

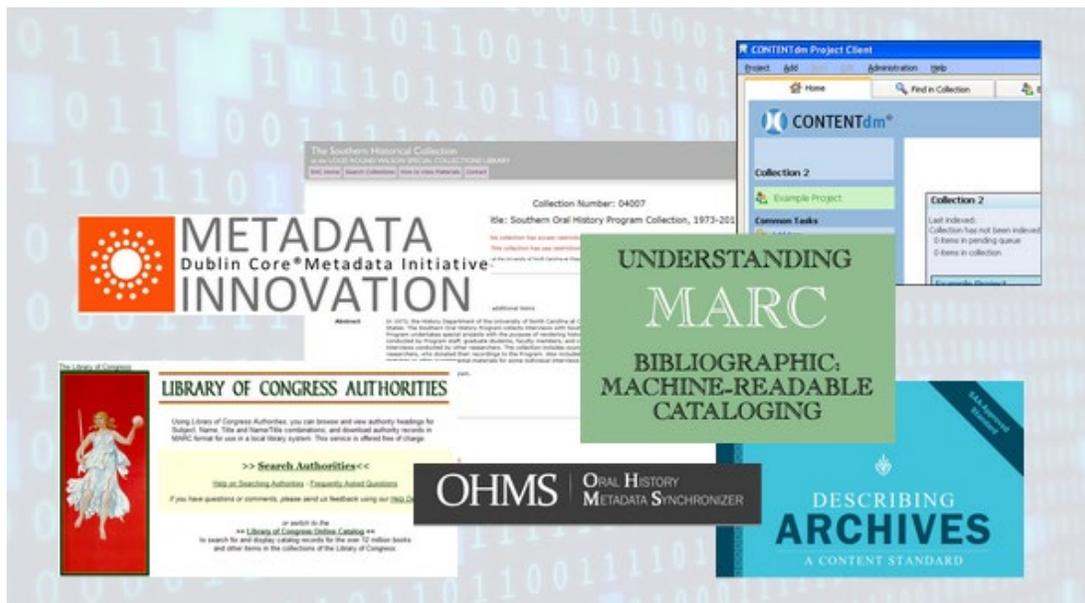
# Oral History Metadata and Description: A Survey of Practices

Survey Report

December 2020

Prepared by the Oral History Association Metadata Task Force:

Lauren Kata  
Natalie Milbrodt  
Steven Sielaff  
Jaycie Vos



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# An Invitation to Readers

*This document is approximately a 30 minute read.*

Before we begin, we'd like to offer some ideas about how this document may serve you. Whether you are brand new to metadata or a seasoned expert, we welcome you to read this report and consider our findings and ruminations on oral history description and metadata practices.

## **For the “Metadata Familiar:” *What might this report offer you?***

- Insight into the particular decisions that existing programs/practitioners are making, with theoretical ruminations on what is working, and what could improve.
- A reference to turn to. With few examples of published data on oral history archival practice across the community, at a detailed level, we consider this a contribution to existing literature on how archivists and others describe oral history.
- What should you pay particular attention to?
  - *Why is oral history complicated to describe?*
  - *The tools and standards colleagues are using to describe oral history*
  - *When is oral history described? (the life cycle approach)*
  - *Pain points experienced throughout the process*
  - *What does “accessibility” mean?*

## **For those new to metadata: *How can this report help you?***

- It provides a snapshot of what practitioners are using to archive oral histories to help you make decisions about how you will catalog and describe (or affirm what you're already doing).
- It provides different perspectives on what access means, and how it may be achieved for oral history interviews / collections.
- It is a great reminder that everyone should be thoughtful about the special nature of oral history, and includes oral history-specific information for your recordkeeping, whether that is public-facing or internal.

## **For all readers:**

- This report shows that there isn't one system or tool being used across the board for oral history description, and that perhaps there need not be. Survey responses showed us that rather than an overarching standard that mandates how all oral history description should take place, depending on the institution and project, practitioners are currently mixing and matching various schemas, tools, and systems that meet their needs.

## Summary

From December 2016 through February 2019, fifty-eight oral history practitioners who self-identified as collections managers, archivists, librarians, oral historians, catalogers, community project managers, journalists, moving image archivists, and media specialists participated in a survey conducted by the Oral History Association Metadata Task Force (MTF). The purpose of the survey was to learn more about how oral history practitioners describe their collections to enable discovery and accessibility for the wider public. Understanding that landscape view has been a critical foundational step for the MTF in the development of 21st-century guidelines and tools for the thoughtful and useful selection and creation of oral history metadata.

These survey results not only provide information on current practices across institution and collection types throughout the US, they also suggest the need for a broad, nuanced, and inclusive approach to oral history description as a way to ensure access to both the *content* and the *context* of oral history interviews and collections. They also account for the growing number of practitioners who are embracing oral history as a medium, who are creating collections and are subsequently building “an archive,” whether that means depositing materials to a repository or following a post-custodial model.

The biggest takeaway of our survey is no surprise to those working with oral history: there is no “one size fits all” solution for metadata capture and creation. Communities of practice need an approach that balances the special nature of oral history with their local missions, goals, and resources, and one that acknowledges oral history interviews may be only a fraction of an overall repository’s or organization’s collection. But sharing this broad takeaway isn’t a cop out! Based on these survey results and other community feedback, the MTF has prepared two major resources that we believe will be useful to those working with oral history: (1) a comprehensive and life cycle-centered list of recommended oral history-specific elements and guidelines for use in workflows, and (2) an oral history “practitioner profile” template that will allow for efficient metadata planning, not only based on institution but also by project. More information about those tangible tools is available at the end of this report. In this report’s conclusion, we discuss more about how the MTF has adopted the design concept of “user personas” to help practitioners document their own profiles and make decisions about oral history metadata.

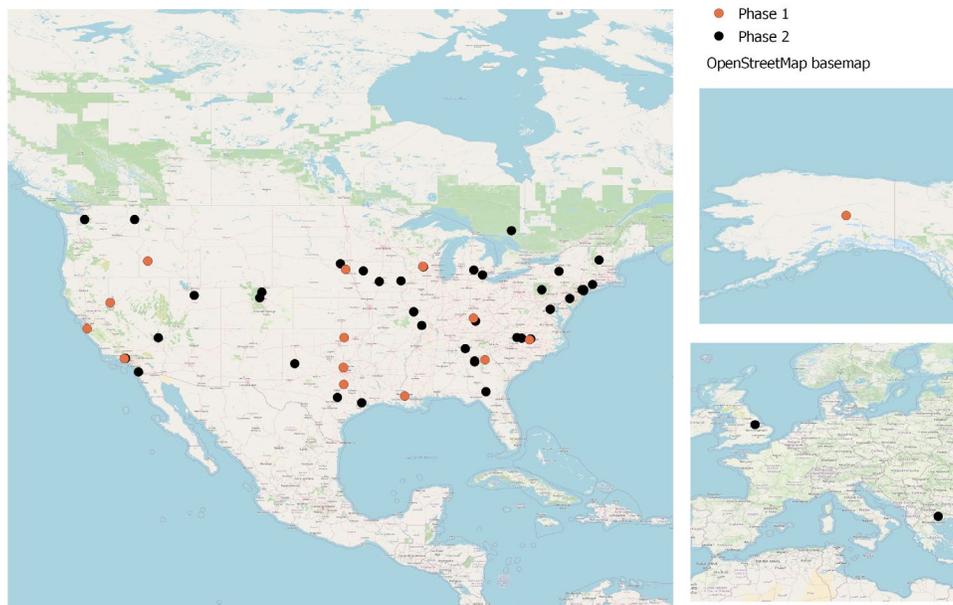
The primary purpose of this published report is to share the results of our survey. The information our colleagues provided has been incredibly insightful, validating common challenges and pain points, and affirming our assumption that variation in understanding and practice depends on participants’ “personas.” The scenario which one finds themselves creating, curating, or disseminating oral history will largely shape the metadata decisions made for each interview and each collection that one must describe and make accessible.



## Breakdown of our methodology and who participated

This report describes a roughly two-year exercise of data gathering about oral history descriptive practices. Our group had three main survey objectives: (1) to make current practices more transparent; (2) to use the information to test our assumptions about oral history metadata and archives; (3) to provide a benchmark for practitioners to assess their own practices. From December 2016 through February 2019, the MTF collected information about descriptive practice in two separate surveys: “Phase One” and “Phase Two.” A total of fifty-eight

### OHA Metadata Practices Survey Respondents



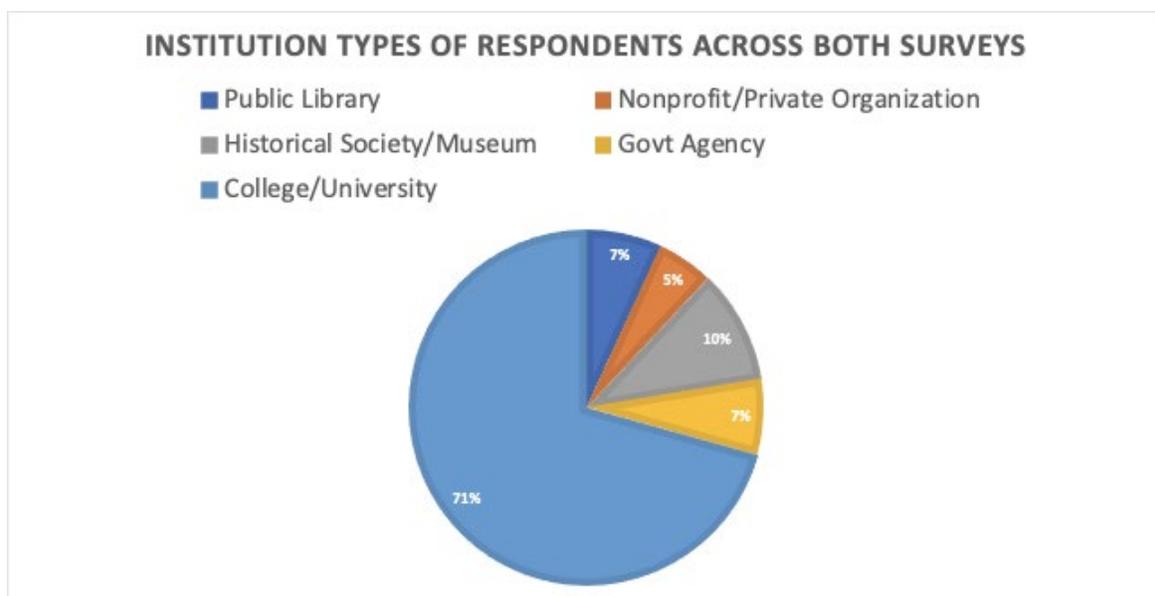
respondents, primarily from the United States, and primarily (but not exclusively) representing college and university programs, participated in the survey across both phases.

## Phase One Survey

[Phase One](#), conducted between December 2016 and May 2017, specifically targeted practitioners in established oral history programs at academic institutions in the United States. We recognized the importance of understanding the descriptive practices inside well-established oral history programs, i.e. programs which had some sort of dedicated, articulated institutional support for preserving and making oral history accessible. We identified and reached out via phone and email to representatives of twenty-two such programs; fourteen of those program representatives responded and participated in the survey. The survey itself was a Google form containing a variety of qualitative and quantitative questions. Results were analyzed and the MTF presented the data at the 2017 annual Oral History Association meeting. A copy of the Phase One survey can be found [here](#), and the full set of survey questions is also included in this report's appendix.

## Phase Two Survey

The MTF designed [Phase Two](#) of the survey with the intent of opening it up to a much broader pool of participants. We added several questions and made alterations to some questions from Phase One to better articulate the information we sought and to gather additional information. Significantly, in Phase Two we added five additional questions that invited respondents to tell us "what metadata do you create/capture?" for each life cycle stage. The MTF sought participants for Phase Two through a variety of means, such as emails to listservs, targeted emails to practitioners, social media posts through OHA and other organizations, and announcements with sign-up sheets at multiple professional conferences. A total of forty-four practitioners across a variety of institution types completed the Phase Two survey. Most respondents were located in the US -- a few practitioners representing institutions outside the US (Canada, UK, Europe) answered the call and shared their experiences. A copy of the Phase Two survey, which was conducted between February 2018 and February 2019, can be found [here](#), and the full set of survey questions is also included in this report's appendix.



## Mixed Method Approach

In order to make the most of this environmental scan, we decided on a mixed-method approach for both surveys. We combined demographic questions with multiple choice and open-ended response questions, gathering qualitative and quantitative data. We made the particular choice to utilize open-ended questions because we aimed to gain insight into practitioners' decisions, practices, and reflections, and to understand practitioners' interpretations of important concepts (such as access) in their own words. Most of the survey questions were required, while we left a few open-ended questions optional. At the end of each survey we also asked respondents if we could publish their results as part of our report and any other work products. Because a number of respondents asked to remain anonymous and did not give us permission to share their particular answers, we have not included the raw data and survey responses as part of this report. In the appendix, we do provide a list of all questions asked in both surveys, as well as a sampling of anonymous respondent quotes.

## Main Takeaways

### Not surprisingly, practice varied among participants

While we did identify some commonalities across practice, there were no clearly prominent methods or approaches to describing and providing access to oral histories. From participants' responses, we learned:

- Practitioners use a variety of metadata schema and standards, content management systems, and access points throughout the oral history life cycle
- Participants generally demonstrate a sense of value for oral history and a strong belief that accessibility to oral history is important
- Perspectives about what accessibility means vary
- While most respondents indicated using some sort of descriptive standard, oral history is described following different approaches and at different levels, as well as at different stages of the oral history life cycle

A next step in analyzing these results may be to dig deeper to be able to ascertain why so much variety exists through understanding correlations between institution type, collection size, staff size, available resources, and primary audience.

### Metadata for oral history is important

In response to the question "What role does metadata play in making interviews accessible?" respondents indicated a belief that metadata is important at all levels throughout the oral history life cycle, from detailed (e.g. technical metadata about digital objects) to big picture (facilitating discoverability and patron use). Interpreting the survey responses, the top roles of metadata include:

- Providing context
- Improving discovery and accessibility

- Supporting internal workflows and processes
- Establishing consistency between systems (interoperability)

## Oral history is complicated because...

Answers to survey questions such as “Why is oral history ‘special’?” and “How’s it going for you?” suggest to us that those who work with oral history collections first-hand know that it is particularly complex. Most answers revealed that oral history is complicated because of a combination of reasons related to format, context, resources for delivery/access, legal and ethical considerations, and the iterative nature of processing the multiple and various versions of the content. According to respondents, oral history is complicated because of:

- Shared authority with interviewees, which results in their hands-on involvement during post-production and processing
- Complicated workflows which require a variety of skills and specialized knowledge to attend to an overall interview collection (e.g. archival skills and technical skills)
- Time and labor required to provide access, particularly when item-level access points are often deemed necessary
- Rights management issues being more complicated than other collection/record types, especially for legacy collections
- Lack of clear cataloging or description standards preferred for oral histories

Even while acknowledging the challenges of the complex nature of oral history, most respondents also shared reasons why they feel oral history is special and valuable. As one participant wrote:

“The sheer amount of time required to collect, preserve, and make oral histories accessible is what makes it incredibly difficult for me as the only staff member at my institution formally charged with doing so. Ethical and legal considerations make oral history intimidating to me. Knowing that we are preserving unique and compelling stories is what makes it worthwhile...”

## Different metadata types are applied at different stages of the life cycle

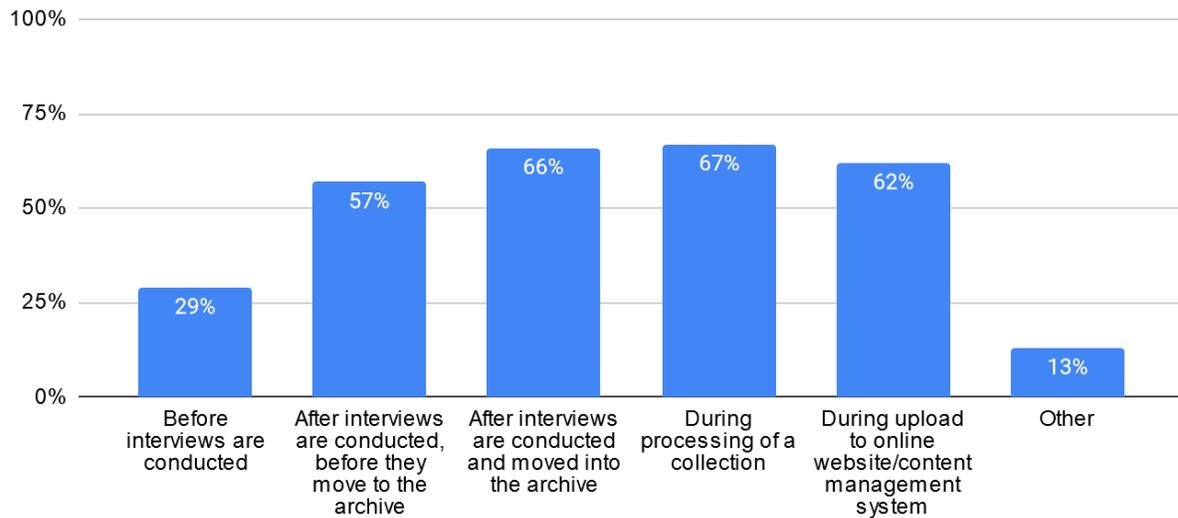
In each phase of the survey, we asked participants how they described oral histories and at which stage in the oral history life cycle they captured metadata. Life cycle stages were listed in the survey as:

- Before interviews are conducted
- After interviews are conducted, but before they move to the archive
- During processing of a collection
- After interviews are conducted and moved into the archive
- During upload to online website/content management system

Though they do not match one-to-one, these stages roughly align with the life cycles as defined in the Oral History Association's [Archiving Oral History: Manual of Best Practices](#), which was published after the completion of these surveys in October 2019:

- Pre-interview
- Interview
- Processing
- Preservation
- Dissemination

Results across both surveys to the question, "In your institution's workflow, when do oral histories get described? Check all that apply."



In Phase Two, we added for each life cycle stage the question "What metadata do you create / capture." This was information we wish that we had asked respondents in Phase One.

These questions were open-ended, and we purposefully did not specify elements for survey participants to choose from in order to qualitatively gauge what terms practitioners collect and capture. Presenting this question in alignment with the oral history life cycle also reflected an acknowledgement that description need not "begin" after transfer to a cataloging or archival repository or when a collection is being processed, but rather that there are opportunities to capture metadata and describe oral histories at each stage.

Answers varied greatly as respondents indicated that they capture information about both the contents of the interview itself (such as topics discussed) and the context of the interview (such as when and why an interview was conducted), in addition to technical and preservation metadata.

The responses suggest that different practitioners have different foci both at specific stages and in the ways they describe oral histories overall. Additionally, answers varied greatly in volume, as some respondents detailed an extensive list of elements at each stage while others provided only a handful at one or two stages. All metadata elements shared by survey respondents were analyzed in detail for possible inclusion into the comprehensive list of oral history-specific metadata elements the MTF developed (more about this list is in the “Putting Results Into Action” section below).

Amidst the variation, two main trends emerged from the collective responses about what types of metadata are created/captured:

- Description happens most often **after the interviews** have been conducted and moved into the archive/repository
- Description flows in a way that **does reflect the life cycle stage**, from biographical and logistical (e.g. name of interviewee and date of interview) metadata, to context and content of the interview itself (e.g. subjects discussed, recording conditions, and circumstances), to technical and preservation metadata (e.g. preservation copy format and digital storage size)

It should be noted again, though, that the respondents indicated capturing and collecting a wide array of metadata elements throughout the life cycle and this flow is a simplified summary. Beyond that, to understand more in-depth correlations would require taking a closer look at the elements discussed and by whom. For example, for those who capture metadata during the pre-interview stage, taking a closer look at their institution type, as well as information provided about their program’s resources, might provide some greater insights. Overall, results show that metadata is captured the least during the pre-interview and interview stages, which in our experience is when important information about the context of the interview could and should be captured. This takeaway is also related to challenges expressed about legacy collections. Interviews may sit for undetermined amounts of time between recording and processing; without metadata applied early, important contextual information could be lost.

## Understanding and interpretation of “accessibility” varied

Participants across both surveys offered different responses about what accessibility means. There was a general trend in expecting access to be online and digital. For some participants accessibility meant simply providing information that oral history interviews exist; for others, accessibility meant direct access to recordings or transcripts. Some respondents shared that to be accessible, oral histories need to be available in a fully digital, online capacity, while some noted that in-person (in a reading room, for example) is a form of access. In other responses, there was a focus on the concept of usability/ease of use without as much emphasis on the location. Access points discussed spanned locations and spaces such as library and archives websites, social media, reading rooms, digital content management systems, and podcasts. Some respondents also raised the idea of “active” accessibility, such as collaborating with faculty or students to conduct their own interviews.

Here are six examples of responses in answer to the question “What does ‘accessible’ mean to you?”:

- “We make our interviews accessible by...promoting them through our social media accounts.”
- “To me, accessible means that any member of the public can find a record of the interview and can understand how they might be able to find additional materials - transcripts, indexes, recordings - that may exist.”
- “Currently only a handful of interviews are fully catalogued and playable on our new digital CollectiveAccess site...The plan is to eventually get all of these interviews publicly accessible/playable on our CollectiveAccess site. The way we plan to make the interviews accessible is to post them publicly on the site, along with a brief description of the interview and a short biography on the interviewee.”
- “We do not plan to put all our files/disks up but make them available through finding aids.”
- “That the archives has the practical means or legal authority to facilitate a patron viewing or listening to an interview...That is to say, a patron could view or listen to an interview in some format in the reading room OR as a reproduction OR on the web.”
- “Accessible means that researchers and others can read and/or listen to the interviews directly (without having to seek special permissions or physically coming to the library). At [institution], this means online so that individuals worldwide can access the interviews. Description (and good metadata) are key, to me, in creating and sustaining accessibility.”

## Discoverability approaches also vary across institutions

On the topic of discoverability (i.e., how users might discover that oral histories exist in the participants’ repositories) our open-ended questions led to answers that were diverse and varied, and included references to catalogs (e.g. library OPAC, WorldCat), online databases or other Content Management Systems (e.g. CONTENTdm), project or program websites, and finding aids (published and internal). But participants also indicated that discoverability means that collections and interviews may be found from searching the open web (i.e., Google), through marketing using social media and other promotional information, and/or through citation mining and person-to-person outreach efforts, including primary source instruction.

Many respondents emphasized online and digital discoverability platforms and options. Some respondents indicated using only one or two platforms to aid in user discovery, such as a library catalog, while other respondents indicated using a combination of platforms. For example, this respondent’s answer illustrates a mixed approach for discoverability:

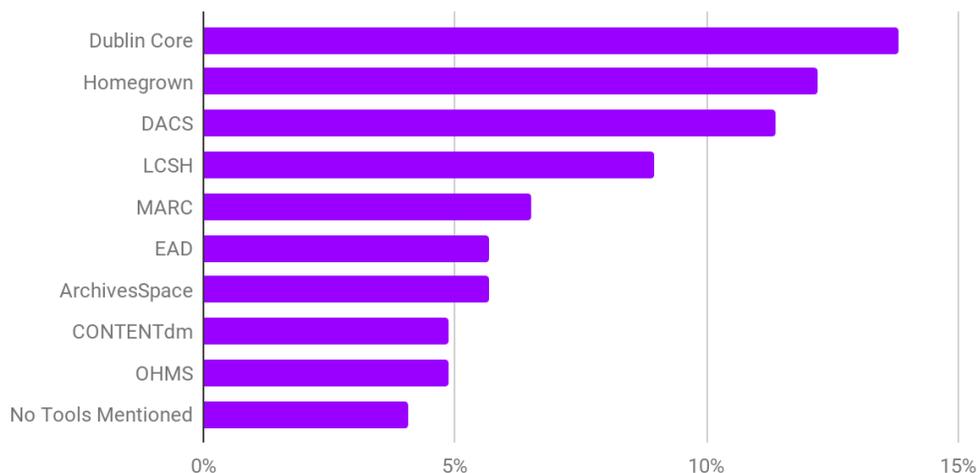
“Our ArchivesSpace site serves as a central location for users to browse our collections and items that are located in the archive, which includes our oral history collection. This site links directly to our digital collections site where interviews are posted online, for quick and easy access. This site will be advertised on the archive’s webpage. As well, the collection will be directly advertised on the archive webpage as part of our featured digital collections. We also advertise our collections, including the oral histories, on social media and at Homecoming.”

## Many different tools are used to describe oral history collections

In both surveys we asked an open-ended question about which tools and/or standards respondents used to describe oral histories. We did not provide definitions of metadata standards or tools, and as such, the respondents answered in a variety of ways and mentioned metadata standards, schemas, content management systems, and other guides. Here are some key takeaways from this question:

- The most commonly reported metadata tools utilized throughout the life cycle were CONTENTdm, OHMS, and ArchivesSpace
- For description standards and metadata schemas, participants most commonly indicated using Dublin Core, DACS, MARC, LCSH, MODS, and EAD
- Mentioned at least once were RAD, PBCore, VRA Core, RDA, TGM, XML, OpenText Media Management, Ethnologue, DPLA standards for controlled vocabularies, and the Oral History Cataloging Manual
- At least one respondent indicated using Adlib, Past Perfect, Archon, Drupal, DSpace, CollectiveAccess, and Omeka

Most Mentioned Tools and Standards Used to Describe Oral History  
(Both Surveys Combined)

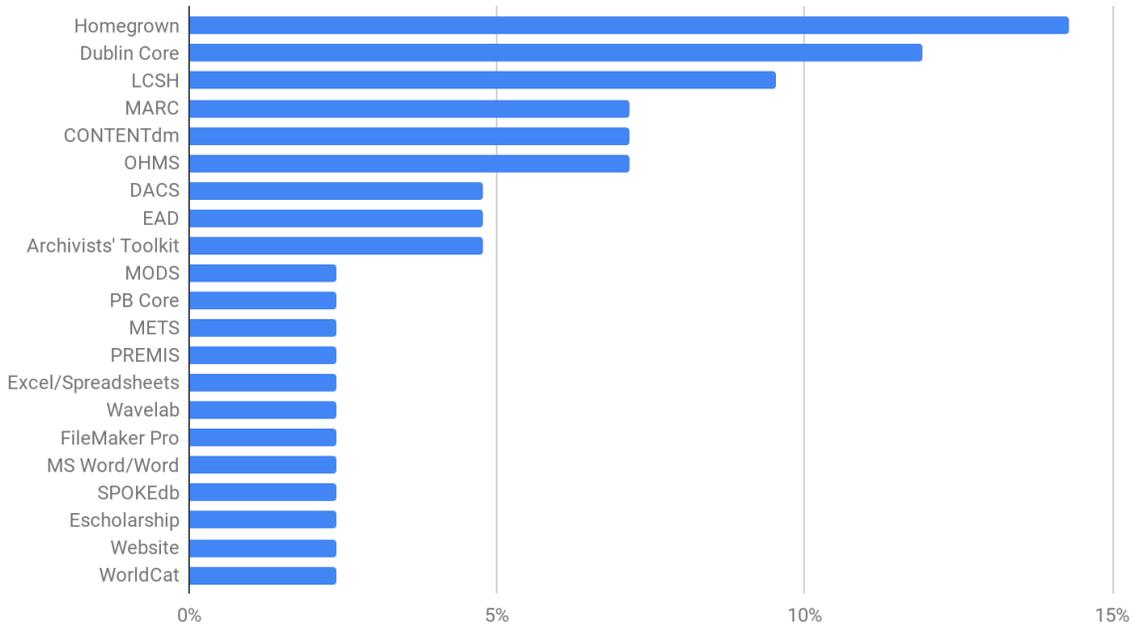


Practitioners often reported that they use a combination of tools and standards, with variation across the oral history life cycle. For example, one respondent gave a detailed overview of descriptive workflows:

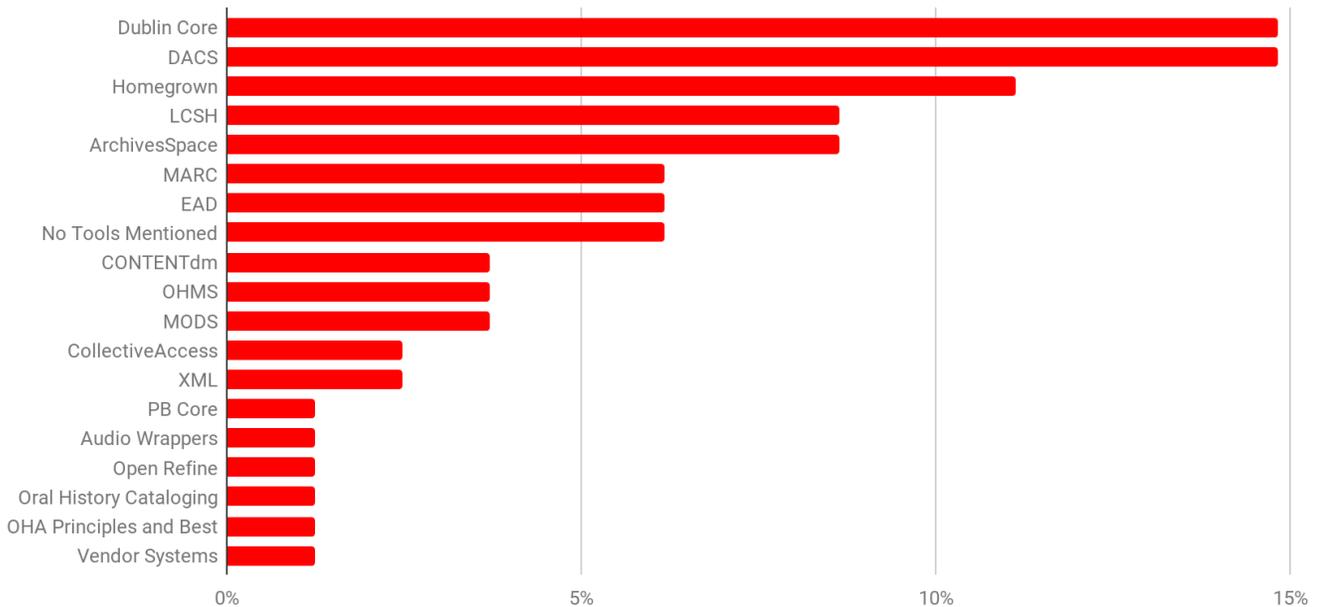
“Interviews are assigned metadata in CONTENTdm. Some fields are mapped to Dublin Core and many are locally-implemented, with both local controlled vocabs and widely recognized like LCSH. This includes a range of descriptive, technical, and admin metadata. (EAD) finding aids adhere to DACS. At the point of ingest into the digital repository, the archives staff makes a METS file (with MODS), and there is a PREMIS

record as well. CONTENTdm and the finding aid are the public access / discoverability tools, and the repository is library-only.”

### Phase One (2016-2017): Most Mentioned Tools and Standards



### Phase Two (2018-2019): Most Mentioned Tools and Standards



## Pain points

Understanding respondents' reported pain points around preserving and providing access to oral history collections comes from looking at respondents' narrative answers to several questions from our survey, including "What makes oral history special?," "How are things working for you?," and the question "Is your program fully capturing everything that's important to know about oral history?" While many respondents self-assessed their operations as average or above, some indicated that more could be done. For example, a common pain point reported was the complexity of managing oral histories and the expertise required to do so well. Managing legacy interviews or collections was also mentioned.

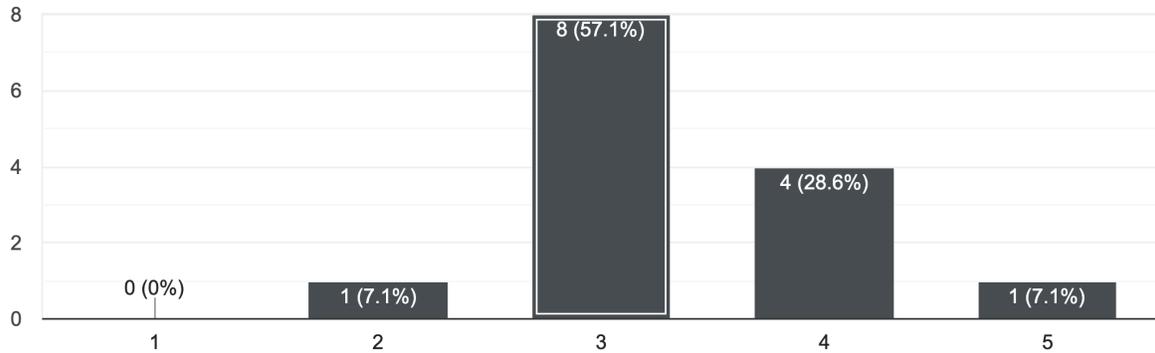
Here are some of our interpreted top pain points reported about managing oral history:

- Oral history's multidimensional/multiformat nature (for example, it could be a recording that has multiple derivatives and will have multiple edited versions, a transcript, an audio output - multiple "things" that are all the "oral history")
- Amount of storage required for oral history collections, especially video, and the IT expertise required to manage and maintain
- Requirements to implement a platform or system for disseminating and sharing
- Ethical and legal considerations involved with maintaining interview description over time, including rights management restrictions that may change
- Keeping up with the deterioration of analog media formats
- Dealing with legacy collections that lack any metadata, the extra time needed to create description and sometimes specialized equipment is needed to create metadata
- Lack of staff resources: for example, not enough staff members to implement full workflows, or, staff not having specific tools needed to do their work
- Vulnerability in transfer from the "creators" (interviewers/project managers) to the "curators" (library/archives/museum repository)

## Results from Phase One, where 1 meant "really not well" and 5 meant "fantastic!"

Think about your system for making interviews discoverable, available, understandable, and usable. How are things working for you?

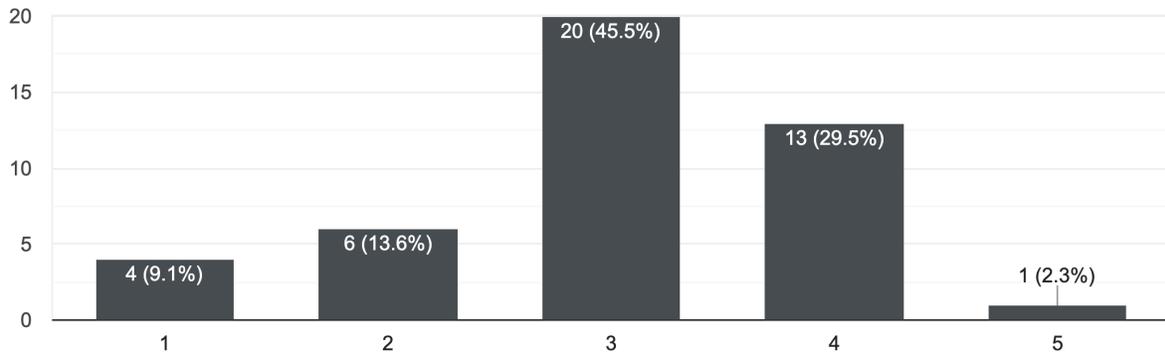
14 responses



## Results from Phase Two, where 1 meant "really not well" and 5 meant "fantastic!"

Think about your system for making interviews discoverable, available, understandable, and usable. How are things working for you?

44 responses



## Putting Survey Results into Action

The variation across responses helped our group decide to pursue an approach to defining oral history descriptive standards that favors "[Not Another Schema](#)," but rather the development of guidelines and an online tool that will help practitioners decide for themselves what might work best for them. To that end, in 2020 the MTF put these results to action in the following ways:

- Prepared and analyzed Phase One and Phase Two survey results
- Completed an annotated Comprehensive Set of Oral History Metadata Elements
  - This “schema-agnostic” elements set, or list, is intentionally massive and is intended to contain as many pieces of information a given practitioner may want to collect, capture, or share about oral history as possible. It does not function to be a prescriptive schema, but rather presents practitioners with myriad elements that they can then consider and select for their own purposes. This comprehensive elements list is organized according to the oral history life cycle stages, and in addition to the elements themselves, it contains an accompanying data dictionary which includes explanatory notes and examples.
  - From its beginning, the list is crowdsourced in nature. It originated from a series of brainstorming workshops at regional oral history conferences across the US. From these beginnings, we normalized, refined, and de-duplicated the elements. Additionally, we updated this list multiple times based on survey responses, feedback we received from our presentation at the OHA 2018 conference, and other feedback from practitioners. This list will likely continue to evolve as oral history descriptive practice evolves.
- Developed a “Build Your Own Persona” approach to help practitioners make decisions about oral history description and metadata
  - The practice of using personas comes from user experience design and is intended to provide insight to a variety of user perspectives, wants, and needs. Personas typically serve as an empathy boost for designers who need to produce goods and services that work well for a variety of users who might be very different from themselves.  
 To adapt this practice to the work of oral history metadata and description, we created a way for practitioners to leverage their deep understanding of their own collections, researchers, and organizations to become their organizations’ own user experience designers. We developed a template of questions intended to draw out a practitioner’s understanding of the goals, requirements, constraints, and functions of their oral history projects and/or institutions. Then, based on their answers, users can make informed decisions about which metadata elements they might use in a given project from the comprehensive elements list. The idea is that there are many different types of oral history projects and practitioners, and no one size fits all.  
 By building a repository of different personas, practitioners may browse the options and learn from one another, in order to make decisions based on what they have observed about practices by similar institutions. This exercise of thinking deeply about our organizations and projects as personas can also bring to light additional information that would be helpful to add to the metadata currently captured and preserved.
- Tested the tools among ourselves and with a small focus group
  - We began building out the repository of personas with each of us creating a persona for our own practices and institutions. Then, we piloted our persona template with invited archival colleagues, who used their own answers to our

persona questionnaire as a guide to select metadata elements from a sample of the comprehensive list. We hope this repository will grow to include more personas that offer additional decision-making models and guidance.

- Began a development collaboration with METRO (Metropolitan New York Library Council) to pilot an oral history metadata module of the open source digital collections software Archipelago that will:
  - Utilize the elements list and provide practitioners with a dynamic interface to select their own sub-set of metadata elements that best match their collections and priorities
  - Invite users to build their own personas and add them directly to the system's persona gallery, contributing to an open-source collection of practitioner personas that others may browse
  - Eventually, develop suggested mappings for these schema-agnostic elements to existing standard schemas such as Dublin Core, EAD, and VRA Core

The partnership with METRO is an exciting way that the team is closing out one part of its work to move into the next. While the elements list, persona building tool, and personas repository began as publicly available resources online via our MTF Google Drive, our partnership with METRO has led to these resources being available directly on our repository within [Archipelago](#).

With these above actions in motion, our hope is that this survey of oral history metadata practices provides both an environmental scan as well as a place from which practitioners can grow their understanding and further refine the skills and knowledge we believe are important for managing oral history collections.

## Conclusion

Publishing and promoting these results are important actions that we hope will help the oral history community of practice understand the greater landscape of description, as well as help programs assess how typical their approaches are. We also hope that these survey results help demonstrate the shared responsibility of creating and preserving metadata across teams responsible for ushering oral histories through each life cycle phase. Metadata is not just something the "technical staff" does once the interviewing is over. It is best when metadata creation is part of the work product at every phase, because descriptive metadata is key not only for discoverability and accessibility, but also for understanding, sense-making, and evaluation of oral history as a specialized type of primary source.

# Oral History Association Metadata Task Force

## Membership

<a href="#">Lauren Kata</a>	Academic Librarian and Certified Archivist, New York University Abu Dhabi
<a href="#">Natalie Milbrodt</a>	Metadata Services Coordinator, Director of Queens Memory Project, Queens Public Library
<a href="#">Steven Sielaff</a>	Senior Editor and Collections Manager, Baylor University Institute for Oral History
<a href="#">Jaycie Vos</a>	Special Collections Coordinator and University Archivist, University of Northern Iowa
Sarah Milligan	Head, Oklahoma Oral History Research Program, Oklahoma State University (OHA Council Liaison, 2020)

Other former OHA member partners: Cyns Nelson (founding member), Doug Boyd (initial OHA Council liaison), Nancy MacKay (member emeritus)

For more information on the Task Force: <https://www.oralhistory.org/the-oha-metadata-task-force-mtf/>

## Acknowledgements

We would like to thank the many individuals and organizations who supported and contributed to this endeavor. Many thanks to the survey participants for providing thoughtful, thorough answers. Thank you to everyone who participated in our various conference presentations at SAA and OHA, and to the OHA Archives Interest Group dedicating meeting time for soliciting feedback. A special thank you to Nancy MacKay for offering guidance and insight throughout this process, from survey design through analysis and everywhere in between, and to former Metadata Task Force member Cyns Nelson whose tenure on the Task Force concluded with development of the Phase One survey. Thank you to our past and present OHA Council liaisons, Doug Boyd and Sarah Milligan, and to OHA leadership for supporting our work and providing encouragement over the years. Finally, we are grateful to the Baylor University Institute for Oral History for their initial co-sponsorship of the 2016 two-day workshop that kicked off the notion of creating a survey to understand the landscape of oral history descriptive practice.

### *Reviewer Acknowledgements*

We'd also like to express appreciation to these colleagues for providing feedback on this report:

Nancy MacKay	Kristine McCusker
Sarah Milligan	Cyns Nelson
David Olson	Jennifer Snyder
Weatherly Stephan	

# Appendices

## Appendix A: Full List of Survey Questions

### **OHA Metadata Case Studies Survey Questions**

Here is a presentation of the questions asked in each survey. Mentioned above in our report, we adopted a mixed methods approach by asking both quantitative and qualitative questions. Readers will note that the surveys are not identical; in Phase Two, some of the questions were worded differently (Qs 5, 6, and 11) and Phase Two also includes the added question “What role does metadata play in making your interviews accessible?” (Q12), and the addition of a section where we asked respondents to describe what types of metadata they create during five different oral history life cycle phases (Q16 - Q20). As explained in our report, we are not providing the raw responses to protect the anonymity of our respondents as well as to honor those respondents who indicated that we do not have permission to publish their answers.

### **Phase 1 Survey Questions**

Q1. Email Address

Q2. Today's Date

Q3. Institution Name

Q4. Collection Size - OPEN ENDED RESPONSE

Q5. Number of oral history interviews conducted per year - multiple choice:

1. 1-50
2. 51-100
3. 101-250
4. 251-500
5. Other:

Q6. Number of oral history interviews managed per year - multiple choice:

6. 1-50
7. 51-100
8. 101-250
9. 251-500
10. Other:

Q7. Describe the resources that your institution devotes to oral history [for example, dedicated people, \$, equipment, grants, and other resources]. - OPEN ENDED RESPONSE

Q8. Describe your collection: e.g., its quantity, scope, etc. - OPEN ENDED RESPONSE

Q9. What do you do to make your interviews accessible? - OPEN ENDED RESPONSE

Q10. What does "accessible" mean to you? - OPEN ENDED RESPONSE

Q11. How would the public (or your community) discover your oral histories? - OPEN ENDED RESPONSE

Q12. Talk about what makes oral history "special" (or, difficult), in your experience. Or, what makes oral history "easy" if that's your experience. - OPEN ENDED RESPONSE

Q13. In your institution's workflow, when do oral histories get described? (check all that apply)

1. Before interviews are conducted
2. After interviews are conducted, before they move to the archive
3. After interviews are conducted and moved into the archive
4. During processing of a collection
5. During upload to online website/content management system

Q14. If you'd like, please explain more about the above questions. - OPEN ENDED RESPONSE

Q15. In your institution, how do oral histories get described? What tools and/or standards are implemented? - OPEN ENDED RESPONSE

Q16. Think about your system for making interviews discoverable, available, understandable, and usable. How are things working for you? (mark only one oval)

1. Really not well
2. *blank*
3. *blank*
4. *blank*
5. Fantastic!

Q17. Please explain your answer above.

Q18. How are things working for you, Part 2: what's working well? what limitations do you face? What needs are being met? What prevents you from doing more? - OPEN ENDED RESPONSE

Q19. Is your institution fully capturing everything that's important to know about an oral history interview, and/or an oral history collection? - OPEN ENDED RESPONSE

Q20. Does your institution have an efficient workflow? What would/could improve it? - OPEN ENDED RESPONSE

Q21. Does your institution's descriptive practice make room for technology changes? - OPEN ENDED RESPONSE

Q22. Your Turn! In the form of a short answer here, or a supplemental written, audio, or video essay emailed to [oha.metadata@gmail.com](mailto:oha.metadata@gmail.com) -- tell us anything else you think our community should know about your metadata practices - OPEN ENDED RESPONSE

Q23. May we publish your responses in the work we produce (including our anticipated metadata ecosystem)? Mark only one oval.

1. Yes, you have my permission to publish my survey responses, including (but not limited to) quotes.
  2. No, you do not have my permission to publish my survey responses. Responses may only be presented in anonymous, aggregate form.
  3. Other - you have my permission, with conditions. (Please specify conditions in an email to [oha.metadata@gmail.com](mailto:oha.metadata@gmail.com))
- 

## Phase 2 Survey Questions

Q1. Email Address

Q2. Today's Date

Q3. Institution Name

Q4. Collection Size - OPEN ENDED RESPONSE

Q5. Number of oral history interviews within your collection - OPEN ENDED RESPONSE

Q6. Number of oral history interviews conducted per year (Mark only one oval)

1. 1-50
2. 51-100
3. 101-250
4. 251-500
5. Other

Q7. Number of interviews you collect each year that were conducted by others outside your institution (Mark only one oval)

1. 1-50
2. 51-100
3. 101-250
4. 251-500
5. Other

Q8. Total number of hours per week spent working with oral history collections (ALL staff, students, volunteers, etc) - OPEN ENDED RESPONSE

Q9. Describe the resources that your institution devotes to oral history (for example, dedicated people, \$, equipment, grants, and other resources) - OPEN ENDED RESPONSE

Q10. Describe your collection, e.g., its scope and content - OPEN ENDED RESPONSE

Q11. How do you make your interviews accessible? What does "accessible" mean to You? - OPEN ENDED RESPONSE

Q12. What role does metadata play in making interviews accessible? - OPEN ENDED RESPONSE

Q13. How would the public (or your community) discover your oral histories? - OPEN ENDED RESPONSE

Q14. Talk about what makes oral history "special" (or, difficult), in your experience. Or, what makes oral history "easy" if that's your experience. - OPEN ENDED RESPONSE

Q15. . In your institution's workflow, when do oral histories get described? (check all that apply)

1. Before interviews are conducted
2. After interviews are conducted, before they move to the archive
3. After interviews are conducted and moved into the archive
4. During processing of a collection
5. During upload to online website/content management system

Q16. What metadata do you create / capture before interviews are conducted? - OPEN ENDED RESPONSE

Q17. What metadata do you create / capture after interviews are conducted, before they move to the archive? - OPEN ENDED RESPONSE

Q18. What metadata do you create / capture during processing of a collection? - OPEN ENDED RESPONSE

Q19. What metadata do you create / capture after interviews are conducted and moved into the archive? - OPEN ENDED RESPONSE

Q20. What metadata do you create / capture during upload to online website/content management system? - OPEN ENDED RESPONSE

Q21. In your institution, which descriptive standards and/or tools do you use for oral histories? \* - OPEN ENDED RESPONSE

Q22. Think about your system for making interviews discoverable, available, understandable, and usable. How are things working for you? (mark only one oval)

1. Really not well
2. *blank*
3. *blank*
4. *blank*
5. Fantastic!

Q23. Please explain your answer above: What's working well? What limitations do you face? What needs are being met? What prevents you from doing more? - OPEN ENDED RESPONSE

Q24. Does your institution fully capture everything that's important to know about an oral history interview, and/or collection? What could be added? - OPEN ENDED RESPONSE

Q25. Does your institution have an efficient workflow around the tasks that involve metadata? What would improve it? - OPEN ENDED RESPONSE

Q26. How does your institution's descriptive practice make room for technology Changes? - OPEN ENDED RESPONSE

Q27. Is there anything else you think our community should know about your metadata practices? - OPEN ENDED RESPONSE

Q28. May we publish your responses in the work we produce (including our anticipated metadata ecosystem)? Mark only one oval.

1. Yes, you have my permission to publish my survey responses, including (but not limited to) quotes.
2. No, you do not have my permission to publish my survey responses. Responses may only be presented in anonymous, aggregate form.
3. Other - you have my permission, with conditions. (Please specify conditions in an email to [oha.metadata@gmail.com](mailto:oha.metadata@gmail.com))

Q29. If you have any documents, screenshots, etc of your workflow or other materials that illuminate your descriptive practices, we'd love to receive them. Please email attachments to [oha.metadata@gmail.com](mailto:oha.metadata@gmail.com).

## Accessibility

**How do you make your interviews accessible?**

**What does "accessible" mean to you?**

## Respondent Quote

*“Ideally, for purposes of accuracy and quality history, we believe it's our duty at [Institution] to try to make the collection as open as possible while fully respecting the rights of those who can claim recordings and interviews as their intellectual property.”*

## Respondent Quote

*“We allow researchers to visit our Archives reading room at our Central Library to listen to full interviews, but no one ever does this. We have edited clips from the interviews that we put on our program's website in curated galleries and on our digital archives website where people can listen to them.”*

## Respondent Quote

*“Our oral histories are discoverable in WorldCat, online search engines, Google Books, or our online catalog. Most patrons enter a name in a search engine and if we have an oral history with that person, it will show a hit.”*

## Respondent Quote

*“Anyone is free to read, listen, view, download and use materials.”*

## Respondent Quote

*“The transcripts are indexed by name and a basic list of subjects. Audio recordings are available to listen to as well as make copies. Nothing is accessible online, but it is available for researchers and I work hard with reference requests to include collections from our oral histories.”*

## Respondent Quote

*“We make our interviews accessible by putting them on our website and promoting them through our social media accounts. Accessible to us means that can be readily available to everyone that has an interest in them.”*

## Metadata's Role

**What role does metadata play in making interviews accessible?**

## Respondent Quote

*“All of our oral history program interviews are cataloged at the item level (so each one has a publicly available catalog record as soon as it is accessioned). In addition, each interview has an Accession Record and a Collection Record in our CIS. The data in these records may be pushed to our Catalog record and our website, depending on the field.”*

## Respondent Quote

*“We catalog every clip, including assigning subject headings. We create VRA Core records, where every interview is cataloged as a collection with all clips, photos of the interviewee that they have donated, our timecode outline we've created and any other materials from that person, are all part of the collection.”*

## Respondent Quote

*“Documenting larger contextual information regarding why they were created, when, by who -- also technical to keep track of where audio recordings / digital files are saved, format, etc., to maintain ability to play back in the future.”*

## Special Nature of Oral History

**Talk about what makes oral history "special" (or, difficult), in your experience. Or, what makes oral history "easy" if that's your experience.**

## Respondent Quote

*“For newly created oral histories there are many parts to coordinate which makes it more difficult - permission forms, audio recordings, word processed documents, HRB office, community volunteers. And then serving these online means keeping track of permission to go online, providing both audio and text files, and means to keep these linked both intellectually and in display interfaces.”*

## Respondent Quote

*“I would say the rights management piece is that main thing that differentiates administering oral history interviews from most other archives/manuscripts/monographs/etc. Rights statuses change over time, so you have to keep on top of the metadata elements that track access and use functions. It has a profound impact on reference workload and donor relations, if you do not.”*

## Respondent Quote

*“Special because they are primary sources of personal information as well as “historical” information. Provides an intimacy (especially audio recordings) that is not available from other sources. It is difficult to inform users of their availability.”*

## Respondent Quote

*“The many steps in the process to make the OH available, in some way, to the public (whether it be just the description/catalog record of the interview all the way to full audio access) are complicating.”*

## Respondent Quote

*“Helping researchers find historical nuggets that they didn't know existed or helping family connect with the voices of their ancestors is indeed a special feeling.”*

## Respondent Quote

*“Oral history allows the ‘common’ person to have a historical voice and share his/her experiences and perspectives on historical events with the world. This allows us to create a much fuller, more complete picture in the historical narrative.”*

## Efficient Workflow?

**Does your institution have an efficient workflow? What would/could improve it?**

## Respondent Quote

*“I think we do well with what we have. The fact that we have been unable to get technical support assigned to maintaining and updating our database is an ongoing problem that causes numerous delays. A system that was designed to manage the entire workflow from beginning to end would also be helpful--our database is designed as a final repository, not a means of tracking or processing an interview.”*

## Respondent Quote

*“Yes, but we are constantly improving workflow. Currently, we need to provide more accurate and comprehensive description at the point of accession, which means more details needed from our interviewers, project partners and donors.”*

## Respondent Quote

*“As a university program, there is frequent turnover of our student staff. New staff members are trained every semester, and each is limited to 8-10 hours of work per week. As a result, our processes are meted out somewhat piecemeal, and workflows may often change to accommodate different workers. We have detailed workflow manuals for most activities, and all work is quality-checked by at least one other staff member.”*

## Appendix C: List of OHAMTF Presentations, 2013-2020

*Metadata for the Masses: Introducing the OHA Metadata Task Force's Element List & Online Tool*

Lauren Kata, Natalie Milbrodt, Steven Sielaff, and Jaycie Vos. Oral History Association Annual Meeting, Virtual Conference, 2020

*That Sounds Just Like Me! Leveraging User-Centered Design Personas to Inform Your Metadata Practices for Oral History Collections*

Lauren Kata, Natalie Milbrodt, Steven Sielaff, Jaycie Vos, Jennifer Hecker, Brian McNerney, and Allison Kirchner. Society of American Archivists Annual Meeting, Austin, TX, 2019

*A Vote for Metadata: What's Most Important to Know?*

Lauren Kata, Natalie Milbrodt, Steven Sielaff, and Jaycie Vos. Oral History Association Annual Meeting, Montreal, QB, Canada, 2018

*Surveying the Field: An OHA Metadata Task Force Roundtable*

Lauren Kata, Steven Sielaff, and Jaycie Vos. Oral History Association Annual Meeting, Minneapolis, MN, 2017

*Metadata: Not Your Average Toothbrush*

Lauren Kata, Cyns Nelson, Steven Sielaff, and Jaycie Vos. Oral History Association Annual Meeting, Tampa, FL, 2015

*Crafting the Core: Whose Voice Matters? Yours!*

Lauren Kata, Natalie Milbrodt, Nancy MacKay, Cyns Nelson, Oral History Association Annual Meeting, Oklahoma City, OK, 2013

*The Development of a Shared Metadata Standard for Use in Oral History Collections*

Jaycie Vos, Oral History Association Annual Meeting, Oklahoma City, OK, 2013