Oral History — Interview & Participation Choices

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A standalone educational working guide for general US readers. Examples are fictional unless explicitly described as source references. Use the guide for one manageable task and keep its supporting records with it.

Print and write by hand, or use the editable Word file. The PDFs are not fillable. Use aliases and private record locations; omit passwords, access codes and full identification/account numbers. Label continuation pages with the sheet code, question and date.

Reader, physical-print, native Word and assistive-technology acceptance remain open. PDFs are untagged; no PDF/UA compliance, professional signoff, or tested classroom outcome is claimed. Try a sample page before a full print run.

Participation choices are discussion records, not a legal release or blanket publication permission. Any proposed public/commercial use requires its own rights and privacy review.

Before the conversation: explain the project

“I am gathering memories about _____. I would like to ask about _____ for approximately _____. You can decline a question, pause, or stop. We can use handwritten notes, a recording if you agree, or no retained record. Before we begin, I would like to discuss who may see or hear the result.”

Use this as a draft script, not a legal release. Speak naturally and give the participant time to ask questions. An invitation should make the proposed use understandable rather than burying it in a long form.

The choices card

Ask separately about participation, notes, audio, video, quotation, review, and audience. A person may choose handwritten notes and decline recording. They may agree to family sharing while declining public use. Write the limits plainly and keep them attached to the record.

When a requested choice cannot be supported by your process, explain that before collecting the material. Do not promise an unlimited ability to retrieve copies from people after public distribution. Any later expansion of use should receive its own review and appropriate permission.

The opening-question card

Choose an invitation rather than a leading statement. “What do you remember about your first week there?” allows a range of memories. “Was that the week everything improved?” supplies an interpretation the participant may not share.

Useful follow-ups include: “What happened next?” “Were you there, or did someone tell you about it?” “Which detail are you most certain about?” and “Is there a part you would rather leave out?” Do not use the questions as an interrogation. Let the participant's comfort and the agreed purpose shape the pace.

The clarification card

When a date or name matters, ask how the participant connects it to the event. They may remember a season, another family event, or a document. Record that connection without forcing an exact year.

If two accounts differ, do not ask the participant to settle the disagreement merely because they are available. Record their account and its basis. The research process can compare it with other sources later.

The closing card

“Let me check that I understood one important point: _____. Is that accurate? Is there anything you would like removed, corrected, or kept within a smaller audience? Our agreed next step is _____.”

Do not treat a friendly closing as approval of a finished publication the participant has not seen. Follow the review arrangement actually agreed upon. Record any new limit before editing or sharing the material.

Worked case: Rosa keeps a narrow audience

Rosa agrees to handwritten notes about the fictional move and asks to review them before Sam shares them with Elena's adult children. Sam does not record audio. After the conversation, Sam labels the notes as a summary, preserves Rosa's uncertainty about the year, and keeps the audience restriction with the file.

A later request to use the material in a public workshop is not covered by that limited agreement. The draft records it as a new permission question rather than silently reusing the notes.

The storage-and-review card

Record the interview reference, date, participant's attribution choice, agreed audience, and location of the choices record. Keep original notes or recordings distinct from edited excerpts. A clear filename helps locate a file, but the permission and context record explains how it may be used.

This pack is complete as a conversation aid only after readers can understand the choices without coaching. Publication permissions, privacy, and any legal-release language require separate review.

Use the sheets for one complete cycle

Begin with one bounded question or task. Read the fictional example before entering your own information. Use the first sheet to record the current situation and its evidence, then use the second to check the follow-up. If the answer is unknown, keep it unknown and name the next source or action.

Give every supporting record a stable reference. Keep an earlier observation when later information changes it; add the new date and explanation. A request, a planned action and a confirmed outcome are different states. Close the cycle only as far as the evidence allows.

Try the handoff with the fictional case first: another reader should be able to identify the question, the supporting record and the unfinished step. Record any instruction they cannot follow without explanation. This exercise improves the guide; it does not certify the broader product or process.

ORH-01 — Participation choices and review

Short notes are enough. Use a labeled continuation for longer answers; keep supporting records in their private location.

Project, interview alias, date and preferred attribution

Participation agreed or declined; topics to avoid

Notes choice; audio choice; video choice — record separately

Quotation choice and exact intended audience/use

Review process and limits explained before collecting

Uses not agreed; unanswered questions

Later change or restriction, date and affected record

ORH-02 — Conversation and excerpt handoff

Short notes are enough. Use a labeled continuation for longer answers; keep supporting records in their private location.

One open question and neutral clarification

Participant's wording; summary versus quotation

Uncertainty preserved

Record ID and choices-record location

Review outcome and requested restriction

Audience/use for this excerpt and unresolved permission

Sources and keeping useful records

Editorial basis: the existing DTP writing collection, expanded into standalone guide and worksheet pages. Original fictional examples remain labeled; no external source endorses them.

This guide uses original organizing and teaching material. It supplies no jurisdiction-specific deadlines, legal permission, professional finding or institutional curriculum alignment.

Keep one current master record. Preserve meaningful revisions and carry open questions forward. Related editions and updates: davidtompublishing.com/books-and-publications/.