

UC Berkeley

"Librarians Navigating Change" Oral History Project, UC Berkeley

Title

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ORAL HISTORY METHODOLOGY FOR THE QUALITATIVE RESEARCHER

Ann Glusker, Librarian, UC Berkeley

UC Love Data Week 2025

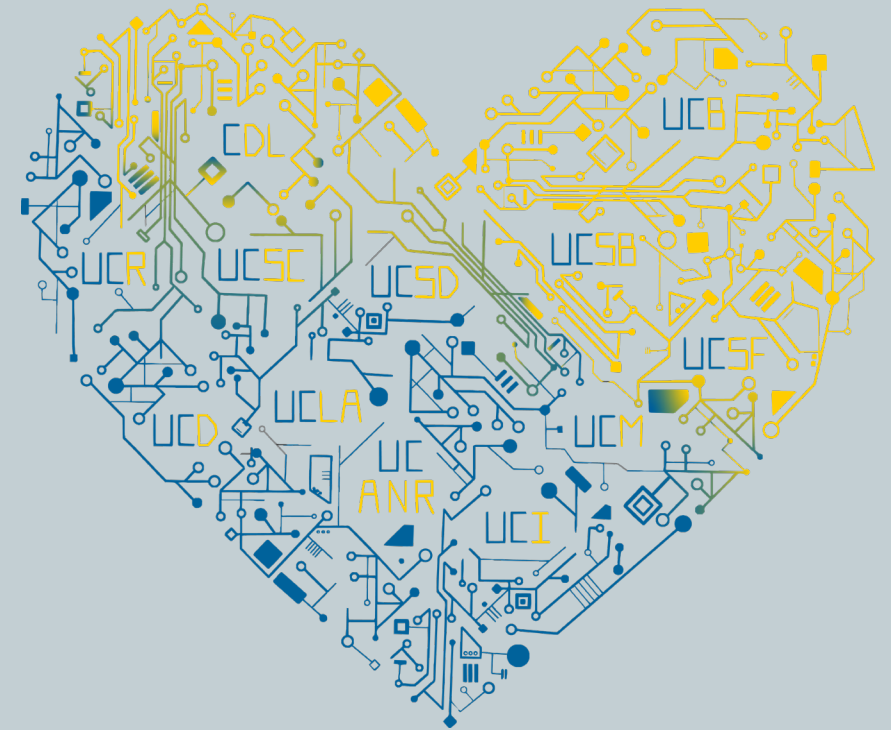
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WELCOME TO UC LOVE DATA WEEK!

HOW DO YOU ❤️ YOUR DATA?

February 10 - 14, 2025

UC Love Data Week is a week-long offering of presentations and workshops focused on data access, management, security, sharing, and preservation. Whether you're working on qualitative or quantitative data, we've got events for you! All members of the University of California community are welcome to attend.



TODAY'S SESSION

- Introduction and today's session
- “A Tale of Two Projects”
- Definitions: what are qualitative methods, and what is oral history?
- Oral history methodology/process overview
- Comparing and contrasting oral history with other qualitative methods (why use oral history methodology)
- Oral history and social justice
- Oral history, human subjects, narrator rights, and preservation
- Using oral history collections
- Oral history resources through the UC
- Further reading

A TALE OF TWO PROJECTS (QDA)

“Viewed as Equals”: The Impacts of Library Organizational Cultures and Management on Library Staff Morale

ABSTRACT

The literature on academic librarian morale is burgeoning, yet less attention has been paid to the workplace experiences of staff. This research team, which included library staff and librarians, conducted 34 structured online interviews with academic library staff across the United States. A theoretical model and interview findings are presented, which reveal the ways in which organizational culture, library hierarchies, and management style affect staff morale. Recommendations are offered, suggesting that, while change can present substantial challenges, efforts to address equity in compensation, provide professional growth opportunities, and create more collegial work environments are essential to improving staff morale.

Qualitative data analysis using grounded theory methodology

MAXQDA, a qualitative data analysis software, was used to highlight quotes of interest and explore themes. Grounded theory methodology was followed, focusing on three main processes of analysis: (1) open coding, in which the interview content is analyzed line by line in order to identify common themes, categories, and sub-categories, (2) axial coding, in which relationships between categories are identified and re-identified, and (3) identifying a core category and extracting a grounded theory that applies to the information collected (Noble & Mitchell, 2016). The first two parts of this process were iterative and team-based, with team members performing coding separately and then

A TALE OF TWO PROJECTS (ORAL HISTORY)

Oral History (one-shot)

“Librarians Navigating Change” Oral History Project

“Academic librarianship has undergone transformative changes since the COVID pandemic. But, *shifts in essential and fundamental ways of carrying out our professional responsibilities, priorities, and development are nothing new to us*. we are experienced at adjusting to waves of expansion, contraction, and transition of all kinds.

To investigate how we do this, I’m conducting an oral history project called “Librarians Navigating Change.” The eventual goal is to have a *collection of interviews*, all from librarians who work at or have recently worked at the UC Berkeley Library (for at least 10 years), available for anyone who wants to find out more about what the past 4 decades or so have been like here. I believe that *this is the time to capture stories* of our work lives and history, as libraries are increasingly under threat; yet again, we navigate change.

I would like to ask you to be one of the project’s narrators. This would include: 1) an initial pre-interview meeting to discuss your involvement, the process, and the questions and topics we’ll cover; 2) the interview itself (the only part that is recorded); and 3) your review of the resulting transcript, in order to approve it for depositing in the UC’s eScholarship repository. *This is an entirely collaborative process.*”

DEFINITION: WHAT ARE QUALITATIVE METHODS?

- **Qualitative data are data representing information and concepts that are not represented by numbers.** They are often gathered from interviews and focus groups, personal diaries and lab notebooks, maps, photographs, and other printed materials or observations. Qualitative data are distinguished from [quantitative data](#), which focus primarily on data that can be represented with numbers.
- **Qualitative data can be analyzed in multiple ways.** One common method is data coding, which refers to the process of transforming the raw collected data into a set of meaningful categories that describe essential concepts of the data. Qualitative data and methods may be used more frequently in humanities or social science research and may be collected in descriptive studies.
- (Above definition from the [Data Glossary](#), National Center for Data Services, National Library of Medicine; taken from UC Berkeley Library “[Research Methods](#)” guide)

QUALITATIVE STUDY AND DATA COLLECTION TYPES

Qualitative Methods Overview

Phenomenology

Case Studies

Grounded Theory

Narrative Inquiry

Oral History

Feminist Approaches

Action Research

Selections from Qualitative Research
Methods guides, [Duquesne University](#), and
[Duke University](#)

Surveys	Quickly and/or easily gets lots of information from people in a non threatening way	- easy to compare and analyze - administer to many people - can get lots of data - many sample questionnaires already exist	- wording can bias client's responses - impersonal - may need sampling expert - doesn't get full story
Interviews	- Understand someone's impressions or experiences - Learn more about answers to questionnaires	- get full range and depth of information - develops relationship with client - can be flexible with client	- can take time - can be hard to analyze and compare - can be costly - interviewer can bias client's responses
Observation	Gather firsthand information about people, events, or programs	- view operations of a program as they are actually occurring - can adapt to events as they occur	- can be difficult to interpret seen behaviors - can be complex to categorize observations - can influence behaviors of program participants - can be expensive
Focus groups	Explore a topic in depth through group discussion	- quickly and reliably get common impressions - can be efficient way to get much range and depth of information in short time - can convey key information about programs	- can be hard to analyze responses - need good facilitator for safety and closure - difficult to schedule 6-8 people together
Case studies	Understand an experience or conduct comprehensive examination through cross	- depicts client's experience in program input, process and results - powerful means to portray program	- usually time consuming to collect, organize and describe - represents depth of information,

DEFINITION: WHAT IS ORAL HISTORY?

In *Doing Oral History*, Donald Ritchie explains, “Oral History collects memories and personal commentaries of historical significance through recorded interviews. An oral history interview generally consists of a ***well-prepared interviewer questioning an interviewee and recording their exchange*** in audio or video format. Recordings of the interview are transcribed, summarized, or indexed and then ***placed in a library or archives***. These interviews may be used for research or excerpted in a publication, radio or video documentary, museum exhibition, dramatization or other form of public presentation. Recordings, transcripts, catalogs, photographs and related documentary materials can also be posted on the Internet. Oral history does not include random taping, such as President Richard Nixon’s surreptitious recording of his White House conversations, ***nor does it refer to recorded speeches, wiretapping, personal diaries on tape, or other sound recordings that lack the dialogue*** between interviewer and interviewee.”

From “[Oral History: Defined](#)”, the Oral History Association

WHAT ORAL HISTORY IS **NOT**

- From the blog post by the UC Berkeley Oral History Center's Shanna Farrell: #notoralhistory (<https://update.lib.berkeley.edu/2019/09/16/notoralhistory/>)

“What was better back in the day?” the [radio] host asked.

“It’s an oral history of nostalgia, starring you. Tell us about what you think was better from a previous era, why you miss it, and whether you think it’s better because of nostalgia, or because things were, empirically, better back in the day. Call us or post below.”

My heart started to race. This call out felt so personal. They had gotten it so wrong. I pulled over and dialed their number.

A producer answered, unaware of their error.

“I just heard your next segment is on the oral history of nostalgia,” I said. “But that’s not oral history.”

I wish I would have said that oral history is defined by the planning, the transparency, the collaboration, the recording, intersubjectivity, the preservation, the legacy. I wish I would have said that it could take weeks to carefully research and write an interview outline, hours to build rapport, and months to complete an interview series. I wish I would have said that it takes practice to craft questions and to listen in stereo, picking up on the things that aren’t said, and to be comfortable sitting in silence.

ORAL HISTORY VS. oral history

A classic Oral History project generally:

- Is an in-depth process, spanning multiple sessions, and collects a full life history of the narrator
- Involves extensive background research
- Most likely to be in-person interviews
- The main “product” is the audio recording (can also be video)
- Is preserved in an archive

Challenges include:

- Adequate funding
- Having trained experienced interviewers
- Bandwidth and resources for community and family researchers (but supports are out there—check out [Storycorps](#))
- Project goals don't call for an in-depth process

ORAL HISTORY METHODOLOGY: OVERVIEW

- Formulate a central question or issue.
- Plan the project. Consider such things as end products, budget, publicity, evaluation, personnel, equipment, and time frames.
- Conduct background research.
- Interview.
- Process interviews.
- Evaluate research and interviews and cycle back (if needed).
- Organize and present results.
- Store materials archivally.

From: [Step-By-Step Guide to Oral History](#), Judith Moyer, 1999 (this is still one of the most linked-to guides)

ORAL HISTORY METHODOLOGY: MORE DETAILED PROCESS

- Interpretive Framing
 - Narrator Selection
 - Invite Letter
 - Planning and Communication with Narrator
 - Research Preparation
 - Recording Format
 - Interview Setting
 - Interview Etiquette
 - Legal Release
 - Transcription & Editing
 - Preservation
 - Interpretive Analysis
 - Sharing the Results
- Training REALLY helps! It is a very different set of approaches and methods—rigorous ones—than I was used to
 - There is a lot of background work to do! You will want to do literature reviews and a deep dive into your topic/historical period/whatever, and also on your narrators as needed
 - You will want to develop your correspondence for each stage and for each narrator, and a log keeping track of contact dates and meeting dates
 - You will want to give a lot of thought about whom to invite to be a narrator, and have backups as needed
 - You need to figure out your tech for the recording, and PRACTICE
 - You also should have a sense of where you will be depositing the materials, which in turn will inform the agreement with the narrator
 - You probably should consider a practice interview at first to be comfortable with the juggling of equipment
 - You may also want to explore transcription tools before rather than after the interview

WHY USE ORAL HISTORY (AS COMPARED TO OTHER QUALITATIVE METHODS)?

- Six primary (qualitative) approaches:
 - Ethnography
 - Grounded theory
 - Case studies
 - Narrative [OH but also discourse analysis]
 - Phenomenological
 - Action-oriented

You may decide to use oral history methodology if:

- A narrative, storytelling approach will provide the best content related to your question
- You want an in-depth approach, potentially spanning multiple interviews and full life histories
- You have community-based concerns, such as preserving the history of a neighborhood, event, or cultural group, etc.
- You want to preserve the interview content for future generations
- You want an interactive approach where interviewer and narrator each contribute to the result
- You want to focus on narrators' memories and personal experiences, and give space and power to marginalized voices (shared meaning-making)
- You do not need to perform theme analysis on your content

ORAL HISTORY AND SOCIAL JUSTICE

[“Guidelines for Social Justice Oral History Work”](#), Oral History Association’s Social Justice Task Force

This document serves as a mosaic of collective experiences from oral historians who work on the ground with vulnerable communities. These ***oral historians learned from their narrators who deeply inspired the creation of new methodologies*** that interrogated [standard OHA best practices](#). This occurred in four areas: project development, permission process, ownership, and protective and access measures. These distinctions became central to developing ***a social justice practice that took a narrator-centric focus that allowed for flexibility in project creation and completion***. It also reshaped oral history into a perspective that welcomes extended timelines to reflect ***stronger trust relations and power sharing praxis***. In short, social justice praxis “moves at the speed of trust,” empowering the narrator at every step. This document condenses these experiences into a holistic piece that helps practitioners learn from this shared experience. It is also a directive that secures power and protection for narrators.

ORAL HISTORY AND SOCIAL JUSTICE (LARGER SCALE)

Book: *Say It Forward*
<https://voiceofwitness.org/oral-history-as-social-justice/>

- Oral history is merely a formal term that describes the process of listening to and sharing stories. It's an accessible way for human beings to exchange social, cultural, and historical knowledge with each other.
- By its very nature, oral history can be thoroughly subversive, because it makes space for stories that might not otherwise be heard. It creates **a platform for individuals and communities that don't feel connected to more dominant, established narratives to speak up and share their own personal experiences**. The oral history process can empower people to count themselves as a part of history, and not separate from it, especially individuals and communities that have been marginalized or silenced.
- As we've become more critical of news media and the narrowness of perspectives, reinforcing stereotypes, we're glad to see that oral history has seen a resurgence.
- So now, we invite you to join in the oral history process. Our new book, [*Say It Forward: A Guide to Social Justice Storytelling*](#), is a DIY guide for harnessing the power of personal narrative to expose larger issues of inequality. The book features field reports, strategies, and an extensive resource section for creating your own storytelling projects.
- Take the time to talk to your grandparents about their childhood and life today. Or, start a storytelling project in your community, documenting its history and how it's changed over the years.

ORAL HISTORY: HUMAN SUBJECTS

[“Information about IRBs and Oral History”](#), Oral History Association

Revisions to the U.S. Department Health and Human Services “Policy for Protection of Human Research Subjects” (known as the Common Rule) in 2019 now exclude oral history from IRB review through a strict definition of research. The exclusion is related in the [final regulations](#) under [section §46.102](#):

1. Research means a systematic investigation, including research development, testing, and evaluation, designed to develop or contribute to generalizable knowledge. Activities that meet this definition constitute research for purposes of this policy, whether or not they are conducted or supported under a program that is considered research for other purposes. For example, some demonstration and service programs may include research activities. For purposes of this part, ***the following activities are deemed not to be research:***

- ***Scholarly and journalistic activities (e.g., oral history, journalism, biography, literary criticism, legal research, and historical scholarship), including the collection and use of information, that focus directly on the specific individuals about whom the information is collected.***

The Office for Human Research Protections, which oversees federal policy on human subjects research, has offered additional [guidance](#). Oral history is excluded as long as it falls under the category of “scholarly and journalistic activities that collect and use information about specific individuals themselves.” On the other hand “studies using methods such as participant observation and ethnographic studies, in which investigators gather information from individuals in order to understand the beliefs, customs, and practices, not only of those individuals, but also of the community or group to which they belong” would represent “generalizable knowledge” and therefore not excluded from IRB review under these new rules.

ORAL HISTORY: NARRATOR RIGHTS

This and next slide: “[Archiving Oral History: Manual of Best Practices](#)”,
Oral History Association

Narrator Rights in an Archival Relationship

A narrator should retain the right to easily access and use the content of their interview through the terms established by the project agreement. ***Providing ongoing access and usage rights is one way for a repository to acknowledge a narrator’s irreplicable relationship to the experiences and stories*** shared in the oral history.

Consideration should also be given to requests from family and community members to access or use oral histories. Repositories should work to eliminate any barriers to access and usage as identified by the narrator, family, or community members.

In some cases, a narrator’s position on the public’s access and use of their oral history may evolve, resulting in requests for the repository to increase or limit access or to remove the oral history from the collection altogether. Repositories should recognize the significance of such requests and accommodate them whenever possible.

Across all discussions around narrator rights, it is important to ***prioritize good relationship building and to recognize that project forms and interview documentation may require multiple revisions and updates throughout the lifecycle of each oral history interview.***

Changes in agreements may also necessitate updates to description of interviews in catalogs, finding aids, and other discovery tools.

ORAL HISTORY: PRESERVATION

It is important for oral historians and archivists to understand the responsibility for ***ensuring the long-term preservation of an oral history interview***. Oral history as a field of practice prioritizes preserving the original recording of the interview as well as related documentation. Therefore, the use of audiovisual materials in oral history practice, whether analog or digital, inherently requires an appropriate and robust preservation plan. The ***obsolescence of media formats should be considered and planned for***.

Every effort should be made to ensure oral history materials are adequately stored, processed, maintained, and accessible according to archival standards and best practices. Continued maintenance of the interviews and related materials ensures continued access to, and viability of, the materials for long-term preservation. ***Oral history practitioners and archival institutions should carefully review their infrastructure and resources to determine whether they are able to effectively undertake or intake an oral history project/collection***. Individuals and organizations should determine if it's necessary to deposit materials into more experienced or better-supported repositories.

USING ORAL HISTORY COLLECTIONS

- As a primary source for exploring historical eras, geographies, events, cultures
- As a tool for learning to do qualitative methods
- As an example for project planning
- As an example for potential narrators considering being part of a study
- As a resource for classroom exercises and learning (some very interesting student oral history projects have come out of course assignments)
- As an enhancement for other kinds of content (such as alongside museum exhibits of artefacts)
- Increasing interest in using them for text mining and AI (you knew that was coming)

BEST PRACTICES USING ORAL HISTORY IN THE CLASSROOM

<https://edsitement.neh.gov/teachers-guides/oral-history-educational-experience>

“These quotes are courtesy of students who have participated in the Veterans oral history project developed by Mrs. Jennifer Davidson of Southern High School in Anne Arundel County, Maryland. Mrs. Davidson designed a program that has students work in groups to conduct oral history interviews with residents of Maryland who served in Vietnam.

Students learned about the “twists and turns” of life, the moment-to-moment decisions that changed lives, and the backstories that made essential connections between biography and history. Ultimately, they used their oral history interviews to produce compelling short video documentaries containing interpretations that give new meaning to the Vietnam experience. Public celebrations honoring the veterans have been the culminating events over the last two years of the program. In addition, the historical documents will ultimately reside at the Maryland State Archives.”

“It was an amazing experience to meet and talk to a veteran.”

“I feel more connected to history.”

“I feel very proud and happy that I did this... My opinion of history has changed... it seems much more interesting now.”

“This oral history experience was amazing. I learned so much and will never forget this!”

—Students from the Veterans Oral History Project

INDEPENDENT PRACTITIONERS'

TOOLKIT

FOR ORAL HISTORIANS

Assembled by the

Independent Practitioners' Task Force

of the Oral History Association

2020-2021

A GUIDE TO
FREELANCING!

https://oralhistory.org/wp-content/uploads/2021/10/Independent_Practitioners_Toolkit_for_Oral_Historians_2020-2021.pdf

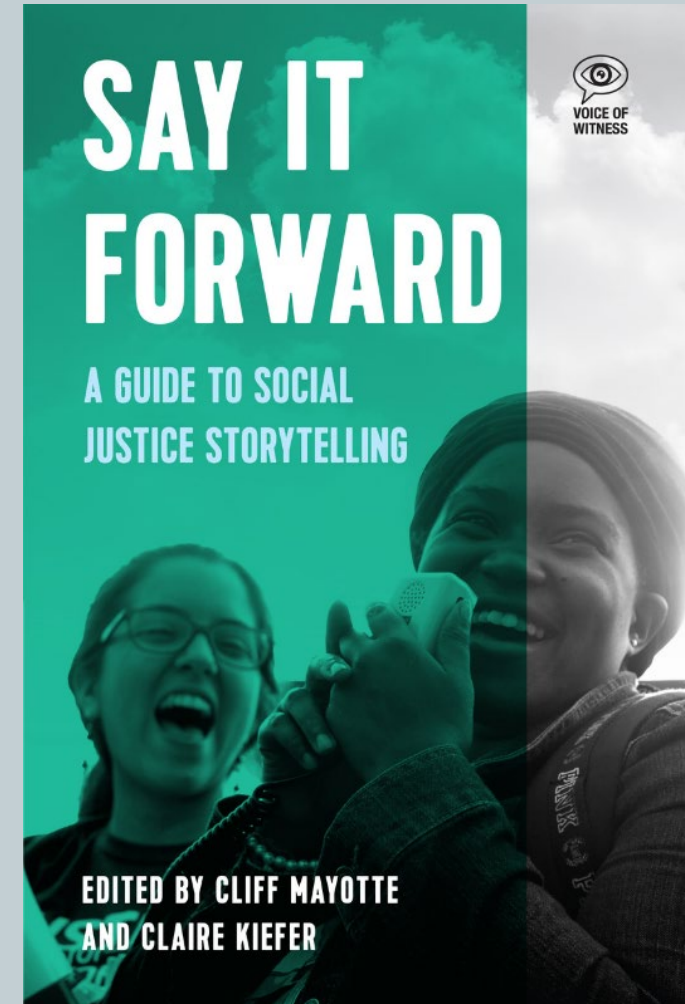
ORAL HISTORY RESOURCES FROM THE UNIVERSITY OF CALIFORNIA

- [Remote Interviewing with Zoom](#), UC Berkeley
- [Oral History Toolkit](#), UC Irvine
- [Oral History Interviewing Guidelines](#), UCLA
- [Transcribing Oral Histories for “Race and Oral History”](#), UC San Diego
- [Oral History Methodology: The Art of Interviewing](#), UC Santa Barbara
- [Oral History Primer](#), UC Santa Cruz
- [Oral History Research Guide](#), UC Santa Cruz

FURTHER READING

- Journal: *The Oral History Review*
- *Doing Oral History*, by Donald Ritchie (2003)
- *Oral History for the Qualitative Researcher: Choreographing the Story*, by Valerie Janesick
- *Oral History at a Distance*, by Steven Sielaff
- *Oral History: Understanding Qualitative Research*, by Patricia Leavy (2011)
- *Oral History Theory*, by Lynn Abrams (2010)
- Portelli, Alessandro. “What Makes Oral History Different?” In *Oral History, Oral Culture, and Italian Americans*, edited by Luisa del Guidice, pp. 21-30. Springer.

“In this important article from 1979, Portelli argues that orality, narrative form, subjectivity, memory, and the relationship between the interviewer and the interviewee – all distinctive characteristics of oral history – should be considered oral history’s strengths, not weaknesses.”



THANK YOU! QUESTIONS?

Contact me!

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Photo: Cat tail question mark by Mauro on
[Flickr](#)

