

CDSS Archiving Toolkit

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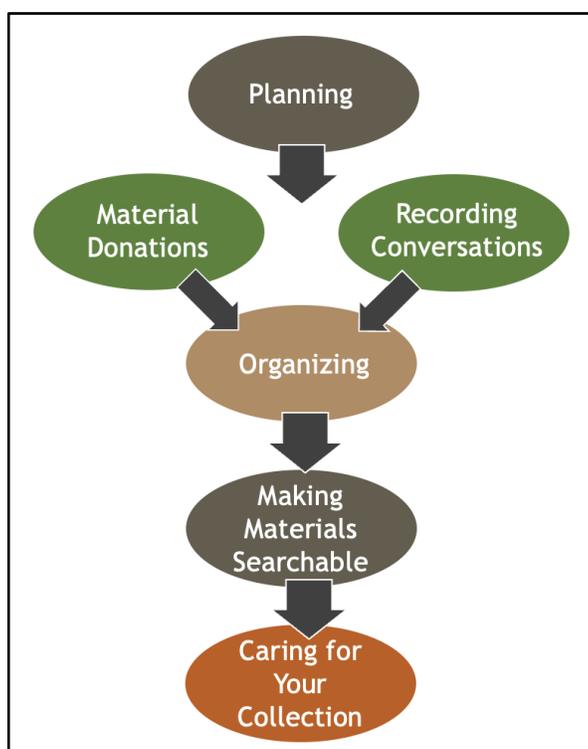
Chapter 3.1 Video Transcript

Intro:

RECORDING CONVERSATIONS

Welcome to Chapter Three: Recording Conversations

After our initial discussion of your planning questions, we launched into setting up your process for receiving donations. Now, before we go any further, we want to pay attention to a special kind of donation to your archival collection: recorded conversations with people in your community.



In the Introduction for the previous chapter, we laid out three situations in which you may find yourself:

- 1) You've got the material you need or want already, and you're not actively seeking any more material for this collection; or
- 2) You've got *some* material, but you want to seek out additional material to add to it; or
- 3) You're starting from scratch in seeking out and collecting material for your collection.

If you're in the first category, and you're really not going to be looking for or accepting any new material, you may not want to record any conversations or capture any personal stories either.

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If so, you can move on to Chapter 4. However, if you are in either of the latter two situations, we think you'll find this chapter useful.

In this chapter, there are two videos for you to work your way through: the first video—***What You Need to Know: Recording Conversations***—provides some important background information and will set you up to successfully record some wonderful conversations with members of your community. We recommend you watch this video first to inform your viewing of the second video.

The other video—***Using the Spreadsheet***—will walk you through all the steps of recording a conversation successfully and getting a signed release form. We'll continue in a different tab of the same spreadsheet tool we introduced in the last chapter.

And look for the Chapter 3 Resources PDF that provides transcripts of each of the videos as well as summaries of key information from these videos.

So, let's begin!

Chapter 3.2 Video Transcript

What You Need to Know: RECORDING CONVERSATIONS

In this video, we'll be going over some important information that we'd like to share with you about the process of recording conversations with members of your community.

These conversations can take shape in several different ways.

For example, you might choose to do a more typical interview with two people, one of whom is asking questions of the other. This can be a great format when you are speaking with someone from whom you want to learn about a particular part of your organization's history.

As an example, we've provided an excerpt from an interview we did with Paul Eric Smith. What we're hoping to illustrate is the way that the interview is initially structured around some questions, but that it feels more like a conversation between the three of us. Here, he's talking about one of his jobs at the festival: playing the bass drum in the opening processional each year.

Audio clip plays:

Pat: The role of the bass drum in relationship to the processional is sort of like traffic control or what?

Paul: Yeah, I--yeah, particularly going down that hill there is an attempt to—and sort of the musicians here too—everything kind of wants to speed up and you also need to communicate from the front to the back what's going on. And I've often had the experience of only being able to hear the bass drum, not really being able to hear the music at all if I'm at the back of the line. I've also got in the habit of making sure there was a good distance between me and all of the other musicians [laughing] because they hated...

Pat: They hated the bass drum?

Paul: Yeah. And you get in the habit of saying, "okay, I've got to start, you know, fair warning! I'm going to start up the bass drum!" because it surprises the hell out of people if they're not expecting it.

Susan: And you were not a tentative bass drum player either! You gave it the oomph it needed.

Paul: Yeah, again. I have no idea where it comes from. (Laughing)

Susan: It was perfect. It was what we needed

So, an interview is one kind of conversation. Alternatively, you might want to record a conversation between several people in which the conversation is more free flowing. For example, let's say you brought together two older members of your dance group and asked

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them to talk about the question: “Why does this group mean so much to you?” or “What do you want younger members to understand about this organization as they take over its administration?” They decide to meet at a local café and talk about the questions together while they have their phone record the conversation.

Or you might want to ask someone to sit down at home by themselves and audio-record their memories of a particular event. For instance, an older member of the organization wants to share their recollections of an important event, so they make themselves a written list of talking points to help remind them of things they want to mention. Then they record themselves telling the story of that event from their memory.

Any of these scenarios could produce some really valuable audio or video recordings to help capture your organization’s history.

There are five parts to this process that we’d like to talk about:

1. Preparing for the recording session
2. Making the recording
3. Gathering permission from those in the recording
4. Properly storing your recording digitally
5. Creating a transcript

And all of this information is summarized in the PDF for this chapter.

So, let’s start with Part 1: Preparing for the Recording Sessions.

PREPARING FOR THE RECORDING SESSION POINTS

1/ Who Should You Talk to?

There will probably be many candidates you can think of in your community whose voice would be a valuable addition to your archival collection. So, how do you decide? It’s really your decision, but here’s what we did:

IN OUR EXPERIENCE:

While a few of the people we spoke to were volunteers, for the most part, we found we had to seek out people to talk with us, mostly because people often didn’t feel that what they had to say was “archive-worthy.” We began by consulting with others in our community to gather a list of people who had some important part of the story to tell about the history of our event. We then contacted those people, invited them to talk with us, and explained how the process would work. Many of them were willing and interested, and we recorded some incredible conversations and stories.

2/ What can you do to put people at ease?

Some people will be nervous about recording a conversation, even when they're willing to do it. So, giving them a sense of what you're planning to talk about can help them know what to expect, even if you don't end up strictly following your outline. We recommend you create your *own* list of questions or talking points for each person, tailored to their situation, and share it with them ahead of time. Here's what we did:

- We sent a list of questions ahead of time, so that people could have a preview of what we might be asking.
- We always began with very easy questions for them to talk about, such as:
 - How did you first get involved in this this type of folk music?
 - Did you have any experience with music or dance while you were growing up? Where did you grow up?
 - How did you first find out about this organization?

This got people talking easily about something they knew well, and it provided context for their later comments about their experiences.

- We let them know that they could control the content. While we had a list of questions, they could also talk about whatever they wanted to, in relation to our event. And they could skip any question we asked that they did not want to talk about.
- We let them know that the recording could be edited when it was done, so nothing they would say would be irrevocable. They would have an opportunity to listen or to watch the recording, or read a transcript, and delete anything that they wanted to.
- In addition, they would have final say on what was included in the final version of their recording. This was very important to tell people, to reassure them that *they* could determine how *their* voice was represented in the collection.
- And we wouldn't finalize the recording for the collection until we knew that they were happy with the content. At that point, we would ask them to sign a release form that would grant us permission to make the recording publicly available in our archival collection.

After spelling out this process, everyone we invited was happy to participate. We would then schedule a time to talk either in-person or remotely on computer. In our experience, both worked equally well; it's just a matter of what you and the other person are comfortable with.

3/ Make Some Decisions about How to Conduct Your Recorded Conversations

What kind of a conversation do you want to record? We mentioned three different possibilities: a formal interview, a more free-flowing conversation or someone simply recording themselves. And what about gathering a group of people and having them talk together about your organization's history, or a particular event? After all, it's easier for many folks to talk as part of a group rather than to feel singled out, especially if they're being recorded, and the conversation may flow more easily. This can be a tempting scenario to set up, but we'd like to add a word of caution. When recording a group talking together, it's often hard to get good audio on everyone, and when talking over each other, the resulting recording can come out rather garbled and hard to understand. And it will be a nightmare to try to transcribe for anyone who needs that as an aid for listening to the recording. We don't recommend it, unless you can structure a way for people to take turns talking one at a time.

Next, do you want to create the recording virtually or in person? There are several factors that may influence your choice:

- **Proximity:** If the person you're speaking with lives at a distance, then you may have no choice but to talk virtually using one of currently available tools, like Zoom, or GoogleMeet. But if you can meet in person, there are some lovely advantages to doing so. We found that being in the room with the person gave the experience a personal touch that, in many cases, helped conversation flow more easily. But in the end, both in-person and virtual conversations will give you a good result to include in your collection.
- **The Person's Level of Comfort with Technology:** If you want to conduct a virtual conversation with someone for whom this is relatively unfamiliar, just make sure you talk to them ahead of time about how it will work, and what they can expect on their end. Do what you can to make the experience as un-intimidating as possible.

Next, you'll want to decide whether to record **audio-only or video**. It can be a little daunting for some people to be the focus of a conversation, and to be asked to talk about themselves. Particularly for those folks, we found that when they were too aware that they were being videoed (such having a video camera or phone pointed at them or seeing themselves on the computer screen in a Zoom conversations), they became more self-conscious and that could sometimes get in the way of a smooth conversation. So, in some cases, you may want to opt for an audio-only recorded conversation. If you're doing it in person, it's easy to place a phone down on a table in front of you, so that everyone soon forgets that it's there and is recording. If you're having a virtual conversation, the sense of being "videoed" is less obvious and may not be as intrusive as using a video camera or phone to video the conversation.

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In any case, you'll want to end up with a high-quality audio recording, whether or not there is video to accompany it. Many phones today have fairly good microphones and may be perfectly sufficient for recording. In our experience, we chose to purchase a high-quality microphone (we have a Blue Yeti microphone) and used that in our in-person conversations. We found that, at the start, some people were a little daunted by a larger microphone sitting on the table between us, but once we started talking, the presence of the microphone did not seem to be an issue.

Finally, **do you want to use the StoryCorps app?**: Some people are familiar with StoryCorps, an organization that has been collecting recorded conversations between everyday people since 2003. While we try not to recommend one particular tech tool over another, in this case, StoryCorps has created an app to do *precisely* what we're talking about in this chapter -- to record conversations between people, to be archived, so we want to mention it. It makes some things very easy to do, but there are trade-offs to be weighed against that ease. The app makes it easy to record right from your phone, and to save and store the recording -- in fact, everything recorded on StoryCorps is archived in the US Library of Congress, so your archiving needs are definitely taken care of. If you'd like to learn more about StoryCorps, we've provided some useful links in the Resources PDF. However, once the recordings are made, they are part of a vast database of conversations, making access sometimes a little tricky. You can set up a Community Page on which to store all your conversations, but there are additional steps to doing so, and to giving people access to that page. The conversations are limited to no more than 45 minutes per conversation, though you are welcome to make multiple recordings with a Part 1, a Part 2 and so on. So worth consideration, but with some trade-offs to think about.

As an alternative to the StoryCorps app, you can use your phone to record a conversation fairly easily. You then have the audio or video files and can set up your own online access to those files through YouTube, Vimeo or our own website.

4/ Consider a Practice Run!

You may want to consider a practice run with recording a conversation. If so, then grab someone else from your organization and try doing a practice recording! It will give you a chance to practice your introduction, to make sure you're familiar with your recording equipment, and to work out any kinks in your process. You'll get a firsthand sense of what it's like to be recorded, and if you need to or want to re-record something that doesn't come out quite the way you intended, you can do so easily.

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MAKING THE RECORDING

So, once you've got someone lined up, you're ready to record the conversation. Here are some tips on how to do that:

- **Before you begin recording, remind your person of the guidelines for the conversation:** Your person may be a little nervous about the conversation, particularly about whether they'll trip over their own words. At the start of the recording, you can put them at ease by reminding them:
 - they can delete anything that they want from the recording after it's made;
 - they will have final say over what's included in the recording;
 - and that the conversation does not need to strictly stick to any questions you sent ahead of time; they can choose the direction of the conversation.
- **Create a standard introduction that will help listeners:** When starting your recorded conversation, begin with a standard introduction, spoken by you. The introduction should include who is present for the conversation, the date, where the conversation is taking place, and why it's taking place. This provides important information upfront for anyone listening to the recording in the future.

IN OUR EXPERIENCE:

Here's what we used for our standard introduction:

It's [date] and my name is (your name). I'm here in [location] with (other person's name).

Together, we're making recordings for inclusion in the [name of collection] collection that will eventually reside at [where the collection will live].

We're speaking today with (other person's name) who (add something about their significance to your collection—for example, "who has been a long-time member of Team X and one of the longest-serving members of the organizing committee for the Event Y.")

(Speaking to person): [Name], would you say a few words to introduce yourself and tell us a little bit about your connection to [this event]?"

The text for this introduction in the PDF for Chapter 3.

- **Begin the conversation with something that's easy for them to talk about:** Start with a really easy question, as we mentioned earlier. In our case, we always began

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with: how did you get involved in folk dancing or folk music? *Everyone* we spoke to had something to say about that.

- **Make it clear when the conversation is done:** When you feel it's time to wrap things up, simply thank the person for taking the time to share their experience with you. It's an easy signal to them and to future listeners of the recording that you're concluding the conversation. This is an example of the kind of things we would say:

Well, [Name] thank you so much for talking with us today.

It's been really interesting to hear about your history with the Ale, and I've really appreciated this opportunity to capture your experiences in your own words.

Our next steps now.....

and we would then tell her what those were.

- **Consider including a visual image of the person with the recording:** While it's not necessary, it's nice to have a visual image of the person you spoke with, as part of the archival record. With an in-person conversation, you can take a photo of the person. With an online conversation, you can pull a visual from the video file if there is one or ask the person to send you a digital photo of themselves.

CREATING A TRANSCRIPT

Another really important part of archiving a recording is making sure your recordings are accessible to all users, including those with hearing difficulties. You can do this either by captioning your video or creating a transcript. We're in favor of creating transcripts, not only because they support accessibility, but because they are a great tool to have for someone who wants to quickly get a sense of what was talked about in the conversation or someone who wants to search the recording quickly using keywords.

Creating transcripts is definitely a time-consuming process. With various online or AI-based transcription tools, it's much easier than it used to be. However, even then, it's important to read back through the transcript and make corrections, and in our experience, this always took longer than we thought it was going to. (On the positive side: this can make a great task for willing volunteers and does not need to be completed now before you move on to other steps; you can come back to creating transcripts at a later time.)

IN OUR EXPERIENCE:

There were many good options for transcription software available online (in our case, we used both Trint and TurboScribe). Both allowed us to download an audio file and create an initial draft of the transcript for us from that audio file. We then would listen to the recording, and edit any mistakes, fix punctuation and spelling, and make sure the correct speaker was listed throughout the recording.

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GATHERING PERMISSION FROM THOSE IN THE RECORDING

Another part of this process has to do with gathering permission from everyone in the recording.

In this chapter, we've provided a copy of the release form that we used. You are welcome to use this version, or to revise it for your own purposes. It's very similar to the gift agreement that we talked about in the previous chapter, in that it is granting permission for you to make this donation publicly available in your collection, but there are some differences in the wording.

The top portion of the release form, entitled "Permission and Consent", spells out for the person why the conversation is being recorded, and what files will result from the recording. It also spells out the permission that you are seeking.

The next section, "Consent and Release", is where the person checks off three statements to show that they understand the conditions of the recording. They then print, sign and date the release and provide their preferred contact information, should you have any follow-up questions later.

You can decide to provide paper release forms if you are conducting in-person conversations or you may want to create your release form electronically using one of many available pieces of software that allow people to sign forms electronically.

Once you've received the signed release form, then file it electronically and (if you're like us) you may want to create and file a paper copy as well. As a reminder, we recommend back-up copies in three places: a local computer, a separate hard drive and somewhere online / in the Cloud. And we added a physical copy, filed.

There's one thing to note about the timing of signing a release:

Once the conversation is concluded, it's a good idea to check in with the person to see whether they're satisfied with what they said. If they *are* satisfied, you can ask them to sign the release form at that time.

But in other cases, some people prefer to review the recording once more before signing a release. In that case, you can either provide a copy of the audio or video file for them to listen to or provide the transcript for them. However, sharing a transcript sometimes presents some of its own challenges.

IN OUR EXPERIENCE:

Some people we spoke with wanted to review what they had said, so we sent them the transcript. However, reading a transcript of your own speech is sometimes off-putting. Regular speech is full of starts and stops, or partial sentences or, you know, little speech

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mannerisms like saying "You know." So, when people were given transcripts and read their own speech—rather than listening to it—they were sometimes a bit upset at how they thought they sounded, and they wanted to rewrite the transcript. We had to explain to them that the transcript needs to exactly match what was said in the recording; that's its purpose. As time went on, we got better at explaining that we could delete anything that they did not want to include, but once the recording was done, we couldn't rephrase in the transcript how things were said.

If people were concerned that they had misspoken, we let them create a type of "errata sheet" or some accompanying notes to the conversation, where they could correct anything that they felt they needed to. Some chose to do this, while others chose to just delete any mistaken information. In a few cases, when we made the transcription, we added some additional clarification in brackets to show that it was an addition to the transcript.

So the upshot of all this is: Help your participants in the conversation understand that they can certainly restate anything they want during the recording, but that after the recording is completed, the only real edits you can make are to delete any parts that they would like to remove from the final public copy of the recording. They don't need to sign a release until they're happy with the final version.

PROPERLY STORING YOUR RECORDING

Another important part of this process is properly storing your recording digitally. Your recordings are a unique and valuable item; they are truly one of a kind! Therefore, it's really important to make sure you store them digitally in a way that protects them. You can use whatever organization system works best for you for storing your files, but in the end, your goal is to preserve the original digital files as a MASTER copy in the highest quality format you can, and create a copy of that file as an ACCESS copy, which users of your archive will open and view or listen to. This access copy is often a smaller, lower quality file that is still good enough for viewing or listening purposes. And you can find a summary of this information in the Resources PDF for this chapter.

There are three important reasons to create both a MASTER copy and an ACCESS copy:

Reason #1: Size! Master copies can be big and take up lots of space.

File formats that have the least file compression—or better yet, none at all—are favored for archival collections. Why? These kinds of files—such as .wav, .tiff or PDF files—preserve the best quality version of your file, with many little bits of data making up the file. In audio files, the sound quality is better. In image files, the resolution and detail is much better. There is also little risk of losing any of that data that makes up the file if you have to edit it.

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So, these file formats are the best formats to use for keeping a MASTER copy of a digital file. You can see a chart in the PDF that summarizes which file formats work best for different files.

However, since the uncompressed files include lots of little bits of data to make up the file, they tend to be big files and require lots of storage space on a computer or a server.

Using files with some compression—such as .mp3 files or .jpeg files—result in a file that is smaller because it doesn't use as much data to make up the file. In audio files, the sound is not as good as in your Master copy, but often good enough for everyday use. In image files, the picture is perhaps not as sharp and clear or detailed as in your Master copy, but again, it is often good enough for everyday use. The smaller files don't require as much computer or server space to store and are referred to as ACCESS copies.

Reason #2: Ease of use. Access copies provide files that are more manageable to use.

Master copies are often large files and therefore can take a long time to load on a website, or to download. The smaller Access copy will load more quickly onto websites or will be quicker to download.

Reason #3: Preservation.

Master files are sometimes also referred to as “preservation copies.” If anything happens to your access files (say they get lost, corrupted, or accidentally deleted), you can always make a new Access copy from your Master or preservation copy.

The Master copy remains largely untouched archivally, unless you need to make additional copies from it.

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With that, we're shared with you the sum-total of our wisdom about creating recorded conversations. Now you're ready to move on to our next video: Using the Spreadsheet.

Chapter 3.3 Video Transcript USING THE SPREADSHEET

If you've determined that you want to include recorded conversations with members of your community in your collection, then this video will guide you through the steps of doing so. We've outlined those steps in the next part of the spreadsheet. (If you haven't already watched the video "What You Need to Know: Recording Conversations", please watch that first before watching this video.)

You are certainly welcome to revise Tab 2 of the spreadsheet to meet your needs. If any of the columns feel unnecessary to you, you're welcome to skip them. We designed this tab of the spreadsheet based on our experience conducting interviews. While some of the steps may seem a little too granular, and sometimes even obvious, we ended up with this level of detail because of the volume of interviews we were conducting. We ended up with a total of almost 30 interviews, and at any one time, we were juggling at least 4-6 of them were in some stage of this process. We found that we needed this level of granularity to track exactly which interviews were in what part of the process. We'll go through all the steps described here, then you can tailor this to a version that feels most useful to you.

Go into the spreadsheet and look along the bottom for Tab 2: Recording Conversations. As you scroll across Columns A - T, you'll see the five parts to this process that are marked in different colors at the top of the columns:

- 1) Making the recording
- 2) Gathering permissions from those involved
- 3) Storing your recording
- 4) Creating a transcript
- 5) Creating appropriate back-up files to protect your recording

Columns A and B are fairly straightforward; you're simply going to enter the names of the people participating in the conversation and the date of the conversation.

Columns C - G are the steps involved in creating the recording. **Column C** is a reminder to you to make sure that people have received all the information we outlined in the previous video. Once you've made the recording, check off **Column D**.

Column E is a reminder to send a thank you to those involved, and—if you have not already done so—confirm whether or not they would like to review the recording before it's finalized.

If they are reviewing the recording, let them know what the next steps are:

- They can review either the recording itself or a written transcript;

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- If there are things they said that they wish to delete, you can make those changes to the recording;
- If there is any information they wish to add or expand on, you can create accompanying notes that live with the recording;
- They'll then sign a release form to make the recording publicly available.

If they choose to review the recording, then **Column F** is simply intended as your way to keep track of the fact that you've sent them what they need to review the recording. If they feel no need to review the recording, you can skip this column.

Column G is similarly only applicable if they've chosen to review the recording and have any changes they want to make. This column helps you keep track of whether you have completed those revisions yet. If it doesn't apply, you can skip it.

Columns H - K are about gathering permissions for your use of the recording and helps you track where you are in this part of the process. When you send out the release form, check off **Column H**; when you receive it back, check off **Column I**. **Column J** is a reminder to file your very important signed releases where you can find them, and—if, like us, you want paper copies as well—check off **Column K**.

Columns L - N help you keep track of the various digital copies of the recording that you need to save, and where to save them. We chose to create a digital folder for each recording. Then within that folder, we created a subfolder for Master Files, for Access Copies, and for the Transcript. Sometimes we also had other documents, such as any photos of the people involved or any documents they gave us, and we just stored those in the folder. Once you've done so, check off **Columns L, M, and N**.

Columns O, P and Q help you keep track of the steps in creating a transcript for the recording. They prompt you to: create the draft of the transcript, either using transcription software or by hand; finalize the transcript edits and create a final PDF version; and to file the transcript in the folder for that recording.

Columns R, S and T serve as a reminder to make three essential back-up copies of your recording. Store one on a local computer, one on a back-up hard drive, and one online.

And that's the process from start to finish of conducting and archivally preparing your valuable recorded conversations.

You're now ready to go on to Chapter 4 and start with the introduction.

Chapter 3.2 Summary

What You Need to Know:

RECORDING CONVERSATIONS

Ways You Might Structure the Conversations

- Typical Interview Format: two people, one of whom is asking questions of the other
- Free Flowing Conversation: two people are talking about a particular topic -- you may or may not be there to help with recording it
- Someone Records Themselves

5 Parts to the Recording Process

1. Preparing for the recording session
2. Making the recording
3. Gathering permission from those in the recording
4. Properly storing your recording digitally
5. Creating a transcript

PREPARING FOR THE RECORDING SESSION

1/ Who Should You Talk to?

- Volunteers vs. people you seek out? You can do either or both. We found we did both, but had to lean more heavily on seeking people out.

2/ How can you put people at ease about the process?

- Send a list of questions ahead of time, so that people will have a preview of what you might be asking them to talk about.
- Begin with very easy questions for people to talk about, such as:
 - How did you first get involved in this [this type of folk music]?
 - Did you have any experience with music or dance while you were growing up?
Where did you grow up?
 - How did you first find out about [this organization]?
- Remind them that they control the content. Although there is a list of questions, they can talk about whatever they want to, in relation to your event. And they can skip any question that they do not want to talk about.
- Remind them that the recording can be edited when it is done, so nothing they say will be irrevocable. They will have an opportunity to listen to or watch the recording, or read a transcript, and delete anything that they wish.

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- In addition, they will have final say on what is included in the final version of their recording.
- Remind them that you will not finalize the recording for the collection until they are happy with the content.

3/ Make Some Decisions about How to Conduct Your Recorded Conversations

- What kind of a conversation do you want to record? (Interview / Conversation / Person Records Themselves)
 - We caution against gathering a group and having them all talk together unless you can structure a way for people to take turns talking one at a time.
- Do you want to create the recording virtually or in person? There are several factors that may influence your choice:
 - **Proximity:** If the person you're speaking with lives at a distance, then you may have no choice but to talk virtually using one of currently available tools, like Zoom, or GoogleMeet. But if you can meet in person, there are some lovely advantages to doing so.
 - **The Person's Level of Comfort with Technology:** Do what you can to make the experience as un-intimidating as possible.
- Decide whether to record **audio-only or video**
- **Do you want to use the StoryCorp app?** You can learn more in these links:
 - An Overview of StoryCorp: <https://storycorps.org/>
 - StoryCorp's tips and guidelines for conducting an interview: <https://storycorps.org/participate/what-to-expect/>
 - Getting and using the app: <https://storycorps.org/participate/storycorps-app/>

4/ Consider a Practice Run!

- You may want to grab someone else from your organization and try doing a practice interview! It will give you a chance to practice your introduction, to make sure you're familiar with your recording equipment, and to work out any kinks in your process. You'll get a firsthand sense of what it's like to be recorded, and if you need to or want to re-record something that doesn't come out quite the way you intended, you can do so easily.

MAKING THE RECORDING

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- **Before you begin recording, remind your person of the guidelines for the conversation:** Your person may be a little nervous about the conversation, particularly about whether they'll trip over their own words. At the start, you can put them at ease by reminding them:
 - they can delete anything that they want from the recording after it's made;
 - they will have final say over what's included in the recording;
 - and that the conversation does not need to strictly stick to any questions you sent ahead of time; they can choose the direction of the conversation.
- **Create a standard introduction that will help listeners:** When starting your recorded conversation, begin with a standard introduction, spoken by you. The introduction should include who is present for the conversation, the date, where the conversation is taking place, and why it's taking place. This provides important information upfront for anyone listening to the recording in the future.

Here's our standard introduction as an example:

It's [date] and my name is (your name). I'm here in [location] with (other person's name).

We're speaking today with (other person's name) who (add something about their significance to your collection – for example, “who has been a long-time member of Team X and one of the longest-serving members of the organizing committee for the Event Y.”)

Together, we're making recordings for inclusion in the [name of collection] collection that will eventually reside at [where the collection will live].

(Speaking to person): [Name], would you say a few words to introduce yourself and tell us a little bit about your connection to [this event]?”

- **Begin the conversation with something that's easy for them to talk about.**
- **Make it clear when the conversation is done:** When you feel it's time to wrap things up, simply thank the person for taking the time to share their experience with you.
- **Consider including a visual image of the person with the recording.**

CREATING A TRANSCRIPT

- Either consider captioning any video conversations or creating a transcript for both audio and video conversations.

GATHERING PERMISSION FROM THOSE IN THE RECORDING

CDSS ARCHIVING TOOLKIT

- Consider having people sign a release form. We've provided a sample copy in this document.
- You can decide to provide paper release forms (if you are conducting in-person conversations) or you may want to create your release form electronically using one of many available pieces of software that allow people to sign forms electronically.
- Once the conversation is concluded, check in with the person to see whether they're satisfied with what they said. If they're satisfied, you can ask them to sign the release form at that time. But in other cases, some people prefer to review the recording once more before signing a release. In that case, you can either provide a copy of the audio file for them to listen to or provide the transcript for them.
- The transcript needs to reflect exactly what was said in the recording, so they can't change the way they said something once the recording is complete. They can, however, choose to delete something from a recording, or add additional notes to accompany the recording that provide additional information or corrections to something in the recording.

PROPERLY STORING YOUR RECORDING

- Preserve the original digital files as a MASTER copy in the highest quality format you can and create a copy of that file as an ACCESS copy.
- There are 3 important reasons to create both a MASTER and ACCESS copy:
 - **Size! Master copies can be big and take up lots of space.** File formats that have the least file compression—or better yet, none at all—are favored for archival collections but are large files to store. Compressed files are smaller to store and work quite well as Access copies.
 - **Ease of use. Access copies provide files that are more manageable to use.** Because master copies are often large files, they can take a long time to load on a website, or to download. The smaller Access copy will load more quickly onto websites or will be quicker to download.
 - **Preservation:** Master files are sometimes also referred to as “preservation copies.” If anything happens to your access files (say they get lost, corrupted, or accidentally deleted), you can always make a new Access copy from your Master or preservation copy. The Master copy remains largely untouched archivally, unless you need to make additional copies from it.
- Certain digital file formats are much better for archival preservation than others. If you don't have the preferred format, you can use ACCESS-copy formats for your master.