

## Creating an Oral History Kit - Tip Sheet

Here are tips and information to consider when thinking about creating oral history recording kits to be shared/circulated within your community.

### 1. Getting Started: Some questions to consider

- Who will use the kits and how?
  - Are your kits available to anyone who is a member of your community; Library card holders in good standing only; Only people who are working on a sanctioned project?
  - How will you ensure that your intended community can access the kits? Consider questions around accessibility, technology know-how, and language or other potential cultural barriers.
- What paperwork or guidelines will you need?
  - Depending on the purpose of use, you may want to consider including paperwork and guidelines for conducting oral histories. If you are lending your kit out as part of an organized project (as opposed to use by an individual for their own purposes) you will want consistency in legal releases and potentially a list of questions for the project and contact info for whoever is managing the project.
  - You may decide to create a permission form or loan agreement that stipulates the terms and conditions of borrowing the kit.
- What is your budget?
  - Your budget will dictate what type of equipment you can purchase and how many kits you can create.
  - How will you ensure sustainability of the kit? How/when will you re-evaluate the kit contents and make decisions about replacing or upgrading equipment?

### 2. Ask the Experts

We are grateful to the experts who shared their knowledge and experiences with us for this tip sheet. Below are some of their responses to our questions that we hope will help anyone considering putting together an oral history recording kit for their community.

- **How did you decide what equipment to use?\***
  - \*see **Notes on Oral History Kit Equipment** below for more
  - “I worked closely with interns, who did an environmental scan of existing recording tech and comparable projects; they interviewed colleagues at Kentucky Historical Society, Door County Libraries, Princeton U. Library, and Georgia Public Library. The interns then compiled their findings in a report, which we reviewed together, and came up with a list of recommended equipment; we then met with our IT department to talk through our options, and refined the list from there.” - **Dory Klein, Boston Public Library (BPL)**
  - “From our research and these discussions, we decided with our IT department that the Zoom H1N would be best for our kits due to its cost-effectiveness and easy-to-use controls.” - **Sydney Villegas, BPL**
  - “Our kit is a free-circulating, self-service kit, so we needed to balance cost, ease of use and portability. We chose the Zoom H2N because it was a strong compromise on the above criteria, and because its recognizable microphone shape made it more appealing to potential users than

a more complex model.” - **Steven Rice, Door County Historical Museum (DC Historical)**  
“Trial and error; [AskDoug](#) and <https://digitalomnium.com>; Consultation with colleagues at other institutions.” - **Jennifer Snyder, Smithsonian Archives of American Art (AAA)**

- **How do you promote use of the kits? How much use do they typically get?**
  - “We promoted these kits through promotional flyers posted in our libraries, blog post and social media announcements, oral history workshops both at the BPL and with community partners, with our oral history Libguide, and through word of mouth. We fully launched our kits in May of [2023] and currently have 11 kits circulating and they are fairly well used with 3-4 kits usually checked out at a time.” **Sydney Villegas, BPL**
  - “We did a press rollout for the program when it was first launched, and promoted it regularly to interested patrons and through the local historical community network. Circulation varies and is more project based, but the kits have enabled several large-scale oral history projects which might not have happened without the program. Kits used for these projects tend to circulate frequently.” **Steven Rice, DC Historical**
- **What challenges did you or do you encounter at any stage of the process (assembling, loaning/circulating, publicizing, etc.)?**
  - “The overall process took longer than anticipated, in part because we didn't have a lot of staff time/labor to devote to the research and assembly. The translation of materials also took several weeks, and would not have been possible without grant funding (40-page guidebook translated into 10 languages, plus ephemera, cost about \$38k); that being said, this felt necessary, as minimizing barriers to oral history is the driving purpose of this project.” **Dory Klein, BPL**
  - “Some roadblocks we had to overcome in developing our kits were supply chain issues that pushed back the release date of our kits, having to get the language of the instructions and guides that come with our kits right and be concise yet inclusive, and planning for what happens when kits have missing or damaged parts or technology degrades over time.” **Sydney Villegas, BPL**
  - “Patrons who are uncomfortable with technology at a basic level tend to shy away from the kits entirely. We like to encourage use of our kit instructionals and other materials in those cases -- patrons can use whatever recording equipment they're most comfortable with. We emphasize that it is making oral history that matters most, not recording perfection.
  - The H2n is relatively simple but probably too much for most users, and some of its file systems and features are clumsy to work with. It is also an older unit and will probably need to be replaced with more current technology within the next ten years.” **Steven Rice, DC Historical**
  - “1) Wear and tear on equipment/components; 2) not all equipment/components returned; 3) audio recorders will mysteriously not work on-site (were working before sent out)...” **Jennifer Snyder, AAA**
- **What advice would you give to someone developing a circulating kit?**
  - “Give yourself more time than you think you'll need; this took about 2 years from start to finish (that being said, enough libraries have built these kits now that it's not necessary to reinvent the wheel; reuse and repurpose what you can, with credit, to save yourself some dear time and labor). Translation of materials is both important and costly, so it's worth seeking grant funding for this express purpose.” **Dory Klein, BPL**

- “Get lots of feedback throughout the process, don't be afraid to change your ideas/preferences along the way and stay flexible, start small and expand later, provide ways for your patrons to share their feedback, and keep your goals clear and focused.” **Sydney Villegas, BPL**
- “Work with your circulation staff from the beginning. The technical side of circulation -- labeling the many parts, creating a kit robust enough to travel between libraries, and figuring out the cataloging and fines -- were fussier than we initially expected. These are complex items and are challenging even if you have an established library of things program.
- Be prepared to meet users where they are. Not everyone has the same vision of what oral history is or what they're comfortable doing, and that's okay. We provide a resource with very few strings attached, and that's worked well for us so far. Remember that this field is dominated by academics and that your audience may need a very different approach. Write, design and communicate with the lay public in mind unless you are targeting a more specialized cohort. Use your project as a way to build relationships with the local history community. They will be interested in getting donated recordings and doing projects in their own right, and your program will be a great way to do that without having to build their own capacity with limited resources.

Have a professional oral historian review your kit and materials if possible. The expert advice we received from the University of Wisconsin Madison's Oral Historian was key to giving our kits that final polish. Plus, he ended up using our materials for his program, so it was a fantastic relationship building moment.

Be prepared for many, many requests to interview people yourself. If you choose to do so, be strategic and only take on what you can handle. It is okay to offer resources without becoming the resource. Remember that oral history is emotionally and mentally taxing, time consuming, and highly personal, so know what you're getting into." **Steven Rice, DC Historical**

- “1) Develop instructions before you send it out on the first run. 2) Then update your instructions as needed. Be aware you will be on call at ANY TIME an interview is being conducted to troubleshoot equipment (nights and weekends). 3) Don't be tied to the equipment--if set-up is going poorly and it's becoming a stress point, abandon it and let them use what they're comfortable with. Standards are good; the interview is more important.” **Jennifer Snyder, AAA**

#### ● Final Thoughts?

- “Push through the challenges and create this resource. There is an untapped need in your community whether you realize it or not. Oral history is an incredibly enriching and beautiful thing, which builds powerful bonds between people and the place they live. Libraries are a natural fit for that work.” **Steven Rice, DC Historical**

### 3. Oral History Kit Equipment

In addition to the suggestions and pointers from the experts above, here are some resources to consult when trying to decide what equipment to purchase.

- [Transom.org Tools page](#)
- [The Sustainable Heritage Network's Basic Oral History Recording Kit: Equipment Purchasing Guide](#)
- [UNC - Chapel Hill's Introduction to the Oral History and Archives Kit](#) - this resource contains information about equipment AND other content you might want to include in your kits.

Also, keep in mind that many people may be interested in using their phones as recording devices! Check out this resource from Vermont Folklife for tips on recording with a smartphone (and other advice): [Recording Interviews & Sounds In Person, from Vermont Folklife](#)

### 4. General Resources about Technology and Equipment

Please note that these are general resources and don't necessarily pertain to oral history recording equipment or kits.

- [Technology Planning - WebJunction](#)
- [Tools & Technology - The Sustainable Heritage Network](#)

### 5. Examples of circulating kits:

- [Boston Public Library](#)
- [Door County Public Library: Door County Speaks](#) and [Door County Speaks Field Guide](#)
- [Kentucky Oral History Commission](#)
- [Archivist in a Backpack](#)