应该更加多元化。

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~~formal agreement (release form): Participating in an oral history interview may involve signing specific types of agreements or assigning intellectual property rights. Examples include Creative Commons licenses, deeds of gift, nonexclusive licenses, permission-to-use agreements, and transfer of copyright.~~

• Formal agreement (release form) “正式协议(授权协议书)” 【Formal agreement (release form)】: 参加口述历史访谈可能涉及到签署具体类型或分配知识产权问题的协议。例如，知识共享许可协议、赠与契据、非专有许可协议、使用许可协议和版权转让协议。

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~~• identifiable information: Information that could be used to identify the narrator. The term usually refers to specific details such as name or date of birth. Narrators need to bear in mind that oral history interviews often gather comprehensive narratives about the narrator’s experiences and life story that could be recognized by others.~~

Identifiable information “可识别信息” (Identifiable information): 可识别信息指可以识别出叙述者的信息。此术语通常指叙述者的具体信息, 比如姓名或出生日期等。叙述者需要记住, 口述历史访谈往往会收集叙述者自身的经历和生活故事的全面叙述, 这些叙述使他人能够识别出他们的身份。

• Index (see also time log) “索引(又见time log “时间日志”)” **【Index (see also time log)】**: 为了使口述历史更易于访问, 应该创建一个内容日志(或索引)。类似于一本书的目录, 将一个章节链接到一个页码, 此文档通常将完整记录的小部分摘要链接到一个时间标记上。与逐字转录文本不同, 日志可使当前和未来的用户有效访问口述历史的内容。

• informed consent: An agreement that documents, verbally or in writing, that the narrator has been given all the information necessary to come to a decision about whether to participate in the oral history project. Informed consent does not cover or deal with copyright. The interview process must be transparent, with ongoing participation, consent, engagement, and open discussion among all parties, from the first encounter between interviewer and narrator to the creation of end products. Informed consent plays a key role in ensuring transparency.

• interviewer: OHA's preferred term to describe the person conducting the interview; it should be noted that interviewing is just one part of the oral history process, meaning an interviewer could be, but may not necessarily be an oral historian.

Length • “访谈时长” (Length): 访谈时间应至少持续一个小时, 但也可以根据具体情况将时间调整为一个半到两个小时。口述历史学家在安排访谈行程时, 应给叙述者一个时间框架。本着共享权威的精神, 双方都有权避免让对方的发言超过预定时间。

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~~living human subjects: A term most commonly used in reference to researchers who are guided by an Institutional Review Board (IRB) process. Human subject refers to a living individual who is asked to contribute personal information to a research project; this individual may also be considered a research participant by an investigator or researcher (that is, the interviewer or project director). Human subjects and the data (that is, the stories) collected from them can contribute to a broader study of a topic.~~

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~~• living human subjects “人类受试者” (living human subjects): 这一术语通常用来指由伦理审查委员会规定的研究人员。人体受试者是指向研究项目提供个人信息的在世个人; 该个人也可被调查者或研究人员(即访问员/访员或项目主管)视为研究参与者。人体受试者以及从他们身上收集的数据(即故事)有助于开展对某个话题的广泛研究。~~

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~~metadata: Information about aspects of an oral history interview; it is essential for the curating, discovery, and management of a collection or interview. In an oral history context, Descriptive metadata refers to information about the interview or the topic discussed. Technical metadata refers to the technical information that makes up the digital data file containing the interview, such as file type, codec, file size, and resolution. Administrative metadata refers to information related to issues such as rights management. Structural metadata refers to how individual parts relate to a whole. (For more on this, see Oral History and the Digital Age)~~

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~~Metadata • “元数据” (Metadata): 即口述历史访谈的各方面信息, 这些信息对于访谈的组织、创新和管理都至关重要。在口述历史语境中, 说明性元数据指的是关于访谈或讨论话题的信息。技术性元数据指包含访谈数字数据文件的技术信息, 例如文件类型、编解码器、文件大小和分辨率等。管理元数据是指与权限管理等问题相关的信息。结构元数据指的是单个部分与整体的关系。(想要了解更多, 参见口述历史和数字时代)~~

~~• narrator: A person being interviewed during an oral history recording. While there are many possible terms, including interviewee or chronicler, this iteration of our Core Principles and Practices uses the term narrator exclusively. We do this as an acknowledgment that the people we interview have agency and are not merely “living human subjects.”~~

~~Narrator “叙述者” (Narrator): 在口述历史记录中接受采访的人称为叙述者。也可称为“被采访者”或“编年史家”等术语, 但我们在核心原则和最佳实践术语表中专门使用“叙述者”这个术语, 这样做的目的是为了认可我们采访的人是有主观能动性的, 而不仅仅是“人类受试者”。~~

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~~nonexclusive license: A nonexclusive license can be used by a copyright holder to grant another party rights to make simultaneous use of their intellectual property without transferring their copyright to that party.~~

~~• Nonexclusive license “非专有许可” (Nonexclusive license): 版权持有人可签署非专有许可协议, 授予另一方同时使用其知识产权的权利, 而不必将其版权转让给该方。~~

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~~• permission to use: An agreement that defines specific uses a certain party can make of an oral history. It often includes circumstances and terms of that use, but does not request any transfer of copyrights.~~

~~• privacy: Anyone preserving oral history and making it accessible in any format (that is, unfettered online or in-person access) needs to be aware that data privacy standards have changed in the recent past. Narrators need a precise understanding of what access to their interview will look like, as well as consideration for any third parties discussed within the recording. Access needs to meet local, national, and international data and privacy requirements/standards (see the Oral History Society's page on the effect on oral history of recent changes to EU data protection). Anyone conducting or storing oral history interviews should take all practicable steps to keep the interviews protected from possible illegal or unauthorized uses.~~

~~• Private information “私人信息” (Private information): 有时，叙述者可能无法避免的要与口述历史学家分享一些私人信息，这些私人信息他们不希望被他人记录、使用或获取。访问吴访员需要让叙述者知道他们什么时候开始录音，并在开始录音之前告知他们，得到他们的允许。当叙述者分享私人信息时，应该让访问吴访员知道，并要求他们停止录音。如果叙述者意识到在录音的时候分享了私人信息，他们需要尽快告知访问吴访员。~~

~~• pseudonym: It may sometimes be possible to record an oral history interview with a narrator using a pseudonym. 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. However, this does not mean that the information provided during the interview will be anonymous or confidential (see anonymous and confidential).~~

~~• public domain: Material not protected by intellectual property laws, such as copyright law; such creative work is thus under public ownership and open to use by anyone without permission.~~

~~repository (see also archives): A repository can be either a physical or digital location, depending on the recording format and the project goals; in any case, the term refers to the long-term storage of permanently valuable material. Since oral history does ideally require long-term maintenance and properly managed preservation of all types of records, it is most common to work with a well-established archival repository with a clear track record for managing the media format and the complexities of the sensitive nature of oral history work. Of course, there are instances of oral history projects working exclusively in the online sphere with strong archival principles in place for collection management, as exemplified in such digital archives~~

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~~• research: In reference to the oral historian, interviewer, or project manager, researching a topic or person requires remaining humble and respectful. The interviewer may know a lot about the topic but still not know in the way that the individual/community to whom this history/stories/experiences belong does.~~

Research “研究” (Research): 对某个话题和人的研究，口述历史学家、**访问员/访员**或项目经理需要保持谦逊和尊重。**访问员/访员**可能很熟悉某个话题，但认识角度往往不同于拥有这段历史/故事/经历的特定个人/团体。

~~• restrictions: To enforce specific interviewee/donor requirements such as restriction for period of time before public access to the interview is granted, or online vs. physical access to the interview, the repository needs to have transparent collections management policies and procedures in place. [1]~~

Restrictions “限制” (Restrictions): 为了满足叙述者或捐助者的具体要求，例如限制口述历史访谈前一段时间的公众访问、线上或实地获取访谈，存储库需要具备透明的收集管理政策和程序。

~~• sponsoring institutions: Any organization that maybe affiliated with the oral history project, either by paying for the costs associated with oral history work (labor, travel expenses, and so on), providing archival services for completed project, or providing in-kind support such as relationship building within a community or sharing social capital.~~

Sponsoring institutions “赞助机构” (Sponsoring institutions): 赞助机构指任何可能跟口述历史项目有联系的组织，可能是与口述历史工作成本(劳动力、差旅费等)支付相关的组织，也可能是通过为已完成的项目提供存档服务，或者是提供非现金支持的组织，例如建立关系的社区或共享社会资本的组织。

~~terms: Specifically in regard to terms of agreement for the use of an oral history interview, these terms might include restrictions on public access for a period of time or on access by location.~~

Terms “术语” (Terms): 特指同意使用口述历史访谈资料的术语，这些术语内容可能包括限制一段时间内的公众获取或是对通过定位获取资源方式的限制。

~~• time log (see also index): To help make an oral history more accessible, one should create a log (or index) of its contents. Akin to a book's table of contents, which links a chapter to a page number, this document usually links a summary of a small section of the full recording to a timestamp where that summary starts. Different than a word-for-word transcript, the log can serve as an efficient and effective way to unlock the oral history's contents for current and future users.~~

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Time log “时间日志” (参见 index “索引”) (Time log): 为了使口述历史更易于获取, 应该创建一个内容日志 (或索引)。类似于一本书的目录, 将一个章节链接到一个页码, 此文档通常将完整记录的小部分摘要链接到一个时间标志, 摘要从那里开始。与逐字记录不同, 日志可作为一种有效的方式, 为当前和未来的用户快速获取口述历史的资源。

• transfer of copyright: Many agreements or contracts that narrators are asked to sign may include a transfer of their full copyrights in the oral history to another party. (see copyright)

• Vulnerable communities “弱势群体” (Vulnerable communities): 了解口述历史访谈中涉及的权力动态对于这一领域的道德工作至关重要。在与弱势群体打交道时, 这一点尤其重要, 弱势群体包括但不限于以下群体: 因公开分享其经历而处于危险或面临伤害的人; 法定未成年人; 权利和自由都受限的人以及知情同意能力受损的人。符合这些说明的群体可能包括那些经历过创伤的人, 以及那些关注诸如移民等活动的人, 因为这些活动本质上可能违反州法或联邦法律。

[1] For an overview of the most prominent case depicting the fallout from managing oral history collections with restrictions, see “Secrets from Belfast,” Chronicle of Higher

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