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Connecting the Generations: A Practical Guide to Implementing an Oral History Project in the Gerontology Classroom

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Experiential learning is an important theme in education today. Including an intergenerational oral history project in undergraduate gerontology courses is a pedagogical approach that can have positive outcomes for students and elders alike. In this article, the authors draw from experience as they describe an oral history project which they have conducted for over a decade. Key findings from this project include that students' attitudes toward older adults and the aging process improve both when the project is included in a traditional classroom or in an on-line environment. There are equivalent positive shifts in students' attitudes when they interview elders who are family or close friends and when they interview elders with whom they are not acquainted. As a result of participating in oral history interviews, elders may experience increased perceived generativity, and their life satisfaction may improve over time. Key considerations for implementation of this project are discussed.

Key Words: Oral History, Intergenerational, Pedagogy, Gerontology

This practice article describes a successful intergenerational oral history project implemented in gerontology classes by the authors for more than a decade. Oral history can be broadly defined as a technique used to obtain personal recollections from individuals through in-depth interviews for the purpose of preserving historical information (Yow, 2005). Since 2005 over 2,000 undergraduate students, about 160 students annually, enrolled in our 200-level gerontology courses have completed the oral history project which involves conducting multiple interviews with elders using a semi-structured biographical interview guide. The overarching goal of this project is to bridge a) students' need to develop culturally competent attitudes toward older adults and the aging process with b) older adults' need to review and integrate life experiences. This pedagogical approach allows students to apply course

materials and is reciprocally beneficial both to students and interviewees.

Over time, we evaluated the impact of the oral history project on students and on elders. Based on Mezirow's Theory of Transformative Learning (1978), we hypothesized that students would develop more holistic views of elders, thus promoting positive shifts in attitudes toward older adults and the aging process. Our research supports this hypothesis. Students developed more positive attitudes toward older adults and aging when the project was included in a traditional face-to-face class (Ligon, Ehlman, Moriello, & Welleford, 2009) and in an on-line course (Ehlman, Ligon, Moriello, Welleford, & Shuster, 2011). Attitudes toward older adults and aging improved equally when students interviewed family or close friends and when they interviewed elders with whom they were not acquainted (Moriello, Ligon, & Ehlman, 2016). We also hypothesized that elders would benefit from interviews because they promote reminiscence and generativity which are needs of late-life (Butler, 1963; Erikson & Erikson, 1997). Results indicate that interviewees experience increases in perceived generativity (Ehlman, Ligon, & Moriello, 2014) and a trend toward improved life satisfaction in the time that elapses after the interviews (Authors, 2012). This article describes the project as implemented and includes important considerations for others who wish to implement a similar project.

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Oral History Project Description

The authors include the oral history project at two universities in 200-level classes titled *Social Aspects of Aging* and *Healthcare Aspects of Aging*. While each course has unique objectives, there are also commonalities. In both courses, we seek to elucidate the lifecourse perspective, provide opportunities to apply course materials to lived experiences of elders, dispel myths and stereotypes of older adults and aging, and positively influence students' attitudes toward older adults and the aging process. On average, from the initial orientation to completion of the final project, approximately 10 weeks elapse. In the following sections, we outline important elements of our project, including: a) interviewees, b) informed consent, c) orientation, d) conducting the interviews, and e) deliverables.

Interviewees

Inclusion criteria for this project are that interviewees are at least 65 years of age and free from known diagnoses of cognitive impairment or mental health problems. For older adults who are diagnosed with cognitive impairment or mental health problems, this project could be counter-productive for the interviewee as well as the student. We have conducted the project by recruiting interviewees from local community organizations and by having students recruit their own interviewees, usually family or close friends. Inclusion criteria are the same in both cases. We have compared outcomes of these two methods and, while both are equally effective in promoting positive attitudinal shifts among undergraduate students (Moriello, Ligon, & Ehlman, 2016), each method has benefits and challenges.

When students interview family members or close friends, existing relationships are often strengthened as students discover facets of loved-ones' lives with which they were unfamiliar. Furthermore, the work associated with identifying interviewees is left to each student. When students interview those with whom they are not acquainted, they are challenged to establish rapport with a new contact, a skill that is transferable and particularly beneficial for students in health and helping professions. This method allows for strengthening relations with community groups and can expose students to diverse groups of elders; however, it can be very time consuming to recruit interviewees and schedule spaces in which the interviews will take place.

Consent

It is important to receive Institutional Review Board approval and to gather informed consent from interviewees when research is conducted. Additionally, informed consent is collected even when research is not being conducted when interviewees' names are used in the project. In oral history, sharing one's experiences with others is the purpose of the project; therefore, there is no

expected agreement that information shared will be kept confidential or that narrators' names will be omitted or kept confidential (Boschma, Yonge, & Mychajlunow, 2003). When students interview elders who the instructor recruits through community partnerships, the instructor obtains consent from interviewees. When students interview elders through their own personal contacts, students obtain consent and turn the consent form in to the instructor (see Appendix A, titled "Informed Consent"). If interview recordings are to be archived or used in a public manner, then A Deed of Gift should be secured (Yow, 2005). This form should be signed by narrators after completion of the interviews so that they are fully aware of the information they are making publicly available (Yow, 2005).

Orientation

Within the first weeks of the semester, students complete a two-hour orientation which includes the history and description of oral history, benefits of the project, topics to be covered within the interviews, interviewing techniques, instructions for reflection papers and final products, and the ethical responsibilities of interviewees. When recruiting interviewees from community organizations, interviewees are invited to participate in one hour of the orientation. This enables students and elders to meet one another and learn more about the project together.

Instructors often begin the orientation with a short story or audio segment demonstrating how this project connects the generations. Examples of these orientation-starters include sharing an intergenerational StoryCorp (<https://storycorps.org/>) interview or reading Mem Fox's *Wildrid Gordon McDonald Partridge* (Fox, 1985) children's book aloud. Orientation-starters connect with students on an emotional level and begin to allow students to see how life-story sharing is mutually beneficial for the elder and interviewer through an example outside of themselves. Students practice interviewing one another during this orientation, and the interview guide is introduced at this time. Students are instructed to conduct interviews in a chronological manner utilizing the interview guide, with the first interview focusing on childhood and youth, the second on early adulthood, and the third on later adulthood. Instructors make it clear that the guide serves as a starting point but that students are free to ask their own questions and are encouraged to ask follow-up questions. Likewise, narrators are informed that they can speak as much or as little about topics the students bring up and can choose not to answer questions that make them uncomfortable. Use of semi-structured questions allows narrators to talk freely and speak about events not thought of by interviewers (Hunter, 1999). It also allows the interviewer to ask self-generated questions of personal interest. In this way the oral history interviews develop into a shared experience (Bornat, 1989; Lubarsky,

1997). See Appendix B for the content of the Interview Guide.

Occasionally, topics come up that elders find difficult to discuss, and students are instructed how to handle these situations during the orientation. From our experience, elders generally respond to difficult (or ‘off-limits’) topics by either 1) changing the subject or answering a different question than what was asked, 2) stating that they do not want to talk about the topic, or 3) warning the student that the topic is difficult but that they want to share about it. When the elder answers a different question, students are encouraged to rephrase the question to ensure that the elder did not mishear or misunderstand the question. If the elder again does not answer, students are directed to move on. They are encouraged to move on immediately if the elder states they do not want to discuss the topic. If the elders desires to talk about a difficult subject, students are advised to be supportive listeners but not to try to counsel or advise the elder. Expressions of sadness can be challenging for students to hear, but they are encouraged to allow the elder to express themselves. Students are given the opportunity to discuss their experiences both through reflection papers and class discussions which enables students to process the experience and receive support from the instructor as well as other students.

Conducting the Interviews

Face-to-face interviews are preferable but not always possible if students’ interviewees are family members who live a distance away. We strongly encourage students to complete at least one of the three interviews in person; therefore, it is helpful to schedule reflection due dates after a long weekend when possible so that students have a chance to interview family members in their home communities. We allow students to utilize applications such as Zoom, Skype or Facetime for the remaining interviews. Interviews should be conducted in a mutually agreeable setting that is quiet and comfortable. Students use voice recorders to capture the interviews; therefore, it is important to select a quiet environment and to minimize background noise. Voice recorders are used whether the interview occurs in-person or through use of an application. Recordings are necessary in order to complete required deliverables for the assignment. The interviews should be limited to one hour as it is difficult for interviewers and interviewees to maintain focus for longer periods of time. Interviews are scheduled one time per week over a three-week period. Frequently interviewees recall information during the time that elapses between interviews, and students are instructed to allow interviewees to add or update information from prior interviews at subsequent interviews. During the interviews, students are encouraged to ask interviewees if they have photographs or memorabilia that they would like to share. These artifacts may be included in the students’ deliverables with the interviewee’s permission. Students can use smartphones to take pictures of interviewees’

photographs or memorabilia so that a digital copy is available for inclusion in final projects.

Where interviews occur is an important consideration. When students interview family or close friends, interviews most often occur in the interviewee’s home. When interviews are conducted with community members, interviews occur either on a university campus or at a community site during class time. When possible, students are matched individually with elders, but if there are fewer interviewees than students, two students can be assigned to one older adult whom they interview at the same time. Conducting interviews in a large common area can work as long as adequate space between interviewer/interviewees pairs is provided; however, for interviewees with significant hearing loss, it is essential to provide a private room. A benefit of conducting interviews with community partners is that it allows for including interviewees both in the orientation and in a final wrap-up meeting.

Deliverables

Assessment of course objectives and resources, such as time and facilities, should be considered when designing deliverables. We consistently require reflection papers after each interview, though we have used different assignments for the final deliverables for this project with students either 1) writing biographies of their interviewees’ lives or 2) transcribing their interviews. These variations spring from differences in course objectives and resources. Finally, based on Transformative Learning Theory (Mezirow, 1978), it is important for students to articulate what they learn through the project, and we accomplish this objective by requiring presentations. In subsequent sections, we describe the reflection paper, and then we include several variations of the final presentation assignments.

Reflection Papers. Transformative Learning Theory suggests that experience is at the heart of learning but also that critical reflection is required for true learning to occur (Mezirow, 1978). Learning is a process of interpreting experience in order to construe new understanding which, in turn, guides future action (Mezirow, 1978). We provide students with a structure for critical reflection using the Lewinian Experiential Learning Model (Kolb, 1984). See Figure 1 for a synopsis of the Lewinian Experiential Learning Model.

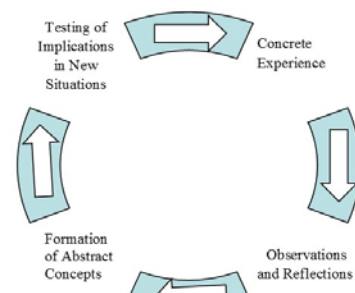


Figure 1. The Lewinian Model of Experiential Learning (Kolb, 1984, p. 21).

The Lewinian Experiential Learning Model (Kolb, 1984) begins with a concrete experience, which, in this project, is the interview itself. The reflection paper follows the second, third, and fourth phases of this model. In the second phase, Observations and Reflections, students discuss their reactions to and the actual occurrences of the interviews. In the third phase, Formation of Abstract Concepts and Generalizations, students connect their experiences more broadly with course materials. In the last phase, Testing Concepts in New Situations, students write about how to implement lessons learned in upcoming interviews and future interactions. Reflection paper grades are primarily based on students' abilities to connect course materials to their interview experience. Reflection grades are approximately 50% of the grade for the oral history project and 15% of the grade for the entire class. See Table 1 for the content of the reflection rubric.

Table 1.
Reflection Rubric

Criteria	Levels of Achievement		
	Novice (0-25%)	Competent (25 – 75%)	Proficient (75-100%)
Lewinian Reflection Weight: 25%	Does not follow Lewinian Reflection	Follows at least two of the Lewinian Reflection Criteria	Follows What, So What, Now What
Integration of Three Terms Weight: 50%	Integrates zero to one course terms	Integrates at least one course term and applies definition	Integrates at least three course terms and conveys understanding of term
Grammar Style Weight: 25%	Needs improvement in paragraph development; Needs improvement in sentence development; More than 6 edits to grammar/style	Moving toward solid paragraph development; Moving toward solid sentence structure; Less than six grammar/style recommendations	Solid paragraph development; Solid sentence structure; Less than three grammar/style recommendations

Biographies or Transcripts. We require students to create a final product that can be shared with interviewees. Students either write a biography about the person's life or complete a transcription of the interview. In both cases, the lifecourse perspective is likely to be elucidated as students connect earlier life experiences to later life experiences. There are unique benefits and challenges associated with both methods.

Biographies are an ideal assignment for encouraging students to use expository writing skills. We require that the biographies have a structure, and most often papers are organized by time periods in the interviewee's life, like the interview guide, but they can also be organized by themes such as family, work, etc. Students are encouraged to embed photographs and other artifacts into the biography. A hazard of this method is that the biography, as written from the student's perspective, may not always accurately portray the interviewees' perspectives. We make interviewees aware in advance that the biography may not be completely accurate, but it is written to the best of the

student's ability given the timeframe in which they were born and the information they have acquired. Biographies are graded on the basis of organization, accuracy, detail, and grammar. Interviewees do not review biographies in advance but electronic copies are made available to them so that they themselves can make revisions as needed.

Instead of the biography, students can be required to transcribe interviews. Completing a transcription can be considered a critical component to the craft of oral history (Yow, 2005); however, transcribing requires a significant investment of students' time and does not involve critical thinking. Nonetheless, transcriptions preserve the voices of narrators, and they are easily archived. Transcripts are graded based on completion, which can be preferable when class sizes are large. In either case, whether students complete a biography or a transcription, they write thank you notes to interviewees and share transcripts or biographies and copies of the recorded interviews with their narrators as an expression of gratitude.

Presentations. The final deliverable in this project is a presentation that provides students with the opportunity to articulate what they have learned from this project. When we first began assigning this project, students gave short 5-10 minutes presentations outlining what they learned. They were encouraged to be creative in these presentations, and many were. Most students used PowerPoint, but others performed songs (one written by the student, another was a favorite hymn of the interviewee), created videos, served food using recipes shared by loved ones, provided words of wisdom in the interviewee's native language (e.g., Samoan), or performed short skits.

Presentations have been updated and organized in a variety of ways over the years, depending on class size, format of the class (distance or traditional) as well as changes in available technology. Some semesters we incorporated students' thank you letters into the presentation assignment. Students write thank you letters that not only express gratitude but also articulate the most valuable lessons learned through participation in this project. A class period is devoted to allowing students to share (or present) their letters to one another in small groups. Within the small group, students are instructed to note commonalities and differences among letters. In that class period, a mini qualitative analysis is conducted as small groups join with other small groups, and, finally, the entire class notes commonalities in important lessons learned. More recently, students created 'Digital Legacies' of their interviewee's life by creating websites in Google Sites. Google Sites is a tool that allows one to easily create

simple webpages. For this assignment, students summarize the most important information about the elders, include advice for future generations shared by the interviewee, and describe how the lifecourse perspective is evidenced in the life of their interviewee. Each student briefly shares their Digital Legacy presentation with the class. When the oral history assignment is used in an on-line class, students participate in a discussion board as the culminating activity. In four to five sentences, students are asked to share one element from the oral history project that has changed the way the student looks at aging and/or older adults. Then, students are asked to participate in at least two discussion board threads from fellow students. The evaluation of the presentation depends on the nature of the assignment being used; sometimes evaluation is used as a completion grade and other times a rubric is used to connect to presentation assignment deliverables. In sum, grading for the oral history project is based on student performance of project deliverables.

Conclusion

Many lessons have been learned from this assignment. First, having their narrator as a touch-point throughout the course appears to help students personalize topics, so it is beneficial to invite students to think of their narrator as course topics are addressed. Second, students typically begin the oral history assignment feeling nervous, not knowing what to expect. Through the orientation, instructors are encouraged to provide opportunities for students to role play an interview with classmates prior to beginning the formal interview process. Including reflection papers after each interview also provides students with a place to share their experiences. In sum, the oral history project is an engaging, pragmatic project that enables students and elders to benefit from rich intergenerational exchanges. How the project is implemented at other locations will be influenced by the setting, course objectives, resources, and interests of educators and students. In fact, the authors have modified the project over time to fit with available resources and changes in technology and the classroom. For us, the oral

history project has been a significant and meaningful pursuit.

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Appendix A

Non-Research Related Informed Consent

Oral History Project Informed Consent Form

The oral history project is an assignment in a class (Insert name of course offered) at (Insert name of University/College). (Insert name of Instructor) teaches this class. She can be reached at (Insert phone and email information). For this assignment, students interview older adults in order to better understand older adults and the aging process and to preserve historical information. This project is extremely helpful to students. They seem to grasp course materials better by completing this project.

In order to participate in this project, you should be at least 65 years old, free of a diagnosis of cognitive impairment (such as dementia), and emotionally stable. You will be recalling experiences from earlier in your life. We all experience normal age-related changes in memory, so that is nothing to be concerned about. However, if you have a diagnosis of dementia or if you have mental health issues or traumatic experiences that you have not dealt with, this project would not be well suited for you.

In order to complete this project, the student conducts three one-hour interviews with you. The student will ask questions about your childhood, young adulthood and later life. They will ask questions such as: “Where did you go to school? What was your family like? Where did you work inside or outside of the home? How is your experience of getting older? You may share as little or as much information as you like. Information gathered in oral history interviews **is not** confidential. In fact, after the interviews, each student will use the information you shared to write a biography of your life. You will receive a copy of this paper, and you may want to share it with family members.

If you decide to take part in this project, you may change your mind about participating at any time without penalty. If you meet the criteria for this project and would like to participate, please sign and date below.

Interviewee’s Signature: _____

Interviewee’s Printed Name: _____

Date: _____

Student’s Signature: _____

Student’s Printed Name: _____

Appendix B

Interview Guide

Interview 1: Childhood and Youth

Today we will be discussing your childhood and youth. If you're ready, we'll get started.

- Could you please begin by state your full name? (Include your first, middle, possibly maiden and last name). Please spell them out for me.
- Could you please tell me your birthdate?
- Where were you born? (Please list the town or city, state and country as well as the type of place you were born, i.e. at home or in a hospital).
- Could you please give me the full names of your mother and your father? (Include first, middle, possibly maiden and last names). (Spell them out too).
- Tell me about your parents. (Follow-ups: Where were they from? Do you know how they met? What type of work did your father do? Did your mother work outside of the home?)
- Did you have brothers and/or sisters? What were their names? Describe the birth order in your family.
- Describe your family. What was it like growing up in your house? Did other family members live with you or close by you? Were your parents together? What kind of parent was your mother? What kind of a parent was your father?
- Describe the place/s where you grew up. Tell me about your home/s where you lived in. Did you live in an urban or rural area? Please describe the area? Did your family move around? If so, could you tell me about the different places that you lived?
- Did you have chores when you were a child? Tell me about them. What did you do for fun when you were a child?
- What were the names of the schools you attended? What kind of a student were you? Did you have favorite subjects? What sports were available at your school? Did you play any sports?
- What did you do for fun when you were a teenager?
- How were holidays celebrated in your family? Was religion important to you as a young person?
- How are things different for children now than they were when you were a child? Describe some modern conveniences kids have today that you would have liked to have had.
- If you think about some of the major historical events that occurred when you were young (such as WWII, The Depression, possibly the Korean conflict, the Civil Rights Movement) how did these events impact you and/or your family?
- What were the joys and challenges of this phase of life?

Interview2: Early Adulthood

Today we will be discussing your adult life, primarily from the time you were 20 to 45.

- To start, what did you do initially as a young adult? (Work, go to college, join the military, get married, start housekeeping?) Tell me about that time of your life. What were you like? What was the world like?
- Did you get married or start a relationship with a significant life partner? What was that like? Did this relationship last? If you divorced, were widowed or remarried during your middle adult years, add that too.
- Did you have children? If so, about how old were you when each child was born? What did you like about becoming a parent? What were some of the challenges?
- Was family important to you during your young adult years? If so, tell me more about your family.
- Did you change jobs? Tell me more about your work. How important was it to you to work or be productive at this time in your life?

Interview Guide (Continued)

- Where did you live during young adulthood? Did you move often? Do you have special memories of a home you lived in during this time?
- Were there major or special events that occurred in your young adulthood? (Wedding day? Birth of a child? Perhaps a special vacation; an award you received; a significant accomplishment of a child, etc.)
- Can you tell me about the role of work in your life during these years? How did you feel about your work? If you were a homemaker, how did you like this job? If you work outside of the home, how did you feel about your job? Did you enjoy it? Did you work long hours?
- What did you or perhaps you and your family do for fun during your young adulthood? (Were there games that you enjoyed playing (cards, etc.?) Did you play sports or pursue hobbies? If so what were they?
- Were you involved in clubs or civic groups?)
- Tell me about your social life. Who were your friends or some of the most important people in your life? Who did you enjoy spending time with? Are there special occasions or vacations that stand out in your mind?
- How did you/your family celebrate holidays? Was religion or spirituality important to you as an adult? If so, can you tell me more about this? For example, did you participate in religious services? Did you take part in religious holidays or have special things that you did with your family or faith community?
- What historical events occurred during your adulthood which impacted you? (Examples? Korean Conflict, Death of JFK; Civil Rights Movement, Vietnam)
- Do you feel that you made contributions to the community during these years? If so, can you tell me about it?
- What were the joys and challenges of this phase of life?

Interview 3: Later Adulthood

Today we will be discussing your later years from about the age of 45 to the present, and we will talk about your life as a whole today too.

- What are the joys and challenges of this phase of life?
- How did your career/work change over time?
- Have you and/or your significant other retired from a job? If so, what was the retirement experience like for you? (and perhaps for your spouse)
- How important is it to you to work or be productive at this time in your life?
- Think about different roles that you've held (possibly parent, spouse, worker, retiree, and grandparent). Describe how your roles have changed over the years. What appeals to you about new roles you have (or will have)? What are the rewards and challenges of roles you hold or have held?
- What are the best things about getting older? What are some of the challenges?
- Can you describe your values; in other words, what is important to you? Have your values changed over the years? Or would you say that your values have remained stable over the years?
- Have recent historical events impacted your life? (Example 9-11, recent political events). If so, what were they? How did they affect you?
- Looking back over your life, what have been your biggest accomplishments?
- What is a piece of advice you would like to give to the next generation?
- To conclude, can you please describe what the experience of providing the oral history has been like for you?