

**GUIDELINES FOR THE NKOSI ALBERT LUTHULI YOUNG HISTORIANS'
AWARD 2011**

Message from the Director-General of Basic Education

This guidelines book aims to support both teachers and learners in their oral history projects. It promotes the understanding and implementation of oral history methodology in the classroom context.

The primary purpose of these oral history guidelines is to assist teachers and learners in developing viable oral history projects for the National Curriculum Statement and the Nkosi Albert Luthuli Oral History Competition.

The National Curriculum Statement has provided a valuable space for the teaching and learning of oral history from Grade R-12 as the curriculum promotes the teaching of an inclusive history and the use of different historical sources in history teaching and learning. The new Curriculum and Assessment Policy Statement (CAPS) also attaches great importance to the infusion of human rights and Indigenous Knowledge Systems (IKS) in the curriculum.

The Department of Basic Education has been co-ordinating the Nkosi Albert Luthuli Young Historians' Award for Grades 9-11 for the past five years. Learners and educators have supported the project with great enthusiasm as the quality of entries from provincial competitions continues to improve.

Different adjudicators have, in the past five years (since 2005), identified similar areas that need improvement. These areas are;

- The selection of topics
- The role of the teacher in the oral history research project
- The importance of background research before undertaking the oral history research (interviewing)
- The inability of some learners to put selected oral history topics in a historical context

- Oral History Method in Practice
- Preparing Oral History Interview
- Doing/Conducting Oral History Interview
- Transcribing
- Presentation of research findings
- The identification of interviewees
- The use of technology in oral history research (DVDs, video footages and photographs, Diaries, Clothes/Artifacts, Maps)

The guidelines also deal with these challenges by offering advice and guidance.

I trust that the enclosed oral history guidelines would add value to your research projects and strengthen the application of oral history methodology across the curricula.

Mr PB Soobrayan
Director-General
Department of Basic Education

CHAPTER ONE

Oral Traditions and Oral History

“All history was at first oral”

Philosopher-historian William Robertson,
Principal of Edinburgh University.¹

UNESCO - *General History of Africa: Volume I* titled, **Methodology and African Prehistory** outlines the sources and materials from which African history has been constructed and describes the research methodology employed by historians. It goes on to discuss the state of these sources, African archaeology and archaeological techniques, and the contribution of linguistics to history.²

Three main sources are available for the historical investigation of Africa: written documents, archaeology and oral tradition. For the purposes of the Nkosi Albert Luthuli Oral History Competition, our focus would be on the third source, *Oral Traditions*.

“Oral Tradition is a living museum of the whole stock of socio-cultural output stored up by peoples who were purported to have no written records. The old men who are its custodians have become the last vestiges of an ancient landscape which historians are seeking to restore. As the African proverb goes: ‘The mouth of an old man smells bad, but good and salutary things come out of it.’ Oral tradition provides clothing and colour, it puts flesh on the bones of the past.”³

¹ History Today - **Oral History** and the Historian : **Paul Thompson** www.historytoday.com/dm

² www.unesco.org/culture/africa/html_eng/volume1.htm

³ *UNESCO - General History of Africa: Volume I, Methodology and African Prehistory*, (Abridged Edition), ed., J.Ki-Zerbo, South Africa: new Africa Books, 2003, (UNESCO: 1981 & 1990), p.3.

Oral History is the method, mechanism and tool that are employed to capture and record the oral traditions. Oral history could be defined as *the systematic gathering of historically significant, personal memories, recorded mechanically, for archival preservation and use.*

Oral history is an important tool in the preservation of local and community history. In an increasingly computerized society we do not write letters or keep journals as past generations did. The result is a loss of much of the personal side of history. Through oral interviews we can restore personal insights, including emotions and motivations, to the historic record. Oral history is not, however, as simple as talking to older folks about their lives. Good oral history interviews come as the result of careful preparation and sustained enthusiasm. With some preparation, a love of history and a healthy respect for the power of personal memories you can gather some amazingly detailed and nuanced stories.⁴

Paul Thompson, the author of *Voices of the Past*,⁵ a noted historian clarifies the role of oral history when he argues that “oral history allows the original multiplicity of standpoints to be recreated. A much more rounded, realistic and fair reconstruction of the past can be arrived at by calling the subjugated voices to talk back and rectify the dominant accounts of the past contained in archival sources.”⁶

Oral history appears in two forms. The first form is called **oral testimony** because it is the first hand or eye-witness account of what a person has seen, done or heard in the past.

⁴ Introduction to Oral History interviewing, Montana Historical Society, Oral History Program Pamphlet #1.

⁵ Paul Thompson, *The Voice of the Past* (Oxford University Press, 1978);

⁶ Katie Mooney, Why is Oral History important?, article in Oral History Roundtable for Gauteng, hosted by the Department of Education and the Wits History Workshop, (29-30 August 2005), pp.9-13.

Secondly, **oral tradition** that is passed down by word of mouth from generation to generation is another source of oral history. Oral tradition is not contemporary.⁷ Genealogies and praise songs of past amakhosi/inkosi/kgosi in indigenous societies are examples of oral tradition.

Oral tradition is less detailed and brief as in most cases it dates back to 300-400 years or more. The oral historian is expected to extract the motive.

The historian Paul Thompson states that it is through oral history that the voices of the marginalised could be heard as oral history records the achievements, challenges and failures of ordinary people (workers, the landless, the youth, women, gay and lesbians, and the aged) who normally do not find a space in history.

It is also relevant in the reconstruction of previously subjugated countries where the oppressed were not allowed to write their histories from their perspectives. It thus plays a crucial role in the reconstruction of transitional societies.⁸

In the South African context, oral history has been used to challenge/ counter stereotypes such as people were always divided on the basis of ethnicity and race, the “Empty Land” myth which justified land occupation by Dutch colonists, colonial historiography which distorted the contribution of indigenous **Africans** and Black communities to South African history and exaggerated the role of colonialism in Africa, presenting it as a civilising mission.

On the other hand, social historians have used the oral history methodology to research and write about the daily experiences of working class and uprooted communities in South Africa. The example of these is the *Alexandra Oral History*

⁷ John Tosh, *The Pursuit of History*, (Longman, London & New York, 1991), p.206.

⁸ See *Interviews Section* in The Road To Democracy Project at The South African Democracy Education Trust (SADET), www.sadet.co.za/

Project, The Robben Island Museum Memories Project, The Road To Democracy Project (SADET), and Oral History Project on the history of the liberation struggle that has recorded the previously excluded voices of South Africans and helped later scholars to re-write the history of South Africa with a more inclusive and fresh interpretations about the past.

Oral history interviews are most successfully used to fill in the gaps of the historical record. Any oral history project must, therefore, begin with some basic questions. ***What is the purpose of the project? What has already been done on this topic? How can oral interviews add to the existing data? What kind of end product is desired?*** (See appendix for project planning work sheet) These questions can be answered with a little planning and research.

Oral history—and history in general—plays an important role in the promotion of national unity and reconciliation. *The History and Archaeology Report of the South African History Project*, (updated 2002), states that history could help the nation to understand “How has South Africa come to where it is today? How do we understand the growth of life and societies here? What can history bring to the understanding of life and societies here? History provides a usable past to understand the present. This understanding helps South Africans to work together and build a peaceful nation”.⁹

⁹ *Report of the History & Archaeology Panel to the Minister of Education*, 2002, p.7.

CHAPTER TWO

Preparation for Oral History Research

Both teachers and learners are requested to take into account the following factors;

- i. Larger community history projects should create a project committee to divide tasks and compile data. Even individuals conducting family history or single interviews, however, need to do research as well. Research provides context for the interviewees' life, thus providing a framework for questions. You will want to find out about the community they lived in, the people that shaped their lives, the occupations they worked in, and the issues that shaped their worldview...be they political, religious or economic. The importance of this stage in interview preparation cannot be overestimated.

- ii. To start your **research**, contact your *local library* or historical society. They can help you locate basic histories of your community, newspapers, photographs, genealogical writings, and records from history projects that have already been done. If you are doing interviews relating to an organization, review their minutes and newsletters to see what issues were important. If you are doing family history go on-line to see if genealogy sources exist. Talk to family and friends of the interviewee to get ideas about what to ask. Explore every source you can think of to find out what is already known and what needs to be learned about the interviewee.

- iii. From your research you can more intelligently decide whom to interview and on what topics. The goal is to choose a **manageable topic that does not reproduce work already done**. In other words if you find from your research that a great deal has been written on mining in your community, narrow your project to an aspect of that history that has not been discussed (i.e. how miners supported each other and their families during strikes).
- iv. Once you have chosen a topic, you should create an **Outline of Questions**, which is referred to as a **Questionnaire**. The outline can be very specific or just a list of ten topics. The idea is to give you a **Roadmap** for the interview. This keeps you from having a meandering reminiscence rather than an organized, thoughtful and in-depth interview.
- v. When you know what you want to ask, you can begin **Selecting Interviewees**. Good interviewees have **first-hand knowledge** of the topics of interest; have the physical and mental ability to share; and are willing to openly share their memories. You may find there are just too many people that “should be interviewed”. Finding ways to choose between them can become crucial to the project’s success. Balancing varied points of view is a good tool to use in deciding whom to interview. In other words ten interviews with people of similar viewpoints will leave a stilted historic record. Interviewing ten people from various backgrounds and with varying ideas will be more representative of your topic and community.

- vi. The final stages in creating good oral histories are purchasing **good equipment**, learning **interviewing skills**, and getting lots of **practice**.
- vii. Read all the topics and then assess whether you have enough sources for the chosen topic. Learners tend to choose a popular topic and thereafter quickly run out of sources. Make sure that you are interested in the topic and you can find both written and oral sources in your immediate environment. Decide your research goals. Do not be disappointed when your goals change in the process, because any research begins with a hypothesis or assumption that your research would prove correct or incorrect, depending on the results of your findings from the data/information you would have collected and conducted.
- viii. Take into account the budget, equipment and time frames for the project. Do not put yourself in a situation where you should travel long distances in order to find interviewees.
- ix. Conduct background research (use non –oral sources such as newspapers, books and magazines). This is critical, as you cannot have insight to formulate good questions without conducting background.
- x. How will you select the interviewees? This question is largely answered by your research goal. What do you want to achieve?
- xi. Select potential interviewees.
- xii. Conduct interviews.

HOW DO YOU DO ORAL HISTORY?

❖ CONDUCTING RESEARCH

Research is an often-overlooked step in conducting interviews.

Some good reasons to conduct research:

- No one lives in a vacuum. Placing your narrator within their historical

context is essential to understanding why they made the decisions they did.

- Research shows the narrator you are serious about the project.
- Research allows you to form a knowledge base from which to ask intelligent questions.
- You gather more specific information by knowing some key phrases that will stimulate the memories of your narrator.
- Having a good research base makes oral history collections much more attractive to historians, thus ensuring the collections use and future life.

There are many resources available including:

- College or university libraries archives and special collections.
- City libraries or historical societies databanks (look for archives, genealogy collections, local history collections, newspaper files, and oral history collections).
- Provincial and local government records.
- Church records.
- Oral History Association of South Africa [www.ohasa.org.za]
- Interlibrary Loan services.
- Private collections (magazines, photos, drawings, mementos, scrapbooks, letters, sheet music, recipe books).

Remember to file all research materials with the tapes.

❖ **CHOOSING TOPICS**

Once you start the research you will realize you can't possibly do all the topics and interviews that need to be done. You will also find that some things have already been done. Make decisions about what you want to accomplish and how

to make your goals attainable. For instance it would be difficult to conduct a project on the history of Bear Creek, Montana. The number of potential narrators and topics would overwhelm you. Trying to interview everyone would be very difficult, and more importantly could result in interviews lacking depth. If you decide, however, to narrow the focus to Slovenian families in Bear Creek, you would have more preparation time and thus a better chance of getting in-depth information. If you find more topics to cover, plan another project! A series of well-organized small projects is more useful than a large disorganized project.

❖ **CREATING OUTLINES**

Your research should lead naturally to a list of topics. From these topics you should create a **project outline** (see appendix). Outlines are an essential tool in oral interviewing. They give both the interviewer and the interviewee a road map for the interview. An outline should be organized chronologically. Each outline should follow this basic format: basic biographical information about the interviewee (family history, education, hometown); questions based on your topics (arranged chronologically); and a final illustrative story or summation.

The outline should be given to the interviewee to help them prepare for the interview. Keep the length down to one or two pages though, so you do not overwhelm them. Your copy can be much more in depth if you prefer. Remember, however, that the outline is a rough guide. If the interviewee is telling you a great story do not interrupt them. Good interviews result from following the basic outline, but allowing for side trips where some of the richest stories can often be found.

❖ **CHOOSING A NARRATOR**

This can be the most difficult part of preparing for an oral history project. At every turn you will find people who “should be interviewed”. Only a small portion

of those, however, will fit your needs. Conducting a pre-interview is a good way to decide if the person is really appropriate for your project. Create a **questionnaire/pre-interview worksheet** (see appendix) for potential interviewees to fill out that will reveal their role in the events you are seeking information on. While the questionnaire is completed you can chat with the person to see how vivid their memories are. From this you should be able to tell if the person is appropriate. Those who fit your needs can be asked if they would mind being interviewed. Those who do not, can be thanked for filling out the questionnaire and providing background for the project.

Some general rules to follow when choosing a narrator:

- Make your decision based on the quality of information the person can share, not their age. Not all older people will make good sources.
- Choose someone who wants to talk to you.
- Choose someone who has **firsthand** knowledge of your topic.
- Choose someone who is mentally, physically, and intellectually able to share their memories.
- Choose the best interviewee but be sure to take into consideration the potential of losing good stories. Sometimes the best person to interview first is the one whose memories are most likely to be lost. The health of the interviewees should be taken into account. It is very sad when a potential interviewee passes away before you are able to interview them.

- Choosing the “local historian” to interview first has positive and negative implications. They often have a lot of information, but it is not firsthand information. However, they may be the key person needed to get names of potential interviewees, provide research information, and be a great promoter of the project. Take both into account before you decide who to interview first.

❖ **CHOOSING EQUIPMENT**

You do not need to spend a lot of money to get adequate equipment. Here are some things to look for:

Cassette tape recorders

- AC\DC capabilities (household current or batteries)
- Outside microphone capacity
- Pause button
- Recording light indicator or VU meter
- Manual volume/recording control (Avoid voice actualized or activated as it presets volume and cuts off end phrases)
- Tape counter (can be used for indexing, although I prefer a stop watch!)
- Clear top so you can see the tape is recording
- “Line-in” and “Line-out” for tape duplication or if funds allow buy a high-speed duplicator

Cassette tapes

- 60-minute tapes only, longer tapes stretch and are thinner
- Avoid micro-cassettes as they are difficult to copy and tend to stretch over time
- Screw mounts to allow repair
- Normal bias (designed for music and voice)

Digital recording

- Minidisc, CD and Digital Recorder technologies have superior sound in most

cases, but there are drawbacks. The medium is very small, therefore more difficult to handle and the tapes/discs are easier to lose. Transcription is also more difficult since transcription machines are oriented towards cassettes. There are software packages that will allow you to transcribe directly on your PC. You will need to purchase a set of headphones and foot pedal (examples of software and equipment are Media Player 9 & Vpedal, Express Scribe with Vpedal). There are some concerns you must address however with these newer technologies. Be sure that you have backups of your recordings in another medium. In other words if your original recording is a CD be sure to back it up on to your computer as a .wav file or as a cassette. This will allow for better security and long-term access.

Microphones

- Dynamic microphone (operated from the recorder's power source)
- Omni-directional (picks up sound in all directions. But be aware of stray noise in the room! These are powerful microphones.)

Video equipment

- External microphone (line-in and line-out for duplication of audio to cassette or CD)
- Sound mixer
- Light stands, lamps (to get 3-point lighting)
- Monitor (to see what you are recording)
- Books on the basics of camcorder operation and good filming techniques, lighting, editing, and composition

❖ CONDUCTING INTERVIEWS

Once you have chosen a narrator contact them and make arrangements for the interview, discuss the following:

- A date, time, and location suitable for the narrator to meet. Ideally the interview should take place in the narrator's home. Be sure to get clear directions.
- Explain to the narrator that they will be required to sign a **release form (see appendix)**. This is for their protection as well as the institution or individual conducting the interview. Most historians and historical institutions will not accept interviews without release forms to protect against libel.
- Explain how the tapes will be used for your project. (i.e. If you plan to donate the tapes to a library let the narrator know the tapes will be made available to the public).
- Explain in detail the purpose of the project to the interviewee. Include here time lines, descriptions of final product, and the expected role of the interviewee at every stage. Also discuss the expectations the interviewee should have of you (courtesy, timeliness, respect of boundaries etc.).
- Invite them to review the outline, personal letters, photographs, scrapbooks, clippings or mementos that might stimulate memories before the interview.

Just before the interview:

Go through your **equipment checklist (see appendix)** to be sure you have everything. Put an introduction on the tape consisting of the date, name of the narrator, your name, the topics to be discussed, and the location of the interview. This will help identify the tape later and is a good way to check to see how the recorder is working. Always play the introduction back to see if the recording levels are acceptable etc. Call the narrator before you leave for their home to ensure they are ready.

At the interview:

Once you are invited into the narrator's home look for the best place to set up. Be aware of extraneous noises including traffic, heat registers, fans, playing children, pets, clocks, or televisions. Try to have the telephone turned off if possible. You want the interviewee to be comfortable, so try to work around the furniture and allow them to sit in their favorite chair. The microphone should always face the narrator, and be placed in an accessible but not intrusive spot. Remember that you are a guest, set up your equipment with as little fuss as possible. Light banter about your work on the oral history project will put you both at ease. Once you have your equipment in place, test it by playing back the introduction. This assures you that the equipment is functioning, and reminds the interviewee of the topics. Put the tape on pause and give the interviewee a moment to prepare, and then begin. The interview should start with questions that will ease the narrator into the process...“Please tell me about your childhood”.

Here are some general tips to help you through the interviewing process:

- Ask one question at a time.
- Try to keep your questions brief and concise.
- Start your questioning with open-ended questions and follow-up with requests for clarifications and examples.
- Be sure to have the 6 basics questions answered about each topic—who did what, when, where, why, and how?
- Do not interrupt the narrator during story. If you have a follow-up question or need clarification on spellings, write your question down and ask later. “You mentioned earlier...”
- Be aware of and try to control nervous gestures or fidgeting.
- Keep your eyes on the narrator not the recorder! A quick glance should let you know the equipment is working.
- Remember that the tape recorder cannot see. Clarify narrator statements

about objects. “You are referring to the third gentleman on the left in this 1921 wedding photograph?” Also try to get copies of any documents or photographs for the file.

- Do not interrupt a story because you have thought of a question. Just jot it down and ask later.
- Try not to put your own judgments into a question. Avoid phrases like “That must have been.” “So, then you...” “Okay”
- Avoid asking leading questions--“Tell me about the kinds of discrimination you encountered” Instead use “Has discrimination been an issue in your life?”
- Try to get your interviewee to explain their role in important events or decisions--“Where were you when that happened?”
- If your interviewee requests that some of the tape be restricted, you must comply. **Do not try to erase** during the interview. Assure them that the tape can be erased after the interview is complete. In the mean time try to explain why the statements are needed as a true record of history.
- If your interviewee doesn’t see the importance of the interview, remind them that they have the unique opportunity of joining 5 generations of their family together. Their grandchildren can only know the life of your grandparents through your recollections.
- Be aware of the physical condition of your interviewee. They will give physical cues of fatigue. By suggesting breaks amid the interview, or setting another session, you should earn their respect and probably get a better interview.
- Ask open-ended questions that require the interviewee to give their opinion. Closed questions require a “yes” or “no” or have a predetermined answer. Some key phrases to use are “Please explain” “Discuss ” “Describe ”
- The outline is only a road map. If the interviewee goes off on a tangent that is more interesting than the question you gave, let them go. You can return to your outline later as long as you keep track in your notes.
- If the interviewee goes off on a tangent that is not what you need call them back with--“That’s interesting. Before we go on to that however, I’m a bit

- Do not worry about silences. Let the interviewee collect their thoughts. Use the pause button if necessary (**just remember to press it when they start again!**). Let them tell their story in their own time. The pause button is especially useful if someone has become emotional and needs time to recollect him or herself.
- Show interest through nonverbal cues such as nodding the head or smiling. Do not say “Uh-huh” or “right” as they clutter the tape and make transcribing difficult.
- Use a note pad and pencil to write down questions or clarifications you might need.
- Begin the second side of the tape with a clarifying statement like “You were talking about ”
- Be sure to label the tapes and put them well out of the way when you change tapes. Placing them out of reach will ensure that you do not tape over them!
- Resist the temptation to show off your knowledge. It’s the narrator’s information that’s important.
- Try to establish dates, locations, and key participants at significant points in the narrative--“That was 1964 in Chinook?”
- Be aware of the tape; try to make a natural break at about 30 minutes so you don’t have to turn the tape in the middle of a story.
- Most interviews should not be longer than two hours.
- End the interview with an invitation for the narrator to tell their favorite story or give a summation-- “We’ve covered a lot of ground today. Is there anything I should have asked?” “Is there any topic you would like to return to?”
- **REMEMBER TO GET THE RELEASE FORMS SIGNED BEFORE YOU LEAVE THEIR HOME.**
- Try to set a time for a follow-up interview before you leave.
- Plan to chat for a few minutes before you leave. Accept that piece of cake and coffee. This is a good time to tell them about your interest in the project and what you hope will be done with the tapes.

- Do not unplug your recorder until you are about to leave. Sometimes you get the best stories just after the interview is concluded. By leaving the recorder set up you can get these stories as an addendum.
- Offer to send a copy of the tape and the transcript to the interviewee as a thank you.
- You may want to take a photograph of the interviewee for your files.
- Let the interviewee know that you might have some questions later on.

Group Interviews

Educators and learners can organise group interviews. This approach enables many people to be interviewed at the same time. This is however a challenging approach which requires a lot of concentration and should be ideally videotaped in order to identify each speaker. Group interviews bring out diversity as people remember the past differently.

Protocol to Observe when Interviewing for the Oral history Project.

Most people are working during the week and they have limited time for interviews. Make an appointment and verify it two days before the actual date. The interviewer is the one who needs information from the interviewee and you should arrive on time.

The following points should also be noted;

- i. The interviewee must clearly understand the purpose of the interview and how you intend to use it. She/he should understand that the interview is not a private conversation.
- ii. Start each recording with a statement of who, what, when, and where you are interviewing.
- iii. Listen actively and do not interrupt the interviewee.
- iv. Do not be judgmental- it is not your life.

- v. Ask one question at a time.
- vi. Allow the silences and record them during the interview. Silences also give the interviewee an opportunity to recall and deal with their emotions.
- vii. Ask follow up questions.
- viii. Ask open questions in order to get detailed answers.
- ix. Start with less probing questions e.g. biographical questions before moving to more probing questions. This should be gradual.
- x. Observe the mood of the interviewee. Some questions can be hurtful. Allow the interviewer to recover or re-phrase the question. If he/she wants to stop the interview, respect his/her wishes.
- xi. The interview session should not be more than one to two hours in length.
- xii. Observe the fatigue levels and allow the interviewee to take a break if necessary.
- xiii. Use photos as initial prompts to stimulate memory. A picture of a Second World War soldier in action could only stimulate a conversation at the beginning. Remember, photographs are also subjective, as the photographer does not capture everything.
- xiv. Keep photographs protected by stiff cardboards in envelopes.
- xv. Label borrowed artifacts.
- xvi. Return the originals to interviewees and keep copies of artifacts and photographs.
- xvii. Label and number the recording immediately after the interview. The interviewee's surname and initials, e.g. Ramusi, N. the date and location that the interview was conducted.
- xviii. Ask the interviewee to sign the release form before leaving and write a thank you note. The release form is important for your project as shows that you have gained the information through correct channels.
- xix. Write your field notes immediately after each interview session. Field notes include all matters that you have noted during the interview and those you think require a follow up, like the names of other potential interviewees mentioned by your oral source.

- xx. Return a copy of the transcript to the interviewee before it is used for your project. The interviewee has right to check the transcript and make corrections.
- xxi. Make copies of all the work and give them accession numbers e.g. 102/10.
- xxii. Develop a storage system.
- xxiii. Analyze the interview. Verify facts; compare your results with the goals of your research. Did you get what you want/need? Do you have further questions? Any improvements from your side?
- xxiv. You can request another interview, if necessary.

You should however remember that **multiple** interviews are important as they help you to get different perspectives. Oral history, like all histories is composed of contesting narratives. People remember differently and they have different experiences in the same period. Learners are expected to interview 4-5 people for the Nkosi Albert Luthuli Oral History Competition. A single interview is just not enough.

❖ **PRESERVATION AND ACCESS**

After the interview is over there is still a great deal of work to be done to make sure that the tapes can and are used. The first order of business is to make sure your recordings (whatever media you use) are in safe storage. Seek out established historical institutions that are familiar with the care and maintenance of recorded media. Please consider donating the original tapes to this kind of institution and making use copies for your own use. The recordings will have a wider potential audience and you will be secure in the knowledge that they are being well cared for.

Next you should prepare a tape index, summary, or transcript (see appendix). A transcript is a nearly verbatim, typescript of the interview. Most institutions do some editing. The average time for transcription is four hours for every hour of tape. If time is an issue do a summary instead (see appendix for sample). A summary is a series of paragraphs divided into five to ten minute increments that provide a synopsis of the topics discussed. They take about an hour for every hour of tape. An index is usually a 'name and topic' lists provided at the end of the text, but can also be a series of brief topical sentences referencing a time increment on the tape.

Here are some suggestions:

- The person who conducted the interview should do the index, summary, or transcript.
- Always have the index, summary or transcript reviewed by a member of the staff and the interviewee.
- Check to see that all the materials for your interview are in a folder. Review your notes to clarify questions you will need answered before you begin the transcript or summary.
- Do a self-evaluation. Remember that this is a learning experience. No interview is perfect!
- Send an evaluation form to participants to fill out. This will help you do your job better and will be appreciated by the participants.
- Be sure to give the interviewee a copy of the final product.
- Once you have completed the project, you might want to have an informal party or get together. Invite **all** the participants: interviewers, interviewees, transcribers, and other staff members. Put together a scrapbook of photos or interesting materials for the participants to look at.
- **HAVE A GREAT TIME AND GOOD LUCK!**

CHAPTER THREE

The Release Form for Oral History Project

The Department of Basic Education has entered into an agreement with the South African History Archives (SAHA). SAHA will archive and digitize the portfolios of the Nkosi Albert Luthuli Young Historians' Award. The material will then be available to students, teachers and researchers. Copyright of the Nkosi Albert Luthuli Competition rests with the Department of Basic Education.

Release Form (attached overleaf) should be used for the Nkosi Albert Luthuli Oral History Competition:

RELEASE FORM
Nkosi Albert Luthuli Oral History Competition

(On School Letterheads)

RESTRICTIONS:

Date of Interview:

Date of
Agreement: _____

Interviewee's Name
(printed): _____

Interviewee's Name
(written): _____

Interviewee's Mailing Address:

Interviewer's Name
(printed): _____

Interviewer's Name
(written): _____

The purpose of this project is to collect oral testimonies of a particular period or event in history as part of the Nkosi Albert Luthuli Oral History Competition. This project falls under the Department of Basic Education.

I understand that these interviews (tapes and transcripts) will be deposited in the South African History Archives (SAHA) for the use by future students, educators and researchers. Responsibility for reproduction, distribution, display, and the creation of derivative works will be at the discretion of the Department of Basic Education and the South African History Archives (SAHA). I also understand that the tapes and transcripts may be used in public presentations including, but not limited to, books, audio or video documentaries, slide-tape presentations, school exhibits, articles, or presentation on the websites of the Department of Basic Education and the South African History Archives.

In making this contract, I understand that the copyright of the Nkosi Albert Luthuli Oral History Competition material rests with the Department of Basic Education. This gift, however, does not prevent any use that I myself want to make of the information in these transcripts and recordings.

Signature of the Interviewee

Type or Print Name

Address

Date

CHAPTER FOUR

Asking Oral History Questions

The interview schedule

The interview schedule helps you to establish a solid foundation with your interviewee. It is also important for a life history project. The interview schedule should contain the following;

- Family life and early life
- Personal background (name, employment, first job, residential address)
- Sports, hobbies, cultural activities
- School background (schooling, favourite subject/s, attendance)
- Movement to different places.¹⁰

Leading and open questions

It is important for you to develop key questions that will keep you focused and also lead to long answers. That is why learners are encouraged to formulate open-ended questions. Avoid leading questions as they lead to “yes” or “no” answers. The example is, “Was farming difficult during the Great Depression in the 1930s? The answer would be “yes”, it was difficult or “no”, it was not difficult. **Leading questions** are not recommended for an oral history project as they give you limited information. However, if you structure a question like this, “What was it like farming during the Great Depression in the 1930s?” You are likely to get a long response that also includes the thoughts of the interviewee during that period. This is an **open** question.¹¹

¹⁰ Robben Island Museum, Reading the Transcript: Preserving and Analysing the Recorded Voice, 2nd Annual Oral History Colloquium, 5 April 2008, pp.70-78.

¹¹ *Ibid.*

It is important to re-ask and re-phrase important questions in order to get maximum information.

Non-verbal communication

Non-verbal communication can either make or break your interview. It is important to understand the cultural background of the interviewee. Eye contact is important in certain cultures as it shows trust and honesty. In other cultures, young people are not allowed to make eye contact with the interviewee. It is seen as a sign of disrespect. Teachers could guide learners on this aspect.

Nodding and smiling encourages the interviewer to participate as you are displaying interest as an interviewee.

The dress code is important. Learners are encouraged to wear school uniform or dress in an acceptable manner as this gives legitimacy to their project and shows respect for the interviewee.

It is therefore important to understand the local culture of the people. For example wait for the owner of the place to give you a chair to seat, you cannot seat anywhere in the house.

Handling General Statements

General statements are not helpful in an oral history project. What you need are historical facts for your project. Ask for specific examples if the person makes a general statement such as “South Africans hate all people from other parts of the world”

You could say, “Could you explain in more detail?”

In certain areas, people use unique phrases when speaking. Ask the meaning of unfamiliar words and why those people in a given context used such words. This will assist you in the analysis and interpretation of your oral history sources.

Putting Questions in a Historical Context

Your questions as a researcher should always be linked to the historical context. For example, in the 2009 Nkosi Albert Luthuli Oral History Competition, some learners interviewed South Africans and foreign nationals under the topic of Xenophobia. Most of the questions only generated opinions (e.g. “the human rights of foreign nationals were violated”, it was against the Constitution to attack foreigners”).

These responses were legitimate and correct but were not placed in a historical context.

Apart from xenophobic violence, there should be questions that establish the reasons for migration to South Africa, the experiences of foreign nationals in South Africa, their journeys to the country and prejudices in their own countries. There are always push and pull factors in migration. Learners should understand the histories of the different countries of the world. This requires background research (reading of newspapers, magazines and books). Educators could organise bibliographies for learners after they have selected their topics.

For example, teachers could organise materials on the history and conflicts of the Great Lakes in order to understand the plight of the Congolese, Burundian and Rwandese citizens in South Africa. The same applies to the plight of Somali refugees/ economic migrants in South Africa.

School excursions could be conducted as part of background research for other oral history topics, too. These excursions could include visits to libraries, extension of invitations to local historians and visits to historical sites.

Probing Questions

Probing questions encourage the interviewee to expand on a particular point. For example, Can you tell me more about that? The aim here is to get more details, which are relevant for your project.

Double-Barrel Questions

These questions have two questions in one, for example, “How did you speak with German prisoners of war and who taught you the language? This type of question is **not recommended** for oral history because it causes confusion. You are expected to ask one clear question.¹²

Remember, feelings and thoughts are part of the oral history project. They assist you in the analysis and interpretation of the past and present. Recording these feelings will be discussed in the next chapter on **transcribing**.

Challenges in an Oral History Interview

In most instances learners, as young people, are expected to interview older members of the community. Oral historians interviewed some of these members before. They could also have their own personal agendas (they want to tell stories, could exaggerate their roles in events, or promote particular causes).

¹² *Ibid.*, p.82.

As a result of their life experiences these interviewees have the capacity to take over the interview and dominate it. This is called **power relations** in an interview. The interviewer should be able to focus on his/her research questions.¹³

This can, however, be managed properly if the learner has conducted background research, has a set of key questions and an interview schedule to guide him/her.

Traumatic experiences also pose many challenges for the interviewer. People involved in traumatic experiences such as political violence may ignore chronology or historical facts and speak about their psychological understanding of the event. They could compress two events into one or develop their own narratives.

A person murdered in Johannesburg police cells in late 1975 could be linked to the June 1976 Soweto shootings. The story is factually incorrect but it tells us about the brutality of the police in apartheid South Africa during that period.

Oral history accounts of this nature are **subjective but still relevant** as they tell us about a people's understanding of a particular period and their attitudes towards certain decisions/ actions that affected them¹⁴.

It is the task of the oral history student, without embarrassing the interviewee, to put these experiences in a historical context.

In many instances, local people do not like to speak about painful past experiences. Teachers and school management structures need to introduce the oral history competition to parents and other members of the society.

¹³ Oral History, A Guide for Educators, (Wits History Workshop, 2004), pp.31-33.

¹⁴ Allesandro Portelli, "Frontiers of Memory: The Massacre at the Fosse Ardeatine. History, Myth, Ritual and Symbol", paper delivered at the 2nd Annual Oral History Colloquium, Robben Island Museum, 2008.

Interviewers should not be emotionally involved in their research. They should remain professional at all times. This means that interviewers should not impose their own views on the interviewees. This could compromise the quality of the research and could lead to a breakdown of trust between the interviewer and the interviewee.

Post- research activities that could encourage community participation in school oral history research projects;

- School exhibitions
- Articles in school magazines
- Plays
- Documentaries and films

CHAPTER FIVE

Transcribing the Interviews

Firstly, a copy of the tape must be produced from the original tape for purposes of security and preservation. The master copy must never be edited. It should be treated as a document and be kept in a safe place.

When translating, the tape in the original language should also be preserved as a document. The translated version should be indicated as such.

A transcript is regarded as a precise and accurate written record of an interview. The best way is to tape the interview, then transcribe the interview from the tape.

The transcript should reflect what the interviewee communicated and how they have phrased it even if the sentences are incomplete.

The transcript should show how the interviewee expressed his/her thoughts and how the interviewee spoke to the interviewer.

Format of Transcripts

- The heading must state who was interviewed, who interviewed them, where and when
- It should state who transcribed the tape and who corrected the transcription
- Style and spelling should be consistent
- The side of the tape used should be noted on the transcript
- The words of the interviewer and the interviewee should be indicated by using their initials, (e.g. RA, NS)
- Any notations added by transcribers should be in square brackets e.g. [inaudible]

- Names of newspapers and Books should be in *italics*.

Transcription Conventions

- Poor sound should be indicated as [inaudible]. This means you could not hear the words on tape.
- Omissions. If there are gaps in the transcript because of interruption, use three dots ...
- Emotions and expressions. Note emotions in square brackets [laughs]
- Summaries: Summaries are used if a portion of the interview is not relevant to the topic. Transcribers should discuss the use of summaries with the interviewer.¹⁵

¹⁵ Reading the Transcript: Preserving and Analysing the Recorded Voice, pp.-84-85.

CHAPTER SIX

Presenting your research project before an adjudication panel

Teachers and learners should note that the quality of presentations is influenced by the stages explained in the previous chapters of this guideline.

1. Adjudicators are interested in both the process of oral history research and the final product (research findings). The portfolio should not only contain your research findings but also the transcripts, the signed release form, primary documents (newspaper/magazine articles and the artifacts that were collected during the research process).
2. The panel requires copies and not originals
3. Sufficient time (30 minutes) could be given to each learner
4. The portfolio should be well organised (see Nkosi Albert Luthuli Oral History Competition guidelines sent to schools)
5. The analysis of the transcripts should show knowledge and understanding of the topic at hand.
6. The research should be placed in a historical context
7. There should be evidence of background research
8. The presenter should have a clear understanding of the verification process, bias and objectivity in research
9. Interviewees should speak for themselves. The interviewer must not replace the interviewee in the narrative. Make use of the extracts from the transcripts.
10. Learners should be prepared to answer questions from the adjudication panel only.
11. Lessons learnt from the research should be clearly stated
12. Present your research in any of the 11 official languages, preferably your first language (see Nkosi Albert Luthuli circular to schools)
13. Speak clearly and avoid the use of difficult words that can give an unintended/vague meaning to the panel

14. Make sure that your technical equipment works before you enter the adjudication hall

CHAPTER SEVEN

THE NATIONAL COMPETITION

All the winners of their provincial competitions will be invited to Pretoria to compete among each other. Each province will be represented by between three to five learners. Learners are expected to arrive on Thursday 06 October 2011 for registration after which they will then be booked into their hotels. Formal adjudication will begin on Friday 07 October 2011 at 0800. Adjudication will be over two days i.e. from 07-08 October 2011. There will be gala dinner on 08 October 2011 at which all learners will receive prizes, including the eventual winners. It is anticipated that the Minister of Basic Education, Mrs Angie Motshekga, will address the learners and educators on that evening as well as preside over the prize giving ceremony.

1. How the National Competition is run

As indicated, adjudication will be over two days, Friday (07 October 2011) through Saturday (08 October 2011). Sunday 09 October 2011 will be departure.

Learners will be divided into five groups, with three adjudicators for each.

- Ten minutes will be allocated for learner's presentation
- Learners could use audio-visual equipment or give an oral presentation
- There will be time allowed for adjudicators to ask questions
- Portfolios will be submitted on registration

A similar format has been arranged for educators, who will meet as a separate group, with their own panel of adjudicators.

2. Overview

It is very gratifying to see the competition maturing and the value and meaning of Oral History becoming more deeply appreciated by everyone who is involved in the project.

- Very high standard for all; winners demonstrated commitment and dedication to teaching and promoting history in schools; produced excellent PFOs, both excellent PFOs and presentation, excellent grasp of OH and its methodology
- Student work demonstrated building of trust and bond between educators and students' to build their confidence to undertake complex tasks – research, writing, presentation – basic skills for all subjects
- Many come from rural communities, many with very little communication facilities, but able to produce excellent students, chosen by provinces
- The idea is to ask that the learners should be required to state what they feel they have personally gained from doing the project. Their responses are very inspiring and worthwhile.
 - They could see how the skills from an oral history project could be applied to many other study and life activities; self confidence, planning skills, interviewing skills, etc.
 - Many were deeply moved by the insight that Oral History really does give a voice to the voiceless and can tell important stories that otherwise might get lost or never be acknowledged
 - Several said that this project has helped them decide on career paths
 - ALL show tremendous passion and enthusiasm that comes with making a precious discovery
 - They articulate very clearly how important it is for their young generation to understand more fully what the older generations went through to bring the nation to where it is today. The competition

provides an invaluable link between South Africa's particular past and its present.

- The Department of Basic Education is witnessing the growing interest in Oral History:
 - Several Provinces are now running their own training programmes for educators, raising the quality of work in noticeable ways;
 - Some of the educators are by now becoming experts in their own rights, assisting others by facilitating workshops and giving advice;
 - Schools are beginning to build their own libraries and archives, taking pride in what they have achieved and making it available to the wider community.

- This Oral History competition appears to be attracting more learners into doing history as an option. We have reports that in some rural areas, especially, the numbers of learners enrolled in history have doubled since the competition was first introduced, and in one case we are told they have trebled!

- Last two winners have gone on to do diploma in Heritage Studies – so has roll-on effect

- Could see significance of the project beyond the school, develop strategies to deal with these; relationship to local community, potential for building better relationships between learners and community members

- In Western Cape schools projects have been integrated into Tourism networks. Now done on a local basis; also some evidence that Municipalities are taking note and taking interest. So impact is spreading.

All of these things are important indicators of the very important impact this programme is making on the nation.

APPENDIX A
PROJECT PLANNING WORK SHEET

PROJECT NAME:

1. What are the goals of our project?
2. What is (are) the topic(s) of our project?
3. What do we want to do with the information gathered?
4. What types of interviews will best suit our purposes?
5. Who will we interview?
6. Who will conduct the interviews? If we use volunteers, who will train them and when?
7. What is the time frame for the completion of the project?
8. When will we start recording? At what rate can we expect to record interviews?
9. What kind of access will we provide? (Indexes, transcripts, summaries)
10. Who will do the work of providing access? Who will set the priorities for processing?
11. Who will store the tapes?
12. What is the budget for the project?
13. What are the potential funding/resource sources?
14. Who can we contact for additional resources or assistance? What other community groups should we include in the project?
15. What are our plans for publicity?

BIBLIOGRAPHY

A Field Notebook for Oral History (Idaho Oral History Center, 1993)

Bonner, P. et al Oral History: A Guide for Educators, (Wits History Workshop, Johannesburg, 2004)

Department of Education Oral History Roundtable for Gauteng, (29-30 August 2005)

Doing Oral History (Ritchie, Donald. Twayne Publishers, New York. 1995)

Introduction to Oral History interviewing, Montana Historical Society, Oral History Program Pamphlet #1.

Ministry of Education *Report of the History & Archaeology Panel* to the Minister of Education, (update 2002)

Moyer, J. Step –by-Step Guide to Oral History [http://do history.org/on_your _own/toolkit/oralHistory.html](http://do.history.org/on_your_own/toolkit/oralHistory.html) 1999

Robben Island Museum, Reading the Transcript: Preserving and Analysing the Recorded Voice, 2nd Annual Oral History Colloquium, Robben Island Museum, (Cape Town, 5 April 2008)

Tosh, J. The Pursuit of History –Aims, Methods & New Directions in the Study of History 2nd edition (Longman, New York and UK, 1991).