

**DRAFT GUIDELINES FOR THE NKOSI  
ALBERT LUTHULI ORAL HISTORY  
COMPETITION FOR TEACHERS AND  
LEARNERS**



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## **Message from the Director-General of Basic Education**

This guidelines book aims to support both teachers and learners in their oral history projects. It promotes the understanding and implementation of oral history methodology in the classroom context.

The primary purpose of these oral history guidelines is to assist teachers and learners in developing viable oral history projects for the National Curriculum Statement and the Nkosi Albert Luthuli Oral History Competition.

The National Curriculum Statement has provided a valuable space for the teaching and learning of oral history from Grade R-12 as the curriculum promotes the teaching of an inclusive history and the use of different historical sources in history teaching and learning. The National Curriculum Statement also attaches great importance to the infusion of human rights and Indigenous Knowledge Systems (IKS) in the curriculum.

The Department of Basic Education has been co-ordinating the Nkosi Albert Luthuli Oral History Competition for Grades 9-11 for the past five years. Learners and educators have supported the project with great enthusiasm as the quality of entries from provincial competitions continues to improve

Different adjudicators have, in the past three years, identified similar areas that need improvement. These areas are;

- The selection of topics
- The role of the teacher in the oral history research project

- The importance of background research before undertaking the oral history research (interviewing)
- The inability of some learners to put selected oral history topics in a historical context
- Transcribing
- Presentation of research findings
- The identification of interviewees
- The use of technology in oral history research (DVDs, video footages and photographs)

These guidelines also deal with these challenges by offering advice and guidance.

It is hoped that the oral history guidelines would add value to your research projects and strengthen the application of oral history methodology across the curricula.

**Director-General**

**Department of Basic Education**

**2010**

## Chapter 1

### What is Oral History?

The Step-by-Step Guide to Oral History defines oral history as the systemic collection of living people's testimony about their own experiences. Oral history is not **gossip**, **hearsay**, or **rumour**. **Oral historians** attempt to **verify** their findings, **analyse** them, and place them in an accurate **historical context**. Oral historians are also concerned with **storage** of their findings for use by later scholars.<sup>1</sup>

The explanation further states that the interviewee recalls an event for an interviewer who records the recollections and creates a historical record.

Paul Thompson, a noted historian clarifies the role of oral history when he argues "oral history allows the original multiplicity of standpoints to be recreated. A much more rounded, realistic and fair reconstruction of the past can be arrived at by calling the subjugated voices to talk back and rectify the dominant accounts of the past contained in archival sources."<sup>2</sup>

Oral history appears in two forms. The first form is called **oral testimony** because it is the first hand or eye-witness account of what a person has seen, done or heard in the past.

Secondly, **oral tradition** that is passed down by word of mouth from generation to generation is another source of oral history. Oral tradition is not contemporary.<sup>3</sup>

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<sup>1</sup> Judith Moyer, Step-by-Step Guide to Oral History,, [http://do.history.org/on\\_your\\_own/toolkit/oralHistory.html](http://do.history.org/on_your_own/toolkit/oralHistory.html), 1999.

<sup>2</sup> Katie Mooney, Why is Oral History important?, article in Oral History Roundtable for Gauteng, hosted by the Department of Education and the Wits History Workshop, (29-30 August 2005), pp.9-13.

<sup>3</sup> John Tosh, The Pursuit of History, (Longman, London & New York, 1991), p.206.

Genealogies and praise songs of past amakhosi/inkosi/kgosi in indigenous societies are examples of oral tradition.

Oral tradition is less detailed and brief as in most cases it dates back to 300-400 years or more. The oral historian is expected to extract the motive.

As P. Thompson stated earlier, it is through oral history that the voices of the marginalised could be heard as oral history records the achievements, challenges and failures of ordinary people (workers, the landless, the youth, women and the aged) who normally do not find a space in history.

It is also relevant in the reconstruction of previously subjugated countries where the oppressed were not allowed to write their histories from their perspectives. It thus plays a crucial role in the reconstruction of transitional societies.

In the South African context, Oral History has been used to challenge/ counter stereotypes such as people were always divided on the basis of ethnicity and race, the “Empty Land” myth which justified land occupation by Dutch colonists, colonial historiography which distorted the contribution of indigenous and Black communities to South African history and exaggerated the role of colonialism in Africa, presenting it as a civilising mission.

On the other hand, social historians have used the Oral history methodology to research and write about the daily experiences of working class and uprooted communities in South Africa (the example of this is the Alexandra Oral History Project). The South African Democracy Education Trust (SADET) Oral History Project on the history of the liberation struggle recorded the previously excluded voices of South Africans and helped later scholars to give fresh interpretations of the past.

Another role of history is to promote national unity and reconciliation. The History and Archaeology Report of the South African History Project (updated 2002) states that

history could help the nation to understand “How has South Africa come to where it is today? How do we understand the growth of life and societies here? What can history bring to the understanding of life and societies here? History provides a usable past to understand the present. This understanding helps South Africans to work together and build a peaceful nation”.<sup>4</sup>

## **Chapter 2**

### **Preparing the ground for oral history research**

Both teachers and learners are requested to take into account the following factors;

- i. Read all the topics and then assess whether you have enough sources for the chosen topic. Learners tend to choose a popular topic and thereafter quickly run out of sources. Make sure that you are interested in the topic and you can find both written and oral sources in your immediate environment. Decide your research goals. Do not be disappointed when your goals change in the process, keep your focus.
- ii. Take into account the budget, equipment and time frames for the project. Do not put yourself in a situation where you should travel long distances in order to find interviewees.
- iii. Conduct background research (use non –oral sources such as newspapers, books and magazines). This is critical, as you cannot have insight to formulate good questions without conducting background.
- iv. How will you select the interviewees? This question is largely answered by your research goal. What do you want to achieve?
- v. Select potential interviewees.
- vi. Conduct interviews.

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<sup>4</sup> Report of the History & Archaeology Panel to the Minister of Education, 2002, p.7.

In the conduct of the interviews you should note the following **technical points**;

- i. Assemble your equipment (notebook, pens, tape recorder etc). Choose the equipment you can afford.
- ii. If you choose a tape recorder, make sure that you have new and spare batteries for the tape recorder and sixty-minute tapes that screw together.
- iii. Use an external microphone for sound quality. This also applies to the video.
- iv. Choose a quiet spot and avoid areas with crying babies, barking dogs and loud noise from the traffic or pedestrians.
- v. Compile a list of questions. The questions will help you to start the interview and remain focused. Additional questions could, however, be asked on the spot.
- vi. Practice interviewing. You can do this exercise with your classmate or family member.

### **Group interviews**

Educators and learners can organise group interviews. This approach enables many people to be interviewed at the same time. This is however a challenging approach which requires a lot of concentration and should be ideally videotaped in order to identify each speaker.

Group interviews bring out diversity as people remember the past differently.

### **Protocols to observe when interviewing for the oral history project.**

Most people are working during the week and they have limited time for interviews. Make an appointment and verify it two days before the actual date. The interviewer is the one who needs information from the interviewee and you should arrive on time.

The following points should also be noted;

- i. The interviewee must clearly understand the purpose of the interview and how you intend to use it. He/She should understand that the interview is not a private conversation.
- ii. Start each recording with a statement of who, what, when, and where you are interviewing.
- iii. Listen actively and do not interrupt the interviewee.
- iv. Do not be judgemental- it is not your life.
- v. Ask one question at a time.
- vi. Allow the silences and record them during the interview. Silences also give the interviewee an opportunity to recall and deal with their emotions.
- vii. Ask follow up questions.
- viii. Ask open questions in order to get detailed answers.
- ix. Start with less probing questions eg biographical questions before moving to more probing questions. This should be gradual.
- x. Observe the mood of the interviewee. Some questions can be hurtful. Allow the interviewer to recover or re-phrase the question. If he/she wants to stop the interview, respect his/her wishes.
- xi. The interview session should not be more than one to two hours in length.
- xii. Observe the fatigue levels and allow the interviewee to take a break if necessary.
- xiii. Use photos as initial prompts to stimulate memory. A picture of a Second World War soldier in action could only stimulate a conversation at the beginning. Remember, photographs are also subjective, as the photographer does not capture everything.
- xiv. Keep photographs protected by stiff cardboards in envelopes.
- xv. Label borrowed artifacts.
- xvi. Return the originals to interviewees and keep copies of artifacts and photographs.



- xvii. Label and number the recording immediately after the interview. The interviewee's surname and initials, eg Ramusi, N. the date and location that the interview was conducted.
- xviii. Ask the interviewee to sign the release form before leaving and write a thank you note. The release form is important for your project as shows that you have gained the information through correct channels.
- xix. Write your field notes immediately after each interview session. Field notes include all matters that you have noted during the interview and those you think require a follow up, like the names of other potential interviewees mentioned by your oral source.
- xx. Return a copy of the transcript to the interviewee before it is used for your project. The interviewee has right to check the transcript and make corrections.
- xxi. Make copies of all the work and give them accession numbers eg 102/10.
- xxii. Develop a storage system.
- xxiii. Analyse the interview. Verify facts; compare your results with the goals of your research. Did you get what you want/need? Do you have further questions? Any improvements from your side?
- xxiv. You can request another interview, if necessary.

You should however remember that **multiple** interviews are important as they help you to get different perspectives. Oral history, like all histories is composed of contesting narratives. People remember differently and they have different experiences in the same period. Learners are expected to interview 4-5 people for the Nkosi Albert Luthuli Oral History Competition. A single interview is just not enough.

### Chapter 3

#### Oral History Project release form

The Department of Basic Education has entered into an agreement with the South African History Archives (SAHA). SAHA will archive and digitise the portfolios of the Nkosi Albert Luthuli Young Historians' Award. The material will then be available to students, teachers and researchers. Copyright of the Nkosi Albert Luthuli Competition rests with the Department of Basic Education.

The following release form should be used for the Nkosi Albert Luthuli Oral History Competition:

#### Oral History Project Release Form (On school letterheads)

I, \_\_\_\_\_, hereby give and grant to the (name of the competition)  
(interviewee)

the absolute and unqualified right to the use of my oral history memoir conducted by

\_\_\_\_\_ on \_\_\_\_\_  
(interviewer) (date)

the purpose of this project is to collect oral testimonies of a particular period or event in history as part of the Nkosi Albert Luthuli Oral History Competition. This project falls under the Department of Basic Education.

I understand that these interviews (tapes and transcripts) will be deposited in the South African History Archives (SAHA) for the use by future students, educators and researchers. Responsibility for reproduction, distribution, display, and the creation of derivative works will be at the discretion of the Department of Basic Education and the South African History Archives (SAHA). I also understand that the tapes and transcripts may be used in public presentations including, but not limited to, books, audio or video documentaries, slide-tape presentations, school exhibits, articles, or presentation on the websites of the Department of Basic Education and the South African History Archives.

In making this contract, I understand that the copyright of the Nkosi Albert Luthuli Oral History Competition material rests with the Department of Basic Education. This gift, however, does not prevent any use that I myself want to make of the information in these transcripts and recordings.

\_\_\_\_\_  
Signature of the interviewee

\_\_\_\_\_  
Type or Print Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date

## Chapter 4

### Asking oral history questions

#### The interview schedule

The interview schedule helps you to establish a solid foundation with your interviewee. It is also important for a life history project. The interview schedule should contain the following;

- Family life and early life
- Personal background (name, employment, first job, residential address)
- Sports, hobbies, cultural activities
- School background (schooling, favourite subject/s, attendance)
- Movement to different places.<sup>5</sup>

#### Leading and open questions

It is important for you to develop key questions that will keep you focused and also lead to long answers. That is why learners are encouraged to formulate open-ended questions. Avoid leading questions as they lead to “yes” or “no” answers. The example is, “ Was farming difficult during the Great Depression in the 1930s? The answer would be “yes”, it was difficult or “no”, it was not difficult. **Leading questions** are not recommended for an oral history project as they give you limited information. However, if you structure a question like this, “What was it like farming during the Great Depression in the 1930s?”

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<sup>5</sup> Robben Island Museum, Reading the Transcript: Preserving and Analysing the Recorded Voice, 2<sup>nd</sup> Annual Oral History Colloquium, 5 April 2008, pp.70-78.

You are likely to get a long response that also includes the thoughts of the interviewee during that period. This is an **open** question.<sup>6</sup>

It is important to re-ask and re-phrase important questions in order to get maximum information.

### **Non-verbal communication**

Non-verbal communication can either make or break your interview. It is important to understand the cultural background of the interviewee. Eye contact is important in certain cultures as it shows trust and honesty. In other cultures, young people are not allowed to make eye contact with the interviewee. It is seen as a sign of disrespect. Teachers could guide learners on this aspect.

Nodding and smiling encourages the interviewer to participate as you are displaying interest as an interviewee.

The dress code is important. Learners are encouraged to wear school uniform or dress in an acceptable manner as this gives legitimacy to their project and shows respect for the interviewee.

It is therefore important to understand the local culture of the people. For example wait for the owner of the place to give you a chair to seat, you cannot seat anywhere in the house.

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<sup>6</sup> *Ibid.*

### **Handling general statements**

General statements are not helpful in an oral history project. What you need are historical facts for your project. Ask for specific examples if the person makes a general statement such as “South Africans hate all people from other parts of the world”

You could say, “Could you explain in more detail?”.

In certain areas, people use unique phrases when speaking. Ask the meaning of unfamiliar words and why those people in a given context used such words. This will assist you in the analysis and interpretation of your oral history sources.

### **Putting questions in a historical context**

Your questions as a researcher should always be linked to the historical context. For example, in the 2009 Nkosi Albert Luthuli Oral History Competition, some learners interviewed South Africans and foreign nationals under the topic of Xenophobia. Most of the questions only generated opinions (eg “the human rights of foreign nationals were violated”, it was against the Constitution to attack foreigners”).

These responses were legitimate and correct but were not placed in a historical context.

Apart from xenophobic violence, there should be questions that establish the reasons for migration to South Africa, the experiences of foreign nationals in South Africa, their journeys to the country and prejudices in their own countries. There are always push and pull factors in migration. Learners should understand the histories of the different countries of the world. This requires background research (reading of newspapers, magazines and books). Educators could organise bibliographies for learners after they have selected their topics.

For example, teachers could organise materials on the history and conflicts of the Great Lakes in order to understand the plight of the Congolese, Burundian and Rwandese citizens in South Africa. The same applies to the plight of Somali refugees/ economic migrants in South Africa.

School excursions could be conducted as part of background research for other oral history topics, too. These excursions could include visits to libraries, extension of invitations to local historians and visits to historical sites.

### **Probing questions**

Probing questions encourage the interviewee to expand on a particular point. For example, Can you tell me more about that? The aim here is to get more details, which are relevant for your project.

### **Double-barrelled questions**

These questions have two questions in one, for example, “ How did you speak with German prisoners of war and who taught you the language? This type of question is **not recommended** for oral history because it causes confusion. You are expected to ask one clear question.<sup>7</sup>

Remember, feelings and thoughts are part of the oral history project. They assist you in the analysis and interpretation of the past and present. Recording these feelings will be discussed in the next chapter on **transcribing**.

### **Challenges in an oral history interview**

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<sup>7</sup> *Ibid.*, p.82.

In most instances learners, as young people, are expected to interview older members of the community. Oral historians interviewed some of these members before. They could also have their own personal agendas (they want to tell stories, could exaggerate their roles in events, or promote particular causes).

As a result of their life experiences these interviewees have the capacity to take over the interview and dominate it. This is called **power relations** in an interview. The interviewer should be able to focus on his/her research questions.<sup>8</sup>

This can, however, be managed properly if the learner has conducted background research, has a set of key questions and an interview schedule to guide him/her.

Traumatic experiences also pose many challenges for the interviewer. People involved in traumatic experiences such as political violence may ignore chronology or historical facts and speak about their psychological understanding of the event. They could compress two events into one or develop their own narratives.

A person murdered in Johannesburg police cells in late 1975 could be linked to the June 1976 Soweto shootings. The story is factually incorrect but it tells us about the brutality of the police in apartheid South Africa during that period.

Oral history accounts of this nature are **subjective but still relevant** as they tell us about a people's understanding of a particular period and their attitudes towards certain decisions/ actions that affected them<sup>9</sup>.

It is the task of the oral history student, without embarrassing the interviewee, to put these experiences in a historical context.

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<sup>8</sup> Oral History, A Guide for Educators, (Wits History Workshop, 2004), pp.31-33.

<sup>9</sup> Allesandro Portelli, "Frontiers of Memory: The Massacre at the Fosse Ardeatine. History, Myth, Ritual and Symbol", paper delivered at the 2<sup>nd</sup> Annual Oral History Colloquium, Robben Island Museum, 2008.



In many instances, local people do not like to speak about painful past experiences. Teachers and school management structures need to introduce the oral history competition to parents and other members of the society.

Interviewers should not be emotionally involved in their research. They should remain professional at all times. This means that interviewers should not impose their own views on the interviewees. This could compromise the quality of the research and could lead to a breakdown of trust between the interviewer and the interviewee.

Post- research activities that could encourage community participation in school oral history research projects;

- School exhibitions
- Articles in school magazines
- Plays
- Documentaries and films

## **Chapter 5**

### **Transcribing the interviews**

Firstly, a duplicate copy of the tape must be dubbed. The master copy must never be edited. It should be treated as a document and be kept in a safe place.

When translating, the tape in the original language should also be preserved as a document. The translated version should be indicated as such.

A transcript is regarded as a precise and accurate written record of an interview. The best way is to tape the interview, then transcribe the interview from the tape.

The transcript should reflect what the interviewee has said and how they have phrased it even if the sentences are incomplete.

The transcript should show how the interviewee expressed his/her thoughts and how the interviewee spoke to the interviewer.

### **Format of transcripts**

- The heading must state who was interviewed, who interviewed them, where and when
- It should state who transcribed the tape and who corrected the transcription
- Style and spelling should be consistent
- The side of the tape used should be noted on the transcript
- The words of the interviewer and the interviewee should be indicated by using their initials, (eg RA, NS)
- Any notations added by transcribers should be in square brackets e.g. [inaudible]
- Names of newspapers and Books should be in *italics*.

### **Transcription Conventions**

- Poor sound should be indicated as [inaudible]. This means you could not hear the words on tape.
- Omissions. If there are gaps in the transcript because of interruption, use three dots ...
- Emotions and expressions. Note emotions in square brackets [laughs]
- Summaries: Summaries are used if a portion of the interview is not relevant to the topic. Transcribers should discuss the use of summaries with the interviewer.<sup>10</sup>

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<sup>10</sup> Reading the Transcript: Preserving and Analysing the Recorded Voice, pp.-84-85.

## **Chapter 6**

### **Presenting your research project before an adjudication panel**

Teachers and learners should note that the quality of presentations is influenced by the stages explained in the previous chapters of this guideline.

1. Adjudicators are interested in both the process of oral history research and the final product (research findings). The portfolio should not only contain your research findings but also the transcripts, the signed release form, primary documents (newspaper/magazine articles and the artifacts that were collected during the research process).
2. The panel requires copies and not originals
3. Sufficient time (30-45 minutes) could be given to each learner
4. The portfolio should be well organised (see Nkosi Albert Luthuli Oral History Competition guidelines sent to schools)
5. The analysis of the transcripts should show knowledge and understanding of the topic at hand.
6. The research should be placed in a historical context
7. There should be evidence of background research
8. The presenter should have a clear understanding of the verification process, bias and objectivity in research
9. Interviewees should speak for themselves. The interviewer must not replace the interviewee in the narrative. Make use of the extracts from the transcripts.
10. Learners should be prepared to answer questions from the adjudication panel only.
11. Lessons learnt from the research should be clearly stated

12. Present your research in any of the 11 official languages, preferably your first language (see Nkosi Albert Luthuli circular to schools)
13. Speak clearly and avoid the use of difficult words that can give an unintended/vague meaning to the panel
14. Make sure that your technical equipment works before you enter the adjudication hall

## **CONCLUSION**

Teachers and learners should note that no research is ever complete. Research findings could serve as pointers to further research and new questions could be asked as a result of your research findings.

Most of the topics are also relevant to the study of local and provincial histories in the curriculum. The oral history methodology could be applied in other subjects/ Learning Areas in the curriculum.

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