Metadata Elements for Oral History_1.1

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Description

This list of metadata elements is a work product of the [Oral History Association's Metadata Task Force](#) (OHAMTF), published under a CC-BY-4.0 license. Its purpose is to serve as a reference resource for practitioners managing oral history projects and collections. The list includes specific information that practitioners could capture and preserve as metadata about oral history interviews and collections. This elements set, or list, is intentionally "schema-agnostic" and massive, and it is intended to contain all the possible types of information a given practitioner may want to collect, capture, or share about their oral histories.

While this list is comprehensive it is not intended to be prescriptive. Practitioners do not need to use every element in the list; rather, the list is meant to present an exhaustive set of information that practitioners may use as a decision-making tool for collecting, capturing, and sharing information about their oral histories. Users of this list are encouraged to utilize it at the beginning of new projects, to evaluate existing workflows, to crosswalk or map fields from one system or platform to another, or simply as a reference.

Similarly, the list does not conform to any one particular metadata standard or schema. It is a system/schema-agnostic set of elements that multiple practitioners across disciplines have contributed to and assessed. The elements in this list could be captured, preserved, utilized, and adapted based on the particular needs, schemas, and systems in place for a given oral history project or institution, and the elements could be configured and maintained in various structures based on these particular needs.

Alongside each suggested element, the OHAMTF has prepared descriptions meant to guide users about the meaning of the element, potential uses, and any considerations practitioners might wish to note. In some element descriptions, the OHAMTF provides examples or suggests information users could include in a given field. Please note these examples are not meant to be exhaustive, and users of this list could include whatever information is appropriate for their needs. Please also note that the format of examples given (such as date) are meant to be illustrative, not prescriptive. Users of this list could format the data in whatever way is appropriate for their needs. The information captured within each field could be broken out within a customized controlled vocabulary or retained in narrative form. Finally, elements could be repeatable as needed.

In this list, each element also includes a suggested lifecycle stage during which the element is most likely to be applied. This refers to the following oral history lifecycle: Plan, Interview, Process, and Disseminate. These stages are a recommendation, and practitioners may use

elements during whichever stage is appropriate for the needs of their projects, workflows, or institutional practices. Although users of this list are free to sort the elements in different ways, one recommendation is to sort, review, and assess the list by lifecycle stage. Please note that the Process stage could also include maintenance on the collections after dissemination, such as format migration.

Notably, this list also includes a column for noting where the oral history metadata is (or may be) stored. Practitioners are encouraged to make use of this column to help in their own decision-making and metadata organization. Completing this task of noting where various pieces of metadata are stored can be a helpful information sharing exercise for a team working on the same project and serve as a check-in for details that might have gotten lost.

Although version 1.1 will likely be the public, published version through 2022, this list is not considered finite as technology advances and practices evolve. Curious, motivated, and committed metadata/oral history practitioners are welcome to connect with the OHAMTF with questions and to discuss future collaborations.

This list is centrally located and available for download on [the OHA Archipelago Commons](#).

The OHAMTF has also developed [practitioner profiles](#) including real examples of oral history practitioners' decisions about which elements from this list they use for their collections, based on the nature and needs of their collections and institutions. These profiles are also meant to aid in oral history metadata decision-making.

Sourcing Methodology
From its inception, this list has been crowdsourced in nature. It originated in 2013 from a series of brainstorming workshops at regional oral history conferences across the US, where attendees were given the prompt "What's Important to Know About Oral History?" From these beginnings, OHAMTF normalized, refined, and coalesced the elements. Additionally, we updated this list multiple times based on [survey responses](#), feedback we received from conference presentations, and other feedback from practitioners across the United States and beyond from roughly 2016 through 2019. Some elements in the list may look familiar, as contributors were practitioners in the cultural heritage community whose work is informed and guided by existing schemas and standards.

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Related Resources

Oral History Metadata and Description: A Survey of Practices

Field Descriptions

Lifecycle Stage: An oral history lifecycle stage (Plan, Interview, Process, Disseminate) has been assigned to each element according to when it is first likely to emerge.

Element Name: These are the names of the elements.

Element Description: These are the descriptions of how these elements can be used and understood.

Where Data Stored: Optional: Use this column to note where you already keep or plan to keep this information. This could be a record type such as 'Dublin Core record' or it could be the name of a document or database where you store the information such as 'MS Access database,' or 'Pre-interview Questionnaire.'

Element Mapping: Optional: Create a mapping here of the record tag or field where you already store or plan to store this element information. For example, '245' in a MARC record or 'Source' in a VRA Core record.

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Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Plan	Description of supplemental materials	Description of any additional materials given by interviewee or gathered during the research or interview process. Could include field notes and other preparatory materials used for research by interviewers. Could be open for public use or closed.		
Plan	Expertise/qualifications of interviewer	Contextual background information about the interviewer. Could include formal or informal training, prior experience, and education information.		
Plan	Intended audience	A specific audience intended by creators of the interview/project.		
Plan	Interviewee biographical history info	Personal, educational, service, occupational, professional history of interviewee. For example: hometown, place of birth, affiliated organizations.		
Plan	Interviewer preparation	How the interviewer prepared for the interview including notes about training. For example: their research prior to the interview, sources consulted, topical/question lists.		
Plan	Interviewer selection process	Background information on selection and onboarding process for interviewers.		
Plan	Interviewer/interviewee connection	How the interviewer and interviewee met or know each other. For example: student interviewer matched with elder whose language she can speak fluently.		
Plan	Organizations supporting interview process	Organizations that played any number of roles in the interview process. For example: funders, staffing, research support.		
Plan	Purpose	Any information about why the interview or project happened. Could be where "About this Project" information is captured.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Plan	Reason for selection of this interviewee	For example: the alumni office solicited an interview for a homecoming event.		
Plan	Researcher contact info	The person who completed research in preparation for the interview. Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, & Social Media Handle.		
Plan	Researcher name	The person who completed research in preparation for the interview. Could include: Full Name, Alternate Name.		
Plan	Sponsor/funder contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Plan	Sponsor/funder name	Could include: Full Name, Alternate Name.		
Plan	Stakeholder notes and questions	Inclusive field for information that is being communicated (written or verbally) from stakeholders during all stages of the interview lifecycle. Could include questions from before the interview, interviewee instructions, transcriber questions, or proper wording.		
Interview	Additional information about interview recording room	Contextual information about the interview recording room that may aid in understanding interview circumstances. For example: open windows, a shared space.		
Interview	Age of interviewee at time of interview	Could be used in place of or in addition to a birthdate. Consider privacy concerns.		
Interview	Age of interviewer at time of interview	Could be used in place of or in addition to a birthdate. Consider privacy concerns.		
Interview	Community represented in the interview	For example: membership in ethnic, religious, gender, and other communities. Consider the concept of shared authority when assigning labels.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Interview	Compensation details for anyone involved in interview	For example: interviewees receiving a .wav file of their interview recording or an intern earning class credit for her role as interviewer.		
Interview	Copyright holder contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Interview	Copyright holder name	Could include: Full Name, Alternate Name.		
Interview	Duration (recording)	For example: 1 hours and 30 minutes, 01:30:00.		
Interview	Existence of release form	Could be interview agreement, release form, consent form, deed of gift, or any other legal form.		
Interview	Family members of interviewee contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle. For example: genealogical research.		
Interview	Family members of interviewee names	Could include: Full Name, Alternate Name. For example: genealogical research.		
Interview	Format (recording)	Could be for physical or digital materials. Could include original media as well as access or mezzanine copies. For example: .wav file, cassette tape.		
Interview	Funding story for interview	Any additional information about funding or support for the interview or project.		
Interview	Gender of interviewee	Consider input from interviewee when assigning identity labels, even long after the interview was conducted or before the interview is made publicly available.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Interview	Interview date	For example: 2/11/2021.		
Interview	Interview location	For example: geolocation, GPS coordinates, street addresses. Consider privacy issues.		
Interview	Interview recording method	Could indicate audio or video recording. Could also document multiple camera positions or other recording setups. For example: moving image, sound recording.		
Interview	Interview time	For example: 2 pm.		
Interview	Interviewee condition	Observable and/or self-reported behaviors and state of being, including emotional, mental, physical, or circumstantial states. Note of caution: subjective behavioral observations can be sensitive in nature. Consider privacy issues.		
Interview	Interviewee contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Interview	Interviewee date of birth	Consider privacy issues.		
Interview	Interviewee name	Could include: Full Name, Alternate Name.		
Interview	Interviewer condition	Observable and/or self-reported behaviors and state of being, including emotional, mental, physical, or circumstantial states. Note of caution: subjective behavioral observations can be sensitive in nature. Consider privacy issues.		
Interview	Interviewer contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Interview	Interviewer date of birth	Consider privacy issues.		
Interview	Interviewer name	Could include: Full Name, Alternate Name.		
Interview	Language of interviewee	Information about the interviewee's languages. Could include a note on fluency and identity of language speaker, as well as where and when the person uses the languages used in the interview. For example: Primarily Spanish spoken at home, English at school.		
Interview	Language of interviewer	Information about the interviewee's languages. Could include a note on fluency and identity of language speaker, as well as where and when the person uses the languages used in the interview. For example: Primarily Spanish spoken at home, English at school.		
Interview	Language spoken in interview	For all languages spoken during an interview. Could describe interviews in which a translator is present, where the narrator speaks in different languages, or if a portion of an interview includes another language from the primary language used.		
Interview	Next of kin of interviewee	Legal representative of interviewee after their death concerning rights management. Could include: Full Name, Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Alternate Name, Social Media Handle. Consider privacy issues.		
Interview	Original recording media type	For example: open-reel tape, Sony miniDV tape, Sandisk SD card.		
Interview	Others present at the interview contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Interview	Others present at the interview name	Could include: Full Name, Alternate Name.		
Interview	Quality of audio	Overall quality of acoustics during interview. Could include any technical disruptions or general notes about equipment. For example: microphone malfunction at five minute mark, increase in static for the final twenty minutes.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Interview	Race of interviewee	Consider input from interviewee when assigning identity labels, even long after the interview was conducted or before the interview is made publicly available.		
Interview	Recording conditions	Any additional information about possible disruptions or noise during the recording. For example: coughing, machine noise, recorded in front of a live audience.		
Interview	Recording equipment used	Make and model of recording equipment, hardware, and supplies. For example: recording devices, microphones, cameras.		
Interview	Regional dialect of interviewee	Could also include accent information.		
Interview	Regional dialect of interviewer	Could also include accent information.		
Interview	Relationship of others in the room to the interviewee	For example: daughter of interviewee.		
Interview	Relationship of recording location to its participants	For example: interviewee's home, interviewer's office. Consider privacy issues.		
Interview	Religion of interviewee	Consider input from interviewee when assigning identity labels, even long after the interview was conducted or before the interview is made publicly available.		
Interview	Technician in the room contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle		
Interview	Technician in the room name	For example: audio producer, videographer, lighting technician. Could include: Full Name, Alternate Name.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Interview	Translator contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Interview	Translator name	Translation during interview or afterward during processing. Could include: Full Name, Alternate Name.		
Process	Accession date	Date materials formally accessioned.		
Process	Archival processing location	Could include multiple locations for various formats and interview components. For example: audio editing, cataloging, transcription.		
Process	Audio/video editor contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Audio/video editor name	Could include: Full Name, Alternate Name.		
Process	Captioner contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Captioner name	Could include: Full Name, Alternate Name.		
Process	Cataloger contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Cataloger name	Could include: Full Name, Alternate Name.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Process	Condition of media	For all physical and digital materials associated with the interview. For example: note of sticky shed observed on magnetic tape, proprietary digital formats in need of migration, age of optical media storage.		
Process	Controlled vocabulary subject headings	Could be used to store the vocabulary subject headings.		
Process	Correction/redaction notes	Could be notes of changes made to recordings or to supplementary materials such as transcriptions. For example: interviewee reveals private medical info during interview and then asks for it to be redacted from the record.		
Process	Date interview discovered in collections	Materials found in storage locations that haven't previously been described or inventoried.		
Process	Description of group of interviews	Context for interviews. Could include who organized the interview, the interviewer, research questions, when and where the interview took place, or if the interview is part of a larger event.		
Process	Digitizer contact info	The person or company who did the digitization work. Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Digitizer name	The person or company who did the digitization work. Could include: Full Name, Alternate Name.		
Process	Donation date	Date materials arrived or were transferred.		
Process	Donation story	Any additional information about circumstances and backstory (provenance) of the acquisition of materials. For example: retiring professor donating tapes to the repository years later.		
Process	File names	For all physical and digital materials associated with the interview. Could be applied at item or collection level.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Process	Format (derivative materials)	Could be for physical or digital materials. For example: printed transcript, video clip in .mp4, tape log Word document.		
Process	Format (supplemental material	Could be physical or digital materials. Could include any additional materials given by interviewee or gathered during the research/interview process, or preparatory materials used for research by interviewers. For example: newspaper clipping, scrapbook, .jpg.		
Process	Format migration process	Additional information about migration circumstances and processes implemented. For example: cassette tape digitized and .wav file saved on preservation server on 2/15/22.		
Process	Groups/organizations mentioned during the interview contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address & Social Media Handle.		
Process	Groups/organizations mentioned during the interview names	Could include: Full Name, Alternate Name.		
Process	Holder of preservation copies contact info	Could be individuals or organizations. Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Holder of preservation copies name	Could be individuals or organizations. Could include: Full Name, Alternate Name.		
Process	Index	Could be used to indicate the existance of an index, or to store the index content.		
Process	Indexer contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Indexer name	Could include: Full Name, Alternate Name.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Process	Index type	For example: Tape log, audio log, abstract, proper Word form, OHMS index, question list, subject index.		
Process	Intent vs. outcome	Could be used to flag interview content that falls outside the scope of the original intended topic. For example: a life history interview that reveals details of the founding of an organization.		
Process	Interview summary	Narrative description of interview content. Could be formatted as an abstract.		
Process	Language (derivative materials)	Could include multiple translations. Could be transcripts, indices, tape logs, captions. For example: Spanish and English transcriptions available.		
Process	Method used for accession	Description of process used for deposit or transfer between parties of interview, metadata, and supplementary materials.		
Process	Name of controlled vocabulary used	For example: LoC, regional vocabulary.		
Process	Name of group of interviews	Project or series as defined by the institution. For example: a series of twelve interviews with the same interviewee.		
Process	Name/version of software used	Software used at any point in the production or preservation of interview. For example: DAMS, editing software.		
Process	New knowledge	For any additional information discovered or gleaned retrospectively about the project origins. For example: a relative finds an oral history transcript online and contacts repository to share information or a crowdsourced comment sheds light on a project.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Process	Number of interviews in group	Amount within a project or series as defined by the institution. For example: a series of ten interviews with the same interviewee.		
Process	Objects referenced in interview	For example: photographs, maps.		
Process	People mentioned during the interview contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address & Social Media Handle.		
Process	People mentioned during the interview name	Could include: Full Name, Alternate Name.		
Process	Person who processed the interview contact info	Person who prepared interviews for future use. Could be multiple people at multiple stages. Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, & Social Media Handle.		
Process	Person who processed the interview name	Person who prepared interviews for future use. Could be multiple people at multiple stages. Could include: Full Name, Alternate Name.		
Process	Preservation methods	Methods used to capture, process, or move interviews into a preservation environment. For example: baking tapes, descriptions of physical storage evironments, processing workflows.		
Process	Process for digital verification	Could include details concerning use of checksums, file naming conventions, decision trees, or backup infrastructure.		
Process	Processing hardware used	Names and/or models of hardware used in the processing or preservation of interview. For example: transcription pedals, scanners, digitization decks.		
Process	Processing milestone dates	For example: interview recording received on 3/6/1985, draft transcript sent to interviewee on January 14, 2017.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Process	Processing software used	Names and/or versions of software used at any point in the processing or preservation of interview. For example: DAMS, editing and captioning software.		
Process	Quantity (derivative materials)	Quantities, lengths, and inventories of physical or digital media. For example: two physical transcript copies, four edited video clips, fifty-word photo caption.		
Process	Quantity (recording)	Quantities and inventories of physical or digital media used to record interview or tracks created as part of a whole interview. For example: two cassette tapes or five fifteen-minute .wav tracks.		
Process	Quantity (supplemental materia	Quantities and inventories of physical or digital media. For example: 300 digital photos, two wedding invitations.		
Process	Schedule for format migration and fixity verification	Could be date of next activity or span of time between processes.		
Process	Storage location (derivative ma	Could be for either physical or digital storage locations. For example: offsite storage, room 310 - range 7, DAMS drive.		
Process	Storage location (recording)	Could be for either physical or digital storage locations. Could be storage location for original analog or digital media. Could be used for location of preservation master, mezzanine, or access copies. For example: offsite storage, room 310 - range 7, DAMS drive.		
Process	Storage location (supplementa	Could be for either physical or digital storage locations. Could be storage location for any additional materials given by interviewee or gathered during the research/interview process, or preparatory materials used for research by interviewers. For example: offsite storage, room 310 - range 7, DAMS drive.		
Process	Subjects discussed	For example: historic events, social movements, subcultures, individuals, organizations, places (geolocation, GPS coordinates, street addresses).		
Process	Title of interview	Name given to the interview. Could contain series information.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Process	Topical date range	Could be narrative or numeric description. For example: 1960s, This interview took place ten years after X event.		
Process	Total number of interviews at institution	All interviews across all groups.		
Process	Transcriber contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Transcriber name	Could include: Full Name, Alternate Name.		
Process	Transcript	Could be used to indicate the existance of a transcript, or to store the transcript content.		
Process	Transcript editor contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Process	Transcript editor name	Could include: Full Name, Alternate Name.		
Process	Unique identifier	Could be alpha or numeric to accomodate local vocabularies and naming conventions.		
Disseminate	Date made open for research	Also known as embargo date. Could include dates when various materials were or will be made accessible. For example: full interview can be fully accessible January 1, 2040, edited clips published 3/2/2015.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Disseminate	Derivative works citing the interview	Could include documentaries, articles, or live performances.		
Disseminate	Digital storage size	Could be size of an individual file or all files associated with an interview or group of interviews.		
Disseminate	Location of materials online (URL)	Could be used to document individual interviews or collections that are part of a searchable database or linked from a catalog. For example: a link to a repository website, permalink to an interview in a public content management system, link to a private cloud-based interface.		
Disseminate	On-site access info	Could include location or hours of operation.		
Disseminate	Preferred citation	Could include exact wording required for a proper citation or simply the repository location. Could also be an acknowledgement statement.		
Disseminate	Publisher contact info	Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Disseminate	Publisher name	Could include: Full Name, Alternate Name.		
Disseminate	Related resources	Could be names and locations of related archival resources, published materials, or exhibitions. Could include items within or beyond the interview's respository.		
Disseminate	Repository	Could be organizational information, institutional description, location information, or reference to the name of a repository represented in an online portal.		
Disseminate	Restriction conditions	Could include use and access instructions from the interviewee, administrators, copyright holder, or repository.		

Lifecycle Stage	Element Name	Element Description	Where Data Stored	Element Mapping
Disseminate	Terms of use	Could be online and/or on-site restrictions requested by donor or based on institutional policy. Could include licensing rules or rules for how data can be extracted/manipulated. For example: accessible by reading room appointment only.		
Disseminate	User of interview contact info	Could be individuals or organizations making use of the interview for the purposes of research or creative projects. Could include: Phone Number, E-mail Address, Institutional Affiliation, Mailing Address, Social Media Handle.		
Disseminate	User of interview name	Could be individuals or organizations making use of the interview for the purposes of research or creative projects. Could include: Full Name, Alternate Name.		