Oral Histories

• COLLECTING, PRESERVING, AND SHARING CHURCH HISTORY •
Oral Histories

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Focus ideas for your oral history project.
Research the background of your project idea, and choose someone to interview based on available resources.
Prepare an outline of your interview.
Learn how to use a digital recorder.
Choose an appropriate location and time.
Extend an invitation for the interview.

Provide instructions to the interviewee before the interview.
Have the interviewee sign an Church History Department Donation Agreement.
Ensure the recorder is running and placed properly; minimize distractions.
Record an opening statement, including:
   - Names of people who are present
   - The date
   - Your location
   - The purpose of the interview
Keep the interview on track, and ask follow-up questions.
Let the interviewee do most of the talking.
Collect other relevant records if possible.

Fill out the cataloging worksheet and index.
Scan the signed donation agreement.
Place the following electronic files in a folder:
   - Audio recording of oral history
   - Cataloging worksheet and index
   - Scanned donation agreement

Use FileSend to submit the folder to oralhistories@ldschurch.org.
In November 1831, the Lord commanded John Whitmer to make “a history of all the important things which he shall observe and know concerning my church.” The Lord further stated that this history would “be for the good of the church, and for the rising generations” (D&C 69:3, 8). Church leaders have taught that remembering can increase gratitude for God’s kindness, strengthen a person’s resolve to live the gospel, and provide a pattern for living the gospel and overcoming adversity (see Henry B. Eyring, “O Remember, Remember,” *Ensign or Liahona*, Nov. 2007, 66–69; Marlin K. Jensen, “Remember and Perish Not,” *Ensign or Liahona*, May 2007, 36–38).

An effective way to collect Church history is to conduct oral history interviews. Oral histories are a valuable tool for capturing and preserving information about historical events, major developments in Church units, lives of individual members, testimonies, and memories that may otherwise be lost. Oral histories also allow for in-depth analysis of a topic or event. Allowing people to use their own words can move them to share aspects of their faith, testimonies, and experiences that may not be recorded in writing.

As with all Church history work, a focused approach with clear objectives is more likely to produce success. Oral histories should be conducted in harmony with the area Church history plan. Church history advisers may conduct oral history interviews or oversee others who conduct them. Following the four-step process described in this guide will improve the quality of each oral history.
Oral History Instructions

Preparing for an Interview

Oral History Projects

Everyone has a story to share. There are many possibilities for using oral histories to document Church history. To avoid becoming overwhelmed and losing focus, you may want to think in terms of oral history projects that align with the area Church history plan.

Examples of possible projects:

- Families who have been pioneers in a given locality
- Area Seventies and released mission presidents, along with their wives
- Current and former bishops, Relief Society presidents, and other leaders in a given ward
- Recently returned missionaries, new converts to the Church, or youth

Purpose and Background

When preparing, be sure to define the purpose for the interview. Ask yourself, “Why am I interviewing this person? What do I hope to learn? What events or topics do I want to document?” Let your purpose determine appropriate questions for the interview outline.

Learn about the person you are interviewing and obtain a basic understanding of the events that shaped his or her life. A pre-interview visit may be a good way to obtain background information and determine if the candidate will interview well (see the “Pre-interview Questionnaire” in the “Resources” section, page 9). Good preparation demonstrates you are interested in the person, and it will help to develop trust.

Interview Outline

An outline of questions will help keep the interview focused on its original purpose. However, following an outline too strictly may disrupt the natural flow of ideas and thoughts and cause important information to be missed.

Begin the outline with general questions about the interviewee’s life: early years, education, marriage, children, career, and so on. Discussing familiar topics will put the interviewee at ease, build trust, provide context, and create a friendly atmosphere. Use open-ended questions that will encourage the person to talk freely and reflect on lessons learned. (See “Sample Interview Outlines” in the “Resources” section, pages 11–17.)

Recorder

A digital recorder is required (see “Standards for a Recording Device” in the “Resources” section, page 8, for minimal requirements). Become familiar with the recorder prior to conducting an interview. Ensure that:
• The quality level is at the highest setting (usually a stereo setting) available on the recorder.

• The recorder has sufficient power to last the entire interview; bring backup batteries.

• There is sufficient storage capacity available on the recorder.

• You have identified the optimal distance from which your equipment is capable of recording.

Invitation
When extending an invitation, explain why, when, and where you would like to meet. Inform the interviewee how long the interview may last. Invite the person to bring relevant photographs, documents, or small artifacts that may trigger memories that will enrich the interview. (See “Sample Interview Invitation Letter,” page 10, in the “Resources” section.)

Location
The location of the interview is extremely important. When deciding on a setting, select a location that will be comfortable for the interviewee and that is free of excessive noise and interruptions. A meetinghouse may be a good location. Wherever you meet, avoid phones, noisy clocks, traffic noise, heavy equipment, and noisy children. Arrive at the interview location with adequate time to set up, test the recording equipment, and minimize background noises.

Timing
It is best to record an interview when memories are fresh, because then interviewees will generally share more detail. Be sensitive to a person’s schedule and to the time of day. When possible, be sure the person you are interviewing is feeling good and is alert.

Recording an Interview

Pre-interview Instructions
Set the interviewee at ease by explaining some of the things you will do during the interview. Explain that you will be taking notes and making a word list of proper nouns. Test the recorder to ensure it is clearly capturing everyone’s voice from where each person sits, and explain that periodically you may check to see if it is functioning properly. Describe what you will do if the interview is interrupted, and inform the interviewee that a break can be taken whenever one is needed. Before you turn the recorder on, you may want to begin the meeting with a prayer.

Donation Agreement
Prior to the interview, or right after you are finished, ask the interviewee to sign a Church History Department Donation Agreement. This agreement gives the Church legal rights to preserve and use the recording. Instructions for filling out the donation agreement can be found in the back of this guide in the “Resources” section (see page 18). The
donation agreement can be downloaded from the forms section at lds.org/callings/church-history-adviser. When using the donation agreement for an oral history, write Oral history in the “Detailed description of everything you are donating through this agreement” field of the form. The “Past ownership of Donation Materials” field can be left blank.

Opening Statement
As recording begins, the interviewer gives an opening statement that includes who is at the interview, the date and location, and the purpose of the interview. For example: “My name is Felix Nash, and I am the Samoa Church history adviser. Today is May 27, 2010. I am interviewing Brett Jones in his home in Apia, Samoa. Brett is the manager of Church property in Samoa, and today we will be discussing his experiences with the tsunami that hit Samoa in 2009.”

Interviewer’s Role
Minimize the amount of time you speak and do not impose your opinions on the interview. Guide the conversation by following the interview outline, but don’t be too stringent. Be patient and let the interviewee share as much information as possible. Allow enough time for the interviewee to think about his or her responses.

Asking Questions
Referring to the interview outline, ask open-ended questions that can be responded to at length. Avoid questions that can be answered with short phrases or with “yes” or “no” responses. Use follow-up questions to fill in areas that need clarification or more detail. Avoid asking questions that deal with topics that may distract from the interview’s purpose or detract from the Spirit.

The first 15 to 20 minutes of an interview will set the tone. Begin each interview with questions that will put the interviewee at ease; often, personal background questions will do this.

Accuracy
Sometimes interviewees may misspeak or say something that is inaccurate or contradictory. Do not correct or contradict the interviewee in an argumentative way. Rather, ask for clarification. Restating the comment and asking if that is what was meant can be a good way to clarify without giving offense.

Word List
Write a list of important names and locations that may have unique spellings. When the interview is finished, review this word list with the interviewee for accuracy. A word list will help you in creating the cataloging worksheet and index. If possible, include the birth year and death year for any people who are mentioned in a significant way in the interview.

Language
Conduct the interview in the language that is most comfortable for the interviewee. When you do not speak that language, there are three options, each involving a competent translator:

• Simulcast—Every word is translated back and forth.
• Summary—The translator provides a brief summary of the interviewee’s response to each question.
• Reliance—In this model, you rely on the translator to understand the purpose of the interview and, without translating the responses from the interviewee, the translator simply verifies to you that the responses are adequate. The translator also asks follow-up questions when necessary.
With each method there is a trade-off between the amount of control you have as the interviewer and the length of time the interview takes. If possible, orient the translator before the interview so he or she can better assist in achieving your purpose. Interviews recorded in non-English languages do not need to be translated into English.

Length

In general, an interview should not last more than two hours. An interview may be less than two hours, depending on the circumstances and purpose of the interview. If you have reached two hours and there is still more that should be recorded, consider scheduling another appointment to continue. Multiple sessions are covered under the original donation agreement.

Collecting Other Records

Sometimes a photograph or an object is referred to during the interview. When this happens, ask if you may scan or photograph the item to include it with the oral history. Bringing an inexpensive but reliable scanner to the interview will allow you to scan a photograph or document before leaving.

For larger record collections, such as files, correspondence, journals, or photograph collections, ask the interviewee if he or she would be willing to donate the records to the Church or allow digital copying. If the person agrees, follow the instructions contained in Church History Guides: Collecting Records (available from the Church History Department).

Photograph of the Interviewee

A photograph of the interviewee is optional but can enhance the submitted oral history. Use the best digital camera available to you. Cell phones do not generally provide a preservation-quality photograph.

Processing an Interview

Processing an oral history makes preservation and future access possible. Processing is generally done by the interviewer and must be completed prior to submitting the oral history for preservation.

Case Files

As part of the processing, you will need to create a case file in which to store everything associated with the interview. You will actually create an electronic and physical case file for each interview. In the electronic case file you will place these three components:

1. The digital audio recording
2. A scan of the signed Church History Department Donation Agreement
3. An electronic version of the cataloging worksheet and index

You may include in this electronic folder other relevant documents, such as a digital photograph or a scan of the word list.

In an actual physical (paper) folder, place the following:

1. The original signed Church History Department Donation Agreement
2. A printout of the completed cataloging worksheet and index
3. The word list
4. Any other documents associated with the interview, such as the interview outline, research notes, and pre-interview questionnaire

Name the electronic folder and files according to the “Standards for Naming Electronic Folders and Files” document in the “Resources” section (page 21). Label the hard-copy folder in a similar manner. Store the electronic folder on a secure computer and the hard-copy folder in a safe location. The content of the folders belongs to the Church and will be transferred to the area Church history adviser when you are released.
Actual Recording

Soon after the interview is completed, copy the recording to the electronic interview folder on a secure computer. If possible, maintain the recording on the digital recorder as a backup until the Church History Department confirms receipt of the submission, and then delete it from the recorder.

Signed Donation Agreement

Without a signed agreement, the interview is unusable and of little value to the Church. Scan the signed agreement and place it in the electronic interview folder, and save the original in the hard-copy folder.

Cataloging Worksheet and Index

Complete a cataloging worksheet, available electronically from the forms section at lds.org/callings/church-history-adviser (see the cataloging worksheet example in the “Resources” section, pages 24–25). The worksheet describes important information about the oral history and makes future access possible. It will be sent to the Church History Department and entered into the Church History Library catalog. Unless an exception is approved beforehand, the cataloging worksheet must be completed in English, but it may also be completed in the language of the interview. If needed, others may be called to assist with the translation. Both language versions should be saved together in a single electronic file.

Included in the cataloging worksheet is an indexing template. Creating an index of the interview helps make the information more accessible. To create the index, break the interview into sections, with each section covering a particular topic. Using the interview outline is a good way to divide the interview into sections. Each section should cover no more than 15 to 20 minutes of the interview. For each section, write a brief description of the significant subjects and stories discussed (see the cataloging worksheet example in the “Resources” section, pages 24–25). Be sure to include specific names and locations. Typically, an index is one to two pages long. Write down the time-counter reading shown on the recorder when each section begins. Write the hour, minute, and second.

It is best for the interviewer to complete the cataloging worksheet soon after the interview, when memories are fresh.

Copy for the Interviewee

You may present a copy of the recording to the interviewee as a way of expressing appreciation for his or her participation.

Transcripts

Creating a transcript is not required because it is very time-consuming. For every hour of a recorded interview, it may take up to four hours to create a basic transcript, or about ten hours to create a thoroughly edited and reviewed transcript. If you have the resources and desire to transcribe interviews, consult with your Global Support and Acquisition contact for more information.

Submitting an Interview

When processing is complete, the electronic folder, containing all the corresponding files, is submitted to the Church History Department for preservation. Because the folder will be too large to email, use a recommended program to electronically transfer the folder and its files to the following email address: oralhistories@ldschurch.org (see “Instructions for Sending Large Electronic Files” in the “Resources” section, pages 26–28).

Before submitting the interview, ensure that the following files are contained in the electronic interview folder:

- Actual recording
- Signed Church History Department Donation Agreement
- Cataloging worksheet and index
- Additional files (if any)
Resources

Preparing and Recording

Standards for a Recording Device
Pre-interview Questionnaire
Sample Interview Invitation Letter
Sample Interview Outlines
  General Questions
  Ward or Branch Organization Leader
  Modern Pioneer
  Bishop or Branch President
  Mission President
Donation Agreement Instructions

Processing and Submitting

Standards for Naming Electronic Folders and Files
Oral History Cataloging Worksheet Instructions
Oral History Cataloging Worksheet Example
Instructions for Sending Large Electronic Files
Standards for a Recording Device
The Church History Department does not endorse a particular make or model of recording device; however, cost, durability, and reliability should be deciding factors.

Digital recorder requirements:
• Built-in USB connection
• Stereo recording capability
• Several hours of recording time
• Compact and easy to use
• Capable of recording in WAV and MP3 formats

Recording devices, batteries, and other supplies should be purchased using funds supplied by the area and are the property of the area.

A typical digital voice recorder
Pre-interview Questionnaire

Interviewee's full name:

Date and place of birth:

Father's full name:

Mother's full (maiden) name:

Place(s) raised:

Spouse's full name:

Date of marriage:

Number of children, if any:

Education (include institutions, degrees and majors, dates, and so on):

Employment history (include companies, positions, dates, and so on):

Date and circumstances of baptism:

Date and circumstances of spouse’s baptism:

Missions served (include places and years served):

Church callings as an adult, including units where served and approximate dates:

Participation in significant Church events:
Sample Interview Invitation Letter

January 22, 2014

Rafael J. Hernández
123 Any Street
Anywhere City, Peru

Dear Brother Hernández:

Recording the experiences of mission presidents who have served in Peru is an important part of documenting the history of the Church in Peru. As the Peru Church history adviser, I am interviewing individuals who have had this significant experience. Interviews will be submitted to the Church History Department in Salt Lake City for preservation. This project has been endorsed by the Area Presidency. I want to include you in this project.

An interview lasts approximately one to two hours. We can meet at your home or at the La Molina meetinghouse. You may want to prepare by making a few notes about your experiences as a mission president. Also, if you have records or photographs related to your experiences, you may want to bring them, as they may help you remember specific information.

I would be happy to discuss this project with you in greater detail. If you are willing to participate, please contact me at 123-456-7890 or by email at mkh@com.com.

Sincerely,

Marcus K. Harris
Peru Church History Adviser
Sample Interview Outlines
Following are sample interview outlines that may assist you in creating your own outlines. Additional sample outlines are available at lds.org/callings/church-history-adviser. These outlines are meant to be adapted to the person you are interviewing, based on the information you gather during your pre-interview research. It often works best to subdivide your outlines into topics. The “General Questions” page contains questions that are applicable to almost any interview.

Remember that it is not necessary to ask all of the questions in these suggested outlines or in your outline. Other important topics that should also be discussed will likely arise in the course of the interview. Be flexible and be open to the Spirit’s guidance as you record Church history.

Note: Blank lines in the outlines that follow stand for the location that is being discussed, the place where the interviewee lives, or a Church position held by the interviewee.
General Questions

Personal Background
1. Tell me about the following:
   a. Where you were born and raised
   b. Your parents, siblings, spouse, and children
   c. Your education and career

Conversion to the Church
1. What was your religious background before you joined the Church?
2. How did you hear about the Church, and what were your first impressions?
3. Were there any doctrines that were difficult to understand or accept?
4. Who were the missionaries that taught you? Were there any language barriers?
5. When did you first think that what you were learning was true, and what most influenced that conviction?
6. When and where were you baptized? Who baptized and confirmed you?
7. What was the reaction of your family and friends?
8. Has there ever been a time when you stopped coming to church? If so, what influenced you to return?
   If not, what has helped you remain faithful and active?

Callings
1. Describe your call to serve as __________________________ (bishop, stake president, Relief Society president, and so on).
   a. When were you called, and what was your reaction?
   b. What events in your past best prepared you for this calling?
   c. How did you select your counselors? Describe your counselors.
2. Describe the kind of training you received.
3. What goals do you have in your current calling as __________________________? Describe your efforts to accomplish these goals.
4. Describe how your organization functions.
5. How has this calling affected your family relationships?

Conclusion
1. Describe any significant events in __________________________ (location) that you have experienced, such as the visit of the prophet, the creation of a stake, a temple dedication, a natural disaster, and so on. What impact did these events have on your testimony?
2. What do missionaries and Church leaders need to know about this country—such as its history and culture—to better understand the people?
3. What are the blessings that have come into your life as a result of your Church membership?
4. Are there major issues that we have not covered in this interview?
5. How would you feel about ending the interview with your testimony?
**Ward or Branch Organization Leader**

**Leading in Your Local Area**

1. Describe the differences between the way your culture understands the roles of men, women, youth, and children and the way the Church defines these roles. How does this impact the way you lead?
2. Describe conditions that impact your ability to lead in the Church (for example, transportation, finances, distance, work, and so on).
3. What are the greatest challenges facing the members you lead?

**Issues for Organizations**

Depending on which organization the person you are interviewing is leading, ask him or her to describe issues and challenges related to the following:

- **Relief Society**
  - Single mothers and women
  - Sunday and other meetings
  - Welfare assistance/service
  - Visiting teaching
  - The semiannual women's broadcast

- **Young Women**
  - Dating practices and marrying in the Church
  - The semiannual women's broadcast
  - Young Women camp
  - Young Women values in your society and culture

- **Primary**
  - Primary activities
  - The yearly Primary program in sacrament meeting
  - Reverence
  - Children from less-active families coming to Primary

- **Young Men**
  - Dating practices and marrying in the Church
  - Mission preparation
  - Scouting or Duty to God program
  - General conference priesthood session

- **Elders Quorum or High Priests Group**
  - Development of righteous husbands and fathers
  - Attitudes toward marriage and the treatment of women
  - Home teaching
  - Sunday lessons

- **Ward or Branch Mission**
  - Member-missionary work
  - Working with the missionaries
  - Common misperceptions about the Church
  - Acceptance of the restored gospel
  - Success stories

- **Sunday School**
  - The curriculum in your society and culture
  - Teacher preparation
  - Attendance
  - Specialized classes, such as temple preparation, family history, marriage and family relations, and so on
Beginnings of the Church in Your Local Area

Describe the following, and relate these topics to your personal experiences:

1. Meeting places (from personal apartments or rented space to your own meetinghouse)
2. Missionaries or other Latter-day Saints who helped establish the Church in ________________ (location)
3. The first local Church members called to be leaders
4. Opposition to the Church
5. Establishment of the first branch, ward, stake, and so on
6. Establishment of a local mission and missionary work
7. Changes you have noticed as the Church in ________________ (location) has grown
   a. Member participation and levels of activity in the Church
   b. People falling away from the Church
   c. Key people who joined and strengthened the Church in ________________ (location)
8. Establishment of Church programs, auxiliaries, and organizations
   a. Relief Society
   b. Young Men, Young Women, Primary
   c. Seminary and institute
   d. Family history
   e. Home and visiting teaching
   f. Church welfare
   g. Perpetual Education Fund
   h. Social activities and local LDS traditions (for example, Pioneer Day)
   i. Other
9. First temple trips, the sacrifices made to travel to the temple, and the difference it made when people were able to go to the temple
10. Dedication of a local temple
11. Translation of the scriptures and other Church literature into your language
12. Visits of General Authorities and other Church leaders
Bishop or Branch President

Your Ward or Branch
1. Describe the size and composition of your ward.
2. Discuss the commitment of members (men and women) to living the gospel (for example, attending meetings, going to the temple, serving in callings, doing home and visiting teaching, and so on).
3. Describe the major achievements of your ward and bishopric.
4. What are the major challenges facing you as a bishop? facing your ward?
5. Describe the social activities you have in your ward.

Welfare Issues
1. What socioeconomic factors affect members of your ward?
2. How many requests do you receive for assistance?
   a. What kinds of requests are they?
   b. What training have you received to help you respond to these requests?
3. Does your ward have any special programs for education or employment training?
4. How does the Relief Society help meet the temporal needs of the members?

Youth and Young Adults
1. As a bishop, what are you most concerned about when you think of the youth and young adult members in your ward? Discuss the following:
   a. Seminary and institute
   b. Young people serving in callings and going on missions
   c. Returned missionaries
   d. Marriage possibilities in the Church

Missionary Work
1. What do you know about the beginning of the Church in this area?
   a. Who were some of the pioneers?
   b. What stories have you heard about the beginning of the Church here?
2. What is the public perception of the Church here in _____________________________ (location)?
3. What types of people are joining the Church here in _____________________________ (location)?
4. Discuss how you do missionary work in your ward.
   a. Member involvement
   b. Use of full-time missionaries
5. Discuss convert retention.

Temple and Family History Work
1. Describe the challenges your members face in attending the temple.
   a. How many of your members have been to the temple?
   b. How many carry current temple recommends?
2. Describe what family history work is going on in your ward.
   a. What tools (computers, software, books, records, and so on) do you have access to?
   b. How many people participate?
Mission President

The Call
1. Looking back, how were you prepared for your call?
2. Describe the reaction of your family to your call.
3. Describe the events and your feelings from the time of your call until you arrived at the mission, including the new mission presidents’ seminar.

Mission Background
1. Describe the following about your mission:
   a. Mission boundaries
   b. People: number of members, language and literacy, education, socioeconomic level, and so on
   c. Missionaries: locals, North Americans, sisters, couples; their strengths and weaknesses
   d. What do you know about the beginning of the Church in this mission?
      i. Who were some of the pioneers?
      ii. What stories have you heard about the beginning of the Church in the area?
2. Describe the religiosity of the people and what doctrines were easiest and hardest to accept.
3. Describe any legal or governmental restraints on missionary work.
4. Describe the profile of converts: language and literacy, education, socioeconomic level, and so on.
5. What was the public image of the Church in your mission? Were there strong anti-Mormon influences?
6. What do missionaries and Church leaders need to know about this country—such as its history and culture—to better understand the people?

Mission President’s Perspective
1. Role as administrator
   a. Describe your feelings about the state of the mission and your responsibilities when you arrived.
   b. What did you emphasize with missionaries and members?
   c. How were you able to use the talents of senior couples, sister missionaries, and elders?
   d. What were your main administrative challenges and successes?
2. Missionary work
   a. Describe the impact of Preach My Gospel or prior proselytizing approaches.
   b. What types of missionary work did your missionaries participate in (tracting, street boards and contacting, seeking member referrals, and so on)? What methods were most effective?
   c. How did you minister to the missionaries?
   d. How did the people respond to the Book of Mormon?
   e. What kinds of challenges were there with local missionaries working with missionaries from other parts of the world?
   f. What role did the temple play in motivating the converts?
3. Member work
   a. Discuss your experiences with creating new districts.
   b. Discuss the opening of cities or areas (or closing of cities or areas).
   c. How did you use your counselors? What were their names, and how did you select them?
   d. Discuss your interaction with local stake and district presidents in the balanced efforts of missionary and member work.
   e. Talk about local leadership and training of local leaders.
4. Discuss your experience in some of the following categories:
   a. General Authority mission tours
   b. Humanitarian projects and missionary service experiences
   c. Perpetual Education Fund
   d. Seminaries and institutes
   e. Physical facilities
   f. Temple recommend interviews

Conclusion
1. Talk about your contact and relationship with Church leaders, including the Area Presidency and Area Seventies.
2. Describe how you saw the hand of the Lord establishing the Church in ________________ (location).
3. What steps need to be taken for the Church to progress (or continue to progress) here?
4. Are there any other spiritual experiences that you would like to relate? pioneer stories?
5. What other lessons did you learn on your mission?
6. Would you be willing to end with your testimony?

Perspective of Mission President’s Wife
1. Describe the impact of this calling on your family.
2. Discuss the role of the mission president’s wife.
3. Describe your interaction with the missionaries.
4. Describe your interaction with the local Church members.
5. What did you learn on your mission?
6. How would you feel about ending with your testimony?
Donation Agreement Instructions

Note: All examples are fictional.

IP code. Leave blank. This will be filled in by others later.

Donor’s name(s). Write the family name, a comma, and then the given name(s). Example: “Monson, Thomas Spencer”

Phone number(s). Include information that will allow you and others to contact the donor later by phone.

Donor’s address(es). Include information that will allow you and others to contact the donor later by mail.

Email address(es). Write the email address(es) of donors. Be sure to verify the accuracy of the email address(es).

Detailed description of everything you are donating through this agreement. List the Donation Materials being given, indicate whether they are originals or copies, and indicate whether they include any oral history. This is to be a detailed summary, not a recounting of every element of every item.

Example 1: One large bundle of letters, ten volumes of journals, and a box of photographs. These are all originals.

Example 2: A collection of four letters written to Maria Escobar. The first letter is from Spencer W. Kimball, June 3, 1967. The second is from N. Eldon Tanner, October 25, 1963. The third and fourth are both from Gordon B. Hinckley, July 29, 1976, and September 1, 1976. These are photocopies.

Example 3: Three photo albums containing several hundred photographs.

Note: The second example is more detailed than the first or third because there are only a small number of items.

Biographical information of the person (or people) who created the Donation Materials. Give the biographical information of the creator. Remember, the creator and the donor may not be the same person. Include background information, relationship to Church history, or anything that would be useful when the Donation Materials are cataloged. Include birth and death dates, if applicable.

Example 1: Jose Amarillo (1910–1988) was the first president of the Madrid Spain Stake (period of service: 1970–1979). He was one of the first five people to be baptized in Spain. Other individuals mentioned in the materials include Jorge Sanchez, the first president of the Madrid Spain Temple.


Example 3: Alexandra Azarov (1954–2013) served as a district missionary for over 20 years in the Moscow Russia District. She was one of the first members of the Church in Moscow. She was a mother figure to hundreds of missionaries who served in Moscow. Her albums contain photos of these missionaries.

Note: This information will be useful for filling out the cataloging worksheet later. When you fill out the cataloging worksheet, you may choose to include a few more relevant and significant details.

Past ownership of Donation Materials (not applicable for oral histories). Describe, as much as possible, the past ownership of the Donation Materials. Include the circumstances surrounding the creation of the materials. Also include the date when and the location where the Donation Materials were made.
Example 1: Created by the donor’s father throughout his adult life and passed to the donor upon his father’s death in 1988. All materials were created in Seville, Spain.

Example 2: Created by the donor in 1965 while serving in the Andean Mission.

Example 3: Alexandra Azarov lived across the street from Ivan Ashkenazy. Azarov had no children. She became close friends with Ashkenazy. Before her death, she asked if he would be the custodian of her photographs and find a home for them. She did not mention this in her will. After her death in 2013, Ashkenazy walked over to her home when her niece was cleaning it out. He noticed that she had thrown away the photograph albums. He asked the niece if he could have them. She agreed to give him the albums, which are being donated.

Note: The past ownership of examples 1 and 2 are easy to understand. Example 3 is more difficult. If you have any doubt that the donor has the right to donate the items, you should consult with a staff member of the Global Support and Acquisitions Division.

Additional information (if any). List any additional information or arrangements relating to the Donation Materials. This field could apply:

- When the donor has requested a digital copy of the material.
- When the donor has requested that some or all of the material be restricted from general access, and for how long. Consult with the Global Support and Acquisitions Division before agreeing to any access restrictions.
- When the donor has agreed to loan the records to the Church so a copy can be made.

Note: If the donor is very familiar with the material, ask if it contains any sacred, private, or confidential information. Record any response in this section.

COP’s Use of the Donation Materials. This section describes what the Corporation of the President (COP) will be able to do with the donated materials. Become familiar with the examples given in this section, and contact Global Support and Acquisitions Division if you have questions.

Your Use of the Donation Materials. This section describes what the donor can do with the materials once he or she signs this agreement.

Your Agreement. Before the donor signs the document, make sure he or she understands the agreement contained in this section. If you have questions, consult your contact at the Global Support and Acquisitions Division.

Since you are acquiring the materials in behalf of the Church History Department, you are the COP representative. Be sure names are written and signed and that the date is included on the appropriate line.

Note: If a donor is not sure he or she is authorized to sign, contact the Global Support and Acquisitions Division.
Standards for Naming Electronic Folders and Files

When submitting a completed interview to the Church History Department, place all electronic files in a single folder and use the following naming standards.

Folder Name

The interviewee’s surname followed by a comma and then the given name should be the name of the electronic folder. For example, if Marta Santos was interviewed, the name of the folder should be “Santos, Marta.”

File Names

For every file in the folder, use the folder name as the prefix, followed by an underscore, and then a word indicating what kind of file it is. Audio and image files should also include a five-digit sequential number beginning with 00001 if there is more than one. Examples follow.

Required Files

- Santos, Marta_agreement.pdf
- Santos, Marta_worksheet.doc
- Santos, Marta_audio.mp3

Optional Files

- Santos, Marta_photo_00001.jpg
- Santos, Marta_photo_00002.jpg
- Santos, Marta_word_list.doc

Multiple Sessions

Multiple recording sessions from the same interview should be named as follows:

- Santos, Marta_audio_00001.mp3
- Santos, Marta_audio_00002.mp3
- Santos, Marta_audio_00003.mp3

More Than One Interviewee

When interviewing two people, name the files according to the following pattern:

- Santos, Marta and Ramirez, Paula_audio.mp3

When interviewing several people, use the name of the group in the file names:

- First-generation members_audio.mp3
Oral History Cataloging Worksheet Instructions

The cataloging worksheet (available electronically in the forms section at lds.org/callings/church-history-adviser) is used to create the official entry in the Church History Library catalog for an oral history. It is important to include details that will make the oral history easy to find for researchers.

The index section of the worksheet is designed to provide an outline of the significant topics discussed in the interview and the corresponding time-counter readings. The time-counter readings can be noted from the display on the recording device or, if you review the interview on a computer, from the time counter provided by the software.

Once completed, the worksheet should be included as an electronic file in the electronic interview folder.

Below are explanations regarding the elements found on the worksheet. See also the filled-out example worksheet that follows. Translated text is included in brackets.

Folder name [Folder name]. See “Standards for Naming Electronic Folders and Files” on page 21. (Example: Santos, Marta)

CHL call number [CHL call number]. The Church History Library will assign a call number. This call number will then be sent back to the interviewer, who should add the call number to his or her copy of the worksheet for future reference. (Example: OH 4219)

Date of interview [Date of interview]. Give the day, month, and year when you recorded the interview. (Example: 27 November 2013)

Church area [Church area]. Name the Church area where you live. (Example: Europe East Area, South America South Area)

City and country where interview was recorded [City and country where interview was recorded]. List the city, state or province (if applicable), and country where you recorded this interview. (Example: Mexico City, Mexico)

Format of the recording [Format of the recording]. Identify the format in which the interview was recorded. (Example: MP3 or WAV)

Principal language of the interview [Principal language of the interview]. List the primary language in which the interview was conducted.

Other languages [Other languages]. List any other languages that were spoken during the interview.

Is there a signed Church History Department Donation Agreement? Put “Yes” or “No” in the space to the right of the question. (Remember that a signed donation agreement is required to submit the interview.)

Interviewer(s) (family name or surname, given names) [Interviewer(s) (family name or surname, given names)]. Give family name or surname, followed by all given names. List multiple interviewers if appropriate. (Example: Harris, Marcus)

Interviewee(s) (family name or surname, given names) [Interviewee(s) (family name or surname, given names)]. Give family name or surname, followed by all given names. List multiple interviewees if appropriate. (Example: Lopez, Alicia Victoria Solis de De Leon)

Birth date [Birth date]. List the birth date of the interviewer(s) in this format: DD MMM YYYY. (Example: 29 Jul 1976)

Birth date [Birth date]. List the birth date of the interviewee(s)
in this format: DD MMM YYYY. (Example: 07 Sep 1929)

Contact information for interviewee(s) [Contact information for interviewee(s)]. List all phone numbers, an email address, and a place of residence. (Example: Phone numbers: Home 0234-549-9877, cell 0234-465-5458. Email address: devega77@qv.com. Residence: Calle Zokolo 240, Mexico City, Mexico 9870)

Translator (family name or surname, given names) [Translator (family name or surname, given names)]. If a translator was present during the live interview, give this person’s name. (Example: Sosa, Maribel)

Index [Index]. Break the interview into multiple sections, one section for each general topic, and write a summary of what was discussed in that section. Often the interview outline can serve as a guide for dividing the interview into sections. Sections should be no longer than 15 to 20 minutes. (See example on pp. 24–25.)

Time [Time]. Give the time-counter reading to indicate when each section begins on the recording. List hour, minute, and second. Record the time when you begin asking the question, not when interviewees begin their response. (Example: 1 hour, 12 minutes, and 6 seconds would be listed as 01:12:06)

Summary Paragraph [Summary Paragraph]. Begin the first sentence, “Discussion of ____ (describe the scope of the interview).” If necessary, begin the second sentence, “Contains ____ (list important section from the index).” The third sentence, if desired, should begin, “Includes ____ (list significant stories or topics you want to bring attention to).” Be sure to include important names, dates, and places. Use the style guide that accompanies the worksheet to help you use correct formatting.

Sacred, Confidential, or Private Information [Sacred, Confidential, or Private Information]. Put “Yes” or “No” in the box to the right of each statement to indicate whether or not it applies. (See example on p. 25.)

Other Useful Information (optional) [Other Useful Information (optional)]. In this optional space, indicate any other information that may be relevant.

Worksheet Creator [Worksheet Creator]. Give the name of the person who created this worksheet as well as the date of completion. (Example: Harris, Marcus Kevin; 12 Sep 2013) Also give the name of the person who translated the worksheet as well as the date the translation took place. Finally, give the name of the person who edited the worksheet as well as the date the edit took place.
Oral History Cataloging Worksheet

General Information

Folder name: Santos, Marta

Date of interview: 15 August 2009

Church area: Central America

City and country where interview was recorded: San Marcos, Guatemala

Format of the recording: WAV

Principal language of the interview: Spanish

Other languages:

Is there a signed Church History Department Donation Agreement? Yes

Interview Participants

Interviewer(s) (family name or surname, given names): Harris, Marcus Kevin

Birth date: 29 Jul 1976

Interviewee(s) (family name or surname, given names): Lopez, Alicia Victoria Solis de De Leon

Birth date: 07 Sep 1913

Contact information for interviewee(s)

Phone numbers: 0234-549-9788

Email address: Lopez77@ldslatin.org

Residence: Calle Zokolo 240
San Marcos, Guatemala 9870

Translator (family name or surname, given names):

Index

<table>
<thead>
<tr>
<th>Brief Description</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>00:00:00</td>
</tr>
<tr>
<td><strong>Personal background:</strong> Lopez describes her birth and childhood in San Pedro Sacatepequez, Guatemala; her early education; and her marriage to Alfonzo De Leon (1934).</td>
<td>00:01:33</td>
</tr>
<tr>
<td><strong>Conversion to the Church:</strong> Lopez discusses her first meeting with the missionaries (Dec 1956), her struggles with the Word of Wisdom and opposition from family members, how she obtained a testimony, and her baptism in a lake near San Marcos, Guatemala (05 May 1957).</td>
<td>00:19:34</td>
</tr>
<tr>
<td><strong>Husband's conversion:</strong> Lopez describes the struggles of her husband, Alfonzo De Leon, to understand her commitment to the gospel and his actions to undermine her efforts to serve in the branch. Finally his heart was softened when he saw her determination to serve the Lord and its impact. She describes meeting with the missionaries, Elder Mark Jones and Elder Emilio Messi, and Alfonzo's conversion and baptism (24 Mar</td>
<td>00:35:54</td>
</tr>
</tbody>
</table>
Temple sealing: Lopez describes saving money and planning the trip to Arizona to be sealed in the Mesa Arizona Temple. The 3,200-km trip took three days to drive. Lopez describes miracles that happened along the way and her feelings at seeing the temple for the first time. She and her husband were sealed on 24 Mar 1965. Lopez also describes other temple trips and her interest in family history work.

Supporting her husband as a bishop of the San Pedro Sacatepequez Ward (1992–1995): Lopez describes the San Pedro Sacatepequez Ward and mentions briefly several ward members. She tells of her husband’s call to be the bishop (08 Sep 1992) and his concerns. She describes several experiences while her husband was the bishop such as counseling couples with marriage trouble, caring for the poor, and supporting missionary work.

Feelings about the forthcoming Quetzaltenango Guatemala Temple: Lopez shares her feelings about her writing and poetry. Shares her testimony. Describes what a miracle the forthcoming Quetzaltenango Guatemala Temple is and how overwhelmed with joy she is to have a temple so close.

End Time

Summary Paragraph

Discussion of Lopez’s life and Church experiences in San Pedro Sacatepequez, Guatemala, from 1913 to 2009. Contains a discussion of Lopez’s LDS conversion and her baptism in a lake near San Marcos, Guatemala (1957); the conversion of her husband, Alfonzo De Leon (1961); their sealing in the Mesa Arizona Temple (1965); other temple trips; supporting her husband as a bishop of the San Pedro Sacatepequez Ward (1992–1995); her writings and poems; her testimony; and her feelings about the forthcoming Quetzaltenango Guatemala Temple (2009).

Sacred, Confidential, or Private Information

<table>
<thead>
<tr>
<th>Does the interview contain any of the following?</th>
<th>Yes/No</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports of confessions, Church disciplinary councils, or sensitive matters shared in nonpublic Church settings (such as leadership meetings)</td>
<td>Yes</td>
<td>01:11:02</td>
</tr>
<tr>
<td>Financial records that document the Church’s income (including tithing and other donations), expenditures, and budgets</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Personal financial information, including information about welfare assistance</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Specific personal health information</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Information that, if released, would violate applicable data privacy laws (for example, addresses, phone numbers, email addresses, birth dates, criminal history, sexual history, or ethnic background)</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Specific wording or details regarding a temple’s interior, temple rites or ceremonies, the garment, or other temple clothing</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Other Useful Information (optional)

Worksheet Creator

Worksheet created by: Harris, Marcus Kevin
Worksheet translated by:
Worksheet edited by: Jones, Samantha

Date: 12 Sep 2013
Date:
Date: 03 Dec 2013
Instructions for Sending Large Electronic Files

There are several Internet tools that can help transfer large files. However, when you use tools that are not approved by the Church, you may risk exposing the files to third parties that could cause problems. FileSend is a tool for transferring large files that has been approved by the Church. It can be found at filesend.ldschurch.org. The following instructions pertain to the use of FileSend.

1. Open an Internet browser, and type filesend.ldschurch.org in the address bar.

2. Nonemployees should use the Limited Version on the right side of the screen. Church employees should use their LDS Account to access the Full Version.

3. In the nonemployee view, shown below, type your first name, last name, and email address. The corresponding screen for employees looks slightly different, and entering this information is unnecessary.

4. Type oralhistories@ldschurch.org in the recipient’s email address box.

5. Type the name of the folder being transferred in the message box (for example, “Santos, Marta”). All the files associated with the interview should be organized within a single folder. See “Standards for Naming Electronic Folders and Files” (p. 21).

6. Click on the Upload Files button.
7. Navigate through the file box, displayed on the left, to locate the folder where the oral history to be transferred is stored.

8. Highlight the desired folder and click the single right arrow, as shown below, to add the folder to the transfer queue box. Do not send more than one interview at a time.

9. Once the folder has been moved over to the transfer queue, click on the **Start Upload** button at the bottom of the box. The process of transferring the folder will begin.
10. After the folder has been uploaded, click **Finish and Send Files**.

11. A new screen appears indicating that the transfer has been successful. You will also receive an upload confirmation by email.