

Thomas Haigh – The Haigh Group, Turku, August 12 2009

The Historian for Hire

## CONDUCTING A CAREER ORAL HISTORY SERIES IN A TECHNICAL AREA

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## Aims of the Talk

- Introduce myself
- Suggested format for career oral histories
- General idea of time, cost, work involved
- Pragmatic hints on
  - Structuring and planning interview
  - Winning confidence of interviewee
  - Dealing with tricky situations
- Issues in commissioned oral history series

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## About Me

- Diverse disciplinary identities
  - B.Sc. & M.Eng in Computer Science (Manchester)
    - Worked on student newspaper
    - Interviews for Master's project
  - Ph.D. in History & Sociology of Science (Penn)
    - Worked approx 40% of time as IT consultant
  - School of Information Studies, U. of Wisconsin—Milwaukee
- Main research area is social/business/labor history of corporate IT work & institutions
  - Also history of data base systems, word processing, software industry, web search, web browsers, personal computer, science fiction, open source software and (non-historical) obsessive frequent fliers.
  - Chair of SHOT SIGCIS
  - Biographies editor of IEEE Annals of the History of Computing

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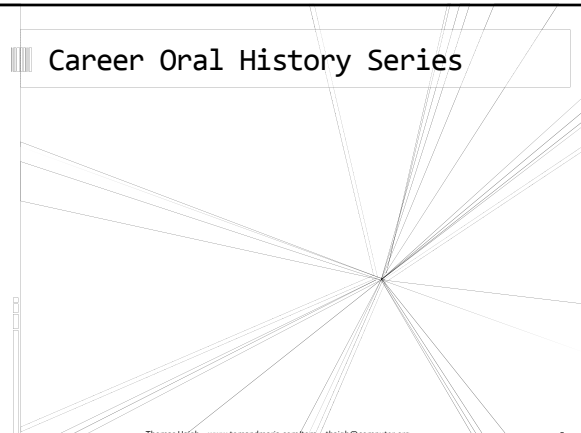
## Oral History Experience

- 23 full career oral history interviews for Society for Industrial and Applied Mathematics, 2004-2006
  - Supported by major DOE grant
  - Leading figures in numerical mathematical software
  - 4 to 24 hours each, median around 6 hours
- 9 for Software History Center/Computer History Museum
  - Software business people, mostly
  - Short (2 hours). Free.
  - Also moderation of round table historical discussions
- 3 interviews for the Association for Computing Machinery
  - 2 of them for ACM SIGMOD – data base researchers
  - Small fee from society funds

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## Career Oral History Series



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## The Career Oral History

- Open ended
  - Interviewee may choose to talk about family, etc.
- Covers whole career
  - Education
  - Business/academic career
  - Research
  - Professional Service
- Nature of project may stress one area more
  - Extra preparation, more follow ups
  - But allow subject to talk about what they think is important too

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## Budgeting Time

- Researching subject, sending approach letter, producing interview outline: 3 days
- Making travel arrangements: 0.5 days
- Travel and interview: 3.5 days
- Editing transcript after interview: 3 days
  
- Total: approx 10 days = 2 working weeks

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## Oral History Series

- A focused set of interviews is better
  - More valuable as source material
  - Preparation on topic is leveraged across multiple subjects
- Sponsors tend to have strong ideas
  - Ideally you would have a role in shaping direction
  - Personality and politics may influence choices
- Trends will emerge
  - Prosopography
  - Collective memory
  - Variant accounts of same projects/institutions/eras

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## Before the Interview

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## Preparation Activities

- Get a copy of resume
- Study previous interviews
  - Oral history and journalistic
  - Avoid duplication, get a feel for interviewee
- Read their writings, particularly
  - Survey articles
  - Memoir articles or unpublished fragments
- If possible, spend time with relevant archival collections
  - Very valuable, not always possible

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## Selecting Interviewees

- In commissioned series you may or may not have a say in who gets interviewed
- Start with major figures who have friendly reputation
  - They can suggest further subjects
- Breadth of coverage, such as
  - Time periods
  - Subfields
  - Institutions
- Leave the tricky ones to last
  - You'll be better prepared

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## Approach Letter

- I usually send on paper
  - More likely to get noticed
- Include
  - Who you are, your expertise
  - Who is sponsoring
  - What an oral history is
  - Interview format
    - Including ability to edit transcript before publication
    - Duration and proposed location
  - Planned repository for the transcript

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### 3 Night Interview Format

- Friday
  - Arrive late Friday afternoon. Get settled in, adjust to time difference.
  - Sleep
- Saturday
  - Session 1 around 10:30 am on Saturday
  - Lunch after about 90 minutes
  - Session 2 Saturday afternoon
  - Dinner with interviewee, and spouse if applicable
  - Review topic list, add possible new items
  - Sleep
- Sunday
  - Session 3 around 10am on Sunday (95% of time)
  - Lunch
  - Possible session 4 on Sunday afternoon (40% of time)
  - Dinner (possibly with interviewee)
  - Sleep
- Monday
  - Possible session 5 on Monday morning (rare, maybe 15% of time)
  - Depart Monday afternoon

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### Why Three Nights?

- You don't know how strong and alert subject will be
  - Allows four 90 minute sessions with ease
- Sometimes they talk a lot or have appointments to work around
  - Having the last morning has saved the need for expensive ticket changes or a second visit
- Arriving the day before is a buffer against missed flights
  - Greatly reduces risk of inconveniencing interviewee
- Being relaxed makes for a better interview
- One night might be more expensive
  - Legacy airlines charge a premium for short trips

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### What If It Has to Be Shorter?

- Less time =
  - Less detail and/or
  - Tighter focus
- I find two hours an absolute minimum
- Agree coverage areas before interview
- Less pleasant
  - You may need to be aggressive to keep them on topic

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### Interview Outline

- Don't write down the actual questions
- Do include a detailed checklist of topics
  - Ordered (include date range)
  - Hierarchical
  - Topics within broadly chronological order
- Cutting and pasting resume can be a base
- Include short quotes you want to introduce
  - With sources, page numbers
- Mine tend to be around 4-6 pages single spaced

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### Standard Areas to Cover

- Family background, early life, high school
- Undergraduate education
- Graduate education
  - Relationship with advisor, faculty, peers
- Positions held
- Research streams
  - Major publications in each
- Student advisees
- Professional and institutional service
  - Journals edited, society offices held, departmental or university contributions, etc.
- Their vita is your friend, get it early

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### Sample Outline

**Outline for Stewart Interview**

**Early Life and Education**  
 Family background (born DC, October 1, 1940) – father journalist (name – Gilbert Wright Stewart, III; why "Pete")  
 Moved around – Knoxville from 1953

**Early education**  
 Origins of interest in science and mathematics  
 Technological/scientific hobbies and activities  
 High school experiences  
 Algebra teacher – Mrs. Paul Adinger

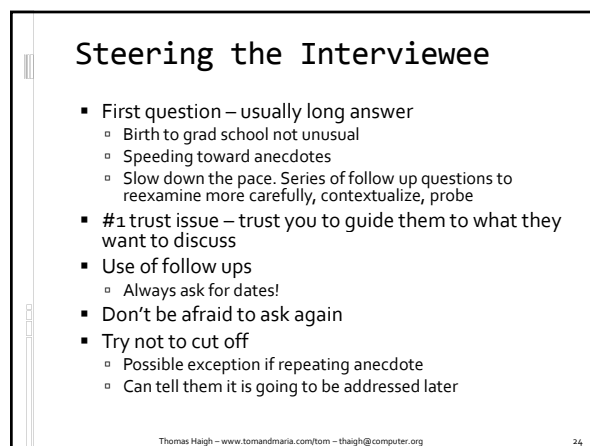
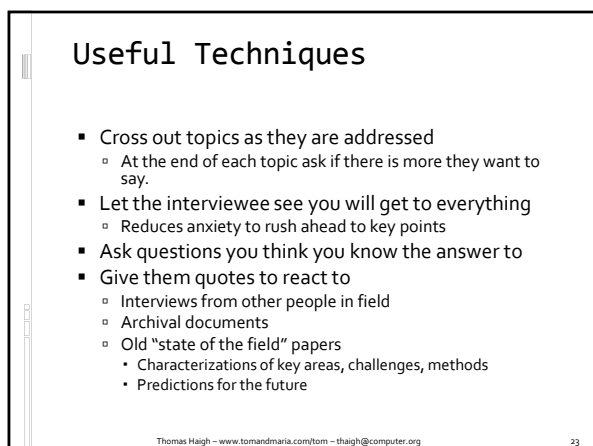
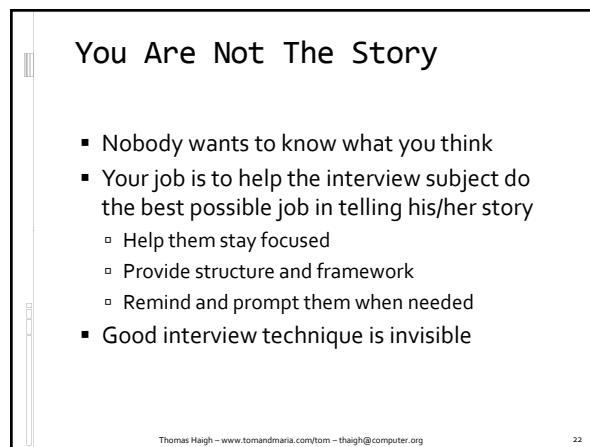
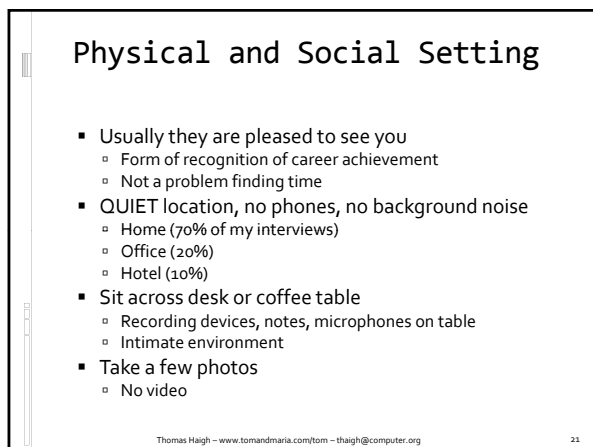
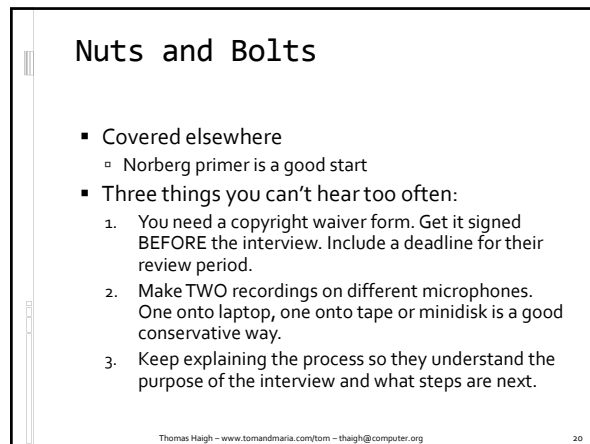
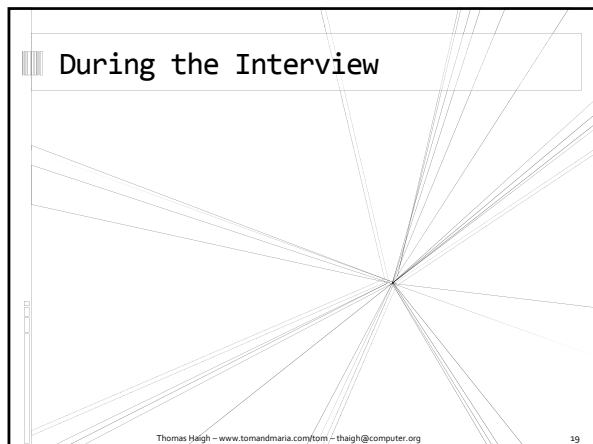
**A.B. University of Tennessee, 1962**  
 Why stay in Knoxville?  
 General discussion of education there  
 Fraternity members  
 Choice of mathematics as major  
 Place of numerical analysis in curriculum at this point  
 Faculty at the time  
 Thoughts about future/career at end of college  
 Senior year "Ponction as a Woodrow Wilson fellow to become an algebraic topologist. It didn't take..." – why?

**First involvement with computing**  
 Awareness of computers growing up  
 First experience of programming  
 During summer job Oak Ridge Gaseous Diffusion Plant)  
 Personal feelings toward  
 Place of computers in curriculum at U of TN at that point.

**Relationship with Oak Ridge**  
 General ties between Oak Ridge (plant and lab) and department  
 Personal involvement as trainee & programmer, summers, 1959-62  
 How came to be involved  
 General impressions of computing operation there  
 Work done  
 People worked with  
 Full time at Gaseous Diffusion Plant – 1963, 1965-66  
 Same issues as above  
 Attractions of working there  
 Interactions between thesis research and Oak Ridge work?

**Programmer, GE Computer Division, Phoenix, 1964-65**  
 Why? How does it fit with Oak Ridge and studies  
 State of GE computer division at the time  
 Place of scientific computing within it

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## Good Final Questions

- Considering your whole professional life (or to date) what is your biggest single regret. It might be something you did or didn't do, or how something turned out for reasons beyond your control.
- Looking back over your career as a whole (or to date if applicable) of what single professional accomplishment are you most proud.
- Very open ended, so the way they approach it tells as much or more as the specifics.
  - Regrets – none, few, many.
  - Accomplishment – students, papers, system, company, family (kind of cheating), “hasn't happened yet” (in denial)

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## Difficult Moments

- Interviewee says something untrue
  - If background fact then politely correct once, don't argue further
  - Quote from archival source/old paper and ask for clarification
- Interviewee rambles
  - Give them space, repeat question as needed. Don't get thrown off the topic. Mark possible follow ups for later.
- Interviewee is senile
  - You have a real problem. Figure out if careful guidance may produce usable material.
- Interviewee is unpleasant
  - Be professional. Let them present themselves, but don't set traps.
- Interviewee says “I don't want this written down” with tape running
  - Interrupt, tell them it will be unless we pause recording but that they can edit transcript before publication.

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## Difficult Moments II

- Interviewee rambles onto details of personal life
  - Not a problem in this format. Fact that they think important is justification to include. But, you do not have to ask follow ups, or can ask as a way to clarify relevance.
- Interviewee insults colleagues
  - Could actually be very valuable historically. But ask follow ups to try to get to the root of the issue, particularly personal dislike vs. social/intellectual factors.
  - Alert sponsor to possible libel/slander.
- Interviewee denigrates sponsor of interview
  - Can provide genuine historical insight.
  - Sponsor might not like it. Don't encourage, don't censor.
- Interviewee talks forever
  - If it's relevant, let them. People find their own rhythm. My longest interview is over 24 hours.
- Interviewee won't say much
  - Coax them. But leave silences to fill.
- Interviewee has own agenda
  - Use techniques mentioned to convince them that they will get to cover all topics in the end.
- Interviewee has a whole bunch of prefabricated stories (Mask-related)
  - Let them tell them (unless already in other transcripts or memoirs). But ask follow ups that knock them off the script.

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## Slipping in “non-Elite” Topics

- You care about social history, but the people with money want to glorify elites. What to do?
- Elite experience can also be representative
- For example, I ask people who first used computers in the 1950s as grad students
  - Organization of work (closed vs. open shop)
  - Who were the operators
  - Craft programming practices
  - Did they listen to the computer
  - Location and staffing of keypunch section

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## After the Interview

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## Transcription

- Don't do it yourself!
- Give transcriber a list of names and terms used
  - Subject's resume and your outline also help
- Ask for recommendations
  - Transcriber quality varies
- Should take a month or so to receive draft transcript

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## Interviewer Editing

- Several days work on a full service, full length interview
- Play through whole interview while reading transcript
  - Fix errors (even good transcribers make them)
  - Improve punctuation, eliminate "ums", etc.
  - Insert citations to book and papers mentioned
  - Google is your friend for names, places, people
  - Flag names or terms you can't figure out
  - Flag apparent factual errors
  - More leeway with your words than theirs.
- I have occasionally asked follow ups via email
  - Edit into transcript with footnote
- Add the abstract (important) and cover sheet
  - No need for an index
  - Section headings optional

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## Interviewee Editing

- Send to interviewee only after you've cleaned it up as much as you can
  - You are being paid, they aren't.
- Usually as Microsoft Word attachment
- I use yellow highlighter on things I know need attention
- Huge range of results
  - Total rewrite (may never finish) to minor corrections
  - A few weeks to many years
- Perfectionists are dangerous
  - Emphasize that spoken English is always different to written English

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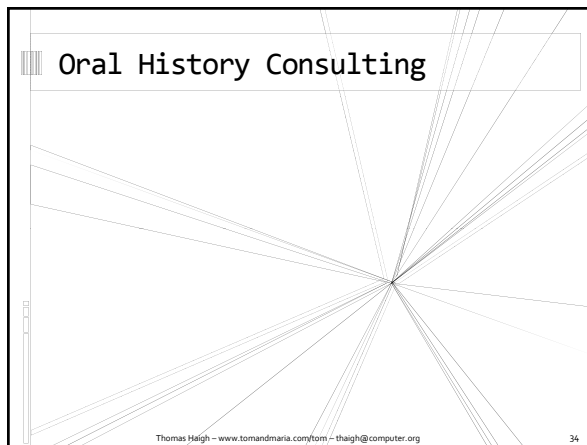
## Allow a LONG TIME for Review

- Most interviewees need reminder and take more than six months
  - Some take several years (30%)
  - Some will never do it (15%)
- Don't make it a milestone for budgeting or payment
  - It will mess things up for you!
- This is why you include a time limit in the waiver document
  - three months or six months is good
  - In reality give longer, but you have flexibility
  - Publication of unedited version may motivate subject to edit

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## Oral History Consulting



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## Being a Consultant

- Be "professional"
  - Be clear about methods, timeline, costs, what is and isn't included, etc.
    - You need a written proposal
    - A contract is overkill unless sponsor insists
  - Proofread all communications
  - Keep sponsor informed as to progress
  - Do good work
  - Meet agreed deadlines - this isn't a book review!
  - Dress nicely
- Be confident
  - Ask for more money than you would settle for
  - Believe that you deserve it and explain why
- Look after the money
  - Keep all receipts and document expenses
  - Invoice promptly

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## Technical Knowledge

- Good to have
  - Makes for better interviews
  - Allows clarification and follow up questions
- Can have knowledge of some relevant areas
  - In my case: software technology yes, numerical methods no.
  - Don't try and bluff it
- Some generic questions work, e.g.
  - What earlier work did you build on?
  - What was novel about this?
  - What other approaches were people trying at the same time?
  - What in your training and experience prepared you for this work?
  - What areas was this work applied in?
- Sometimes just smile, nod, and hope the readers will understand

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## Academic/Professional Societies

- Usually get interested in history when
  - Anniversary looms
  - They realize key figures are dying off
- Increasing sponsorship of oral history
  - Usually as part of broader initiative
  - Tend to overemphasize vs. archival work
- Sometimes see history as a means to an end
  - Public relations
  - Furthering battles with rival societies
  - Look for alignment between their needs and yours

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## Society Politics

- My experience: big difference
  - Grant money: Need to spend quickly & with academic credibility
  - Society money: Spend cautiously & grudgingly
- Society leaders may look for proprietary advantage
  - Skew toward famous subjects
- Tend to think that oral history interview can stand alone
  - Skews resource allocation

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## Accompanying Activities

- Gather accompanying papers
  - Small amounts for scanning as exhibits
  - Large amounts refer to appropriate archives
- Insert resume or memoir fragments as appendix in transcript
- Pitch accompanying articles or biographies
  - Part of grant or consulting proposal
  - Remember IEEE Annals Biographies Department

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## Your Time and Expertise Is Worth More Than You Think



- Rule of thumb (US)
  - \$X/yr salary = \$X/hour consulting fee
- Full career interview is approx 2 weeks @ 40 hrs/week = 80 hours
  - Say you are worth \$70,000/yr
  - One interview = 80 hours @ \$70/hour = \$5,600
- Charge less if
  - You have an intrinsic interest in the material
  - You are desperate for money
  - You're going to skimp on preparation/editing/scope
  - You owe someone a favor
- Groups with staff historians understand the job market
  - Generally pay badly...
  - Exception: Federal Govt.
- In Europe, who knows.

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## Don't Forget the Other Costs

As well as your fee sponsor must budget approx \$2,000 per interview for

- Transcription
  - I pay \$2 per hour of tape for US transcriber
    - i.e. 6 hour interview = 360 x 2 = \$720
    - Gets good, careful service. Still needs a lot of attention.
    - India is reported to be cheaper
- Travel costs, typically \$1,000 to \$1,500
  - Plane (or train travel) to interviewee
  - Car rental or taxi travel
  - Hotels and meals (three day format)
    - I base on US Government per diems
    - Reasonable, non-controversial, tax deductible

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## Using Oral History Transcripts

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## Different Ways to Use Transcripts

I have personally found useful as

1. Garnish
    - Quotes or color to enliven narrative
  2. Source of triangulation or diverging perspective
  3. Way to fill in gaps or context in written record
  4. Source of insight into personality
  5. Map of topics for follow up
    - Overview flagging projects, people, institutions for investigation via written sources and more interviews
- Also, edit reference into Wikipedia page on subject.

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## Sample Articles

- Products of two sponsored projects
  - Not my most conceptually ambitious work
- Biographies of two SIAM project oral history subjects
  - Cleve Moler, Jack Dongarra
- Biographies and short articles on industry association ADAPSO
  - Three articles, five biographies
  - Archival sources and oral histories integrated

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## Institutional/Project Histories

- Obvious kind of publication from oral history series
- Other kinds of source are needed
  - Best to look at archives before doing most of the oral histories
  - Can do hybrid of institutional biography and human biographies

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## Biographical Articles

- Oral history can be a good basis
- Often multiple histories from a coherent series are relevant to one individual
- Best if other sources are available
- Promising IEEE Annals biographies can be an effective dissemination deliverable for a grant or consulting contract

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## Unverified Factual Claims

- Transcripts are NOT sufficient authority for use of dates, numbers, causality, etc
- If cannot verify from other sources, disclaim with
  - X remembers
  - According to X
  - Today, X believes that
  - X says
  - X claims

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## Research Value

- "You can't do oral history interviews for somebody else's research." – Mahoney. True?
  - Will posterity care?
- Cherry with no sundae?



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## And don't forget...

- The Haigh Group for all your history services needs...
- The end.