



Wk 1: Outreach and Recruitment

One of the things we discuss in BTA is due diligence. For our purposes, due diligence is not a legal or business term but rather a call to action.

Due diligence: The minimum amount of effort or work one should do before releasing the responsibility in good faith.

The purpose of this definition is to keep ourselves accountable to a reasonable degree. Sometimes people will just be impossible to get ahold of again - this can be because of any number of reasons, and is one of the most consistent struggles of an oral historian. Use the table below to determine your own best practices in regards to outreach and communication.

Reflection Questions	Narrator 1	Narrator 2
<i>What is the narrator's comfort level with me/technology?</i>		
<i>What is the max number of times I can reach out before becoming invasive or annoying?</i>		
<i>What is the min amount of times I should reach out to avoid being neglectful?</i>		
<i>How have I met the narrator where they are at? How have I tried to eliminate barriers?</i>		

If you find that you've reached the end of the path with outreach attempts, be sure to **keep the door open!** Your narrator might be going through something outside of your awareness or understanding, and may respond once things settle down. You always want to make sure you give them some way to connect with you when they're ready.



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Elevator Pitches

A helpful tool to develop for your outreach and recruitment efforts is an elevator pitch. The idea of an elevator pitch is that you've got a **short window of time to convince someone to do some kind of action.**

This is sometimes seen in movies, when the protagonist keeps the elevator door open as they rapidly explain to their superior why their idea for the big project is best.

Here's another way of thinking about what its purpose is:

"You're not trying to convey your entire business strategy or all your main points. Your goal here is to raise interest, make a connection, and facilitate an opportunity for business in the future."

These are the key components of an elevator pitch:

- **The hook:** This is something that will pull the listener in, this can be pretty simple and straight to the point. I often think of rhetorical questions, or personal stories or quips.
- **The value:** What is the goal, or the why of your proposition - answers the question for the listener, "Why should I care?"
- **The differentiator:** Why is their participation important or valuable?
- **The call to action:** The action we want someone to take after hearing our information. For us, this would be affirming their interest in being interviewed and scheduling a pre-interview.

Use the above pieces and parts to practice making an elevator pitch.



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Why is it important to decide on my goals before narrator recruitment?

Your target audience will influence who they want to listen to — remember, we are working in service to the communities we collect histories for. Maybe you share in the community and can also relate and evaluate your wants, but ultimately we want to consider the whole community, not just ourselves.

So first we define a goal, such as “uplifting queer voices” and then we narrow our scope by determining the target audience within our goal.

Example target audiences, goals, and people they might prioritize listening to:

Non-queer people (to educate)	→	Queer educators, queer politicians
Queer community (to build/strengthen)	→	Queer elders, queer activists
Therapist who serves queer folks (to further educate)	→	Queer disabled individuals who utilize therapy

In the examples above, we have three potential target audiences and who they might listen to, giving us a better idea of narrators to focus on recruiting for the project.

Recruitment

Alright, we’ve determined a goal, a target audience, and even what an ideal narrator might be. Now... how do we find them?? Finding narrators can be a deceptively difficult part of the oral history process.

One of our best resources is each other — other oral historians, friends, and networks. When you have an idea of who you’re looking for, it’s always a good idea to send out an ISO (“In Search Of”) to your networks. A personal referral often is more successful than 'cold' outreach, as your network can vouch for you, give you greater credibility/trust, and help with connecting or following up if needed.



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Here are some examples of how we can recruit:

- Social Media
- Event Hopping/Word of Mouth
- Relevant community organizations, affinity groups, and nonprofit partnerships
- Advertisements: Library bulletin boards, craigslist, coffee shops, etc!
- Secondary introductions from existing contacts or participants, also known as 'snowball sampling'

Timing

- We suggest waiting about 5-10 days between first and second attempts at contact through the same avenue (ex, emailing both times)
 - If changing contact mode (ex, emailing first and then calling next), you can wait a shorter amount of time, at least 3 days at minimum.
 - Get creative if you aren't hearing back—do they have any social media accounts that you can DM? Have you tried emailing and calling? Have you tried calling at different times of the day?
 - For emailing, you can always CC Oral History Manager. Sometimes this helps get a response!
- Be aware of holidays (including non-traditional US ones, like Jewish and Islamic holidays), weekends, and the season when deciding when and how often to contact someone. Use any context clues about the person's identity to help you be mindful of when people may be slower to respond to contact requests.
 - For example: are they a teacher? An organizer? How might their schedules and modes of communication be impacted by these identities?
- If you haven't gotten a response after 3 attempts at contact through one mode (5 total attempts through different modes), **that lack of response is your response**. Assume that that lead is a dead end for now.
 - There is a chance they will get back to you later, but I wouldn't push it any further from your end. They are either uninterested, too busy, or are not checking those contact methods (that inbox, that voicemail, etc).



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What to say?

For any of these options, we suggest preparing a short blurb of what you will say to folks that you approach. Keep your first message on the shorter side—a long email is intimidating for most folks! Focus on what context you need to give to get to a pre-interview or additional conversation. A few things to address:

- **What is the purpose or goal of the project?**

- Is it to get published? To archive interviews? Background research? General practice? etc... Most people want to know if and how/where the interview may be shared.

- **What are your values and ethical approach to interviewing?**

- In particular, be clear that this is an oral history interview, which is different from other forms of interviewing (journalistic, ethnographic) in its ethics and how those ethics inform practice.
- Narrator's authority, comfort, and experience in the interview is one of our biggest priorities in our practice. They do not have to answer or talk about anything that they don't want to.

- **Logistics: What is the central “ask”? What parts of the experience are adaptable based on their comfort and needs?**

- Set expectations: we usually set aside 1.5-2 hours of time for interviews. They can be shorter if that time commitment is too much. The interview can be over Zoom or in person (if in similar areas of the country).
- “The general topic/focus of the interview is _____. That being said, we want this to be a positive experience for you too, so please let us know if there are any parts of your life or topics that you would like to avoid.”
 - (for NPHM interviews, we usually focus on public housing but may also have an additional theme/focus that we want to ask about. For example: entrepreneurship in PH).

- **Offer a pre-interview before setting the expectation of a full oral history interview.**

- On this note, consider whether it makes more sense to start building a friendly relationship with the potential narrators before asking for an interview or a pre-interview. Depending on which of the following strategies you're trying, it can be off-putting to have someone approach you and ask for something right away.



Potential Narrator Info Packet

A 2-page overview of NPHM and its oral history interview process:

<https://tinyurl.com/NarratorInfoSheet>



Wk 2: Preparation and Research

You don't know what you don't know.

Before going into an interview, it is important to have some **background knowledge** about the person you are interviewing, what you're **hoping to learn** from your narrator, and any other **relevant contextual information**.

For example:

- *Has this person been interviewed before for this project/archive? Have you listened to it?*
- *Has this person been interviewed before for other archives, podcasts, or projects? Have you listened to it?*
- *What is this person's relationship to public housing (and the topic of your specific project)?*
- *Is there some element of a story or period of time that only they can explain?*
- *Do you need/want a recording of this person telling a story you've heard off-tape; or singing/ making other unique sounds?*

If time and capacity allows, we suggest conducting a short and informal **pre-interview** with narrators to help you answer these questions. Pre-interviews are typically 5-15 minute, relaxed, and un-recorded phone calls.

Goals of the Pre-Interview:

- *Establish rapport and trust with the narrator.*
- *Set expectations for the flow, content, and technical set-up of the interview.*
- *Learn initial information about the narrator to assist your interview preparation.*

Pre-interviews can happen **in combination with outreach** (for example, if someone is on the fence about being interviewed and wants to learn more about what to expect).

Interviewing Stages:

1. **Outreach**, you are making initial contact with a narrator
2. **Pre-Interview**, you are getting to know the narrator and preparing both for the interview and reviewing consent and boundaries
3. **Interview**, you are conducting and recording the interview with the narrator
4. **Post-Interview**, creating the post-production deliverables that are required for your own use or the archive you are working with (often a written transcription and finding aid); reviewing all materials with the narrator and finalizing their consent for the materials that will be submitted; and preparing these materials and paperwork for the archive.
5. **Submission to Archive**, all paperwork, consent, audio, etc is finalized and submitted to NPHM for archival preservation.



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While the interview stages on the opposite page are the key steps towards collecting and archiving an oral history interview, what are some other tasks that you might want to have on your radar or timeline? (e.g. Aftercare)

Pre-Interview:

As we discussed during Trauma Informed Care week of the Summer Training (page 18), consent & boundaries are a huge part of our work as oral historians, and setting these expectations from the get go can help our narrators feel more in control of the process. Reflect on the following questions, and return to them whenever you are preparing for a new pre-interview.

What questions would help you better understand someone's boundaries or triggers?

What questions would help you understand what excites someone about the prospect of interviewing for this topic?

What are common topics around public housing that are considered difficult to talk about? Why?

What is the difference between a consent or boundary violation versus being uncomfortable?