Considerations for Remote Oral History Interviewing

No matter the path you chose, follow the OHA Principles and Best Practices Guidelines

START HERE!

Is it possible to conduct an in-person interview, or is a remote interview the best choice?

In-person → Great! If a delay in scheduling is necessary, use this time to conduct the pre-interview, go over project goals, releases, etc.. Otherwise start your interviewing process based on the OHA P/BP guidelines!

Remote Interview

STEP 1: Take inventory of technological access and preferences of both the narrator and interviewer

Don't forget about the file format! See more in Additional Considerations below

STEP 2: Consider scheduling a pre-interview to test connection and recording setup. Make a backup plan in case of technology failure on day of interview. Walk through informed consent and release form process.

STEP 3: Conduct the interview

STEP 4: Save recording. Make sure all permissions are accounted for.

How do you want to connect?

Do the participants have access to high speed internet?

- **Yes** → Do all participants have access to a computer/tablet with a webcam and microphone?
  - **Yes** → Do any participants have a preference for recording audio or video?
    - **Video interview** → Consider Option 3
    - **Audio record/ video connect** → Consider Option 3
    - **Audio only** → Consider Option 2 or 3
  - **No** → Do the participants have access to a phone?
- **No** → Do the participants have access to a phone?
- **Yes, but....** → Is the narrator comfortable with using internet based technology?
  - **No** → Do the participants have access to a phone?

Do the participants have access to a phone?
- **No** → No remote recording options; consider in-person interview
- **Yes** → Cell Phone → Consider Option 2

If web connected, consider....

- **Yes** → Landline → Consider Option 1

Special Considerations

Did you ask? . . .

Like →

Does the interview contain sensitive information or require an elevated level of security ? → Once communication and recording options are determined, see case study 1

Or

Have you been proactive in making the interview space accessible? → Be sure to check for any limitations in your tools, and barriers these may create for you or your narrator

Or

Are there restrictions to where the recording/digital file can be captured/housed? → **Like what?** → Are you under an IRB protocol that defines file handling/storage? / Does your interview require an elevated level of security?

Have you looked through "Special Considerations?"

How do you want to record? *

Option 1: Landline Phone

No extra cost:
- FreeConfernceCall.com
- Speaker phone with recorder

Extra cost:
- JK Audio Broadcast Host
- JK Audio QuickTap (CASESTUDY!)

Considerations:
Think about microphone differential and how the recording will sound different between connections

Option 2: Cell Phone

No extra cost:
- Rev.com (CASESTUDY!)
- FreeConferenceCall.com
- Google Voice
- Automatic Call Recorder Pro

Extra cost:
- TapeACall Pro
- JK Audio CellTap4

Considerations:
If recording via web connection vs. phone connection, see Option 3

Option 3: Web Based

No extra cost:
Video - Zoom (40 min max)
Audio - Cleanfeed, Zencastr

Extra cost:
Video
- Zoom (CASESTUDY!)
- Skype
- TheirStory
- Webex

Audio
- Squadcast
- Zencastr (CASESTUDY!)
- Cleanfeed

Considerations:
Quality depends on internet connection and access to equipment like webcams, external lighting, and microphones

Additional Considerations:

- Archival Considerations
- Compressed vs. Uncompressed
- Cloud vs. Local File Capture
- Backup Recording?

DON'T FORGET!
Deed of gift/consent form
- Virtual vs. Physical Signature

** Suggested recording platforms and hardware mentioned in this document were drawn from the personal experiences of oral historians. It is by no means exhaustive, nor should any suggestion contained therein be considered an official endorsement by the Oral History Association.

Introduction

The following resources are a product of the COVID-19 pandemic and the requirement to cease face-to-face interviewing for the health of both narrator and interviewer. By March 2020, many of us found ourselves sheltering in place, trying to learn how to do our jobs from home. For those working in oral history, remote interviewing became a pathway to continue essential oral history work. This guide is meant to be a resource to practitioners as they work through the numerous questions that arise with this method.

Though the current environment requires us to set aside face-to-face interviewing, these resources are intended to inform our practice beyond the international crisis created by COVID-19. There are many reasons for in-person interviewing to be our default, but those who developed this guide feel that remote interviewing should have a place in our practice even when it is safe to resume meeting face to face.

The Oral History Association's Remote Interviewing Resources Task Force developed the decision tree, accompanying narrative, and platform documents. Members included Jen Cramer, Natalie Fousekis, Andy Kolovos, Rachel Mears, Sarah Milligan, Steven Sielaff, and Amy Starecheski, with chair Allison Tracy-Taylor. We relied on colleagues and in some instances our own programs to supply case studies, and we thank everyone who contributed for their time and expertise.

How to Use this Guide

The decision tree was developed for ease of use in selecting an appropriate interviewing platform, and the accompanying narrative is meant to complement and when needed more fully explore questions or issues addressed in the decision tree. Much of the narrative is taken from pop-outs integrated into the tree to help provide users more context on different topics.

Generally, users should work through the questions on the tree in order to determine the best platform to use. The narrator of course is central to this selection process. Practitioners are encouraged to begin a conversation with the narrator about potential remote platforms early, check-in frequently, work with the narrator to ensure the platform is working (in a technical sense but also in terms of comfort and ease of use), and consider shifting platforms if issues arise.

We have also collected case studies of projects relying on remote interviewing. We know many have questions beyond what platform to use, and might be interested in both general and specific decisions made by colleagues on how to utilize a particular platform. We hope these case studies give users access to this kind of information. Neither the decision tree nor the case studies are intended to cover all available platforms; we have tried to include information on platforms that are currently seeing the most use in the profession. We will add more case studies and information on additional platforms over time. Further, as technology around remote interviewing develops and evolves, we will do our best to keep this guide up to date.

A Note on Essential Interviewing and COVID-19 Projects

When considering whether an interview is essential, the practitioner must ask themselves why do an interview at this time, and how can this interview be conducted meaningfully and ethically. Health, distance, project deadlines, and interview topics are just a few of the many reasons someone may decide conducting an interview remotely is the best option. However, it is important to be mindful of the fraught, precarious position narrators may be, or that we might find ourselves in. The possibility that postponing interview efforts is the best course of action (even if those eventual interviews will be done remotely) should be explored for any project. Section 2.3 in the [Oral History Society's Advice on remote oral history interviewing during the COVID-19 pandemic](#) offers a discussion on the considerations around the emotional and psychological state of both interviewer and narrator.

Further, many organizations have embarked on COVID-19 related projects, and these projects will assuredly capture important information about the pandemic and resulting international crisis that will be useful for researchers in current and future times. It is important to be clear, when either deciding to pursue similar projects or continuing current projects, about the overall goals for the project and how to conduct such a project with respect to potential narrators, project staff, and institutional resources.

Considerations for Remote Interviewing

Please note, the following sections are designed to be used with the decision tree to provide additional information and context for various topics and issues mentioned in the tree. They are provided here for users who may not have internet access while using the decision tree or would prefer to see this in a longer narrative format.

1. **Considerations for Choosing an In-Person vs. Remote Interview**

There are many benefits and advantages to conducting an in-person interview, but there are times when meeting in person is not feasible or advisable. There are also times when a remote interview is the better method for the narrator, interviewer, or both. The following list of questions is meant to help you decide which is the best option, but the answers to each question may not clearly point in either direction. It is important to engage in a tactful discussion with the narrator about these questions and to use your best judgement. These questions can and should be revisited in any interviewing situation.

- What are the narrator's preferences? Do they feel it is important to conduct the interview in the present time, or would they prefer to wait?
- What is the ultimate goal of the recorded interview? Is it solely for historical documentation, or a web-based production (e.g. podcast, vlog)? Is it for a broadcast documentary?

- What is the minimum quality level of the interview audio and/or video needed for your goal?
- What are the project deadlines? Can interviews wait, or is it important to gather interviews at the present time?
- If travel/meeting restrictions are in place and an in-person interview is possible at a later date, can the interview be postponed?
- Is the narrator located too far away to conduct an in-person interview in the near future?
- Is it possible you may have issues making a connection with and/or locating the narrator at a later date?
- What is the health and/or mobility of the narrator? Of the interviewer? Do health, disabilities, or other concerns make an in-person interview challenging?

2. Hardware Considerations

When determining whether a remote interview is possible on a computer, tablet, or other mobile device, it is critical to consider not just the operating system and access to internet connectivity, but also the hardware available to both narrator and interviewer.

With computers, laptops, tablets, or other mobile devices, built-in hardware, like microphones and also webcams, is likely relatively poor quality with recording the call in mind. If both interviewee and narrator can use external microphones and headphones, this is the best, and most simple, option for creating a quality audio recording and is highly recommended.

Special consideration may include an in-person assistant to the narrator where troubleshooting and setup for making the connection is needed. If this is a necessity and not available, choose the path that is the simplest to succeed for both connecting and recording over prioritizing quality considerations.

Audio-Recorded Interviews
All recorded parties should ideally plan to have some sort of external microphone and headphones. The complexity of hardware setup for remote interviewing can range from very simple options, like earbuds with built in microphones, to complex options, like a high-quality USB or audio-interface microphone (similar to what you would use for in-person interviews) and external headphones. Something also to consider is many externally-connected webcams also have decent built-in microphones.

Video-Recorded Interviews
While internal webcams for laptops and tablets are often of a good enough quality to connect to narrators remotely, if the interview is being recorded in video format, you might consider making external webcam options available to both the interviewer and narrator.

An additional consideration for video interviews is lighting. A simple option might be proper placement of laptop or mobile device relative to lighting sources (natural lighting is often better). A more complex option for external lighting hardware might be accomplished by using a ring light or other form of external lighting setup.

3. Audio vs. Video Recording

There are many variables to consider when deciding whether to record a remote interview in an audio or video format. Access and comfort with technology are primary drivers, but equally important are the narrator's preference, any specific project goals related to recording preference, and any partnering archive's preservation considerations.

Why Record Video in Remote Interviews

One of the primary challenges with remote interviewing is the loss of rapport between narrator and interviewer that comes from interacting in a shared physical space.

Pros: A benefit of recording the video connection for the remote interviewing is added context to the interview process, including non-verbal communication and insights into overall interview engagement. Most remote interview recording options do not have the ability to generate high quality video recordings, which generally means there are limitations to the application for engagement with these video files outside of general reference, but also tends to mean the files are relatively small in digital file size (which won't break the digital storage bank).

Cons: To record a video interview, outside of the considerations for a narrator or interviewers access to strong broad-band internet connections and hardware allowing for video connections, there may be additional issues as to why an individual does not want to be visually linked with an oral history interview. For instance, there may be a reluctance to have their (narrator or interviewer) personal environment captured in a space destined for public access. There are also considerations on the low quality of a video file generated through remote interviewing platforms and whether a partnering archive has a preference on the storage and long term maintenance of these types of formats.

Why Record Audio In Remote Interviews

Pros: There are multiple platforms that allow for an audio-only recording of an oral history interview, whether connecting via landline, mobile phone, or computer/internet enabled device. A key consideration in deciding to record an audio interview would be ease-of-use for connecting with the narrator. With so many connection and recording options, this can be the least stressful option for narrators without regular use of a video conferencing system or setup. There are options for high-quality recording for audio files, which archival partners often prefer for long-term preservation, and with higher clarity and recording quality, these can also have greater application down the road for public engagement.

Cons: Without a visual connection the interviewer and narrator have to rely solely on verbal cues for engagement. If a visual connection exists and only an audio file is recorded, subtleties in the visual communication may be lost to later audiences, similar to an in-person audio recorded interview.

Considerations

Though successful interviews can be conducted without having a visual connection, when selecting a remote interviewing set-up, consider preferencing platforms where possible that allow for face-to-face connection to the narrator and interviewer, whether the video file is part of the recorded capture (or archival file) or not.

4. Archival Considerations

Introduction

[Oral history archiving best practices](#) stress the importance of creating standard, high resolution, uncompressed media files for long-term preservation. Digital audio recordings maintained by archives should be stored as either WAV or Broadcast WAV. For video, while there is less absolute certainty on a single file format, the goals run toward files that are either uncompressed, utilize lossless compression, and/or are saved in widely accepted and widely adopted file formats.

Following these best practices, archives will normally reformat digital files they receive by converting them to standard, uncompressed formats. As noted, digital video poses special challenges for archives since high quality, uncompressed digital video files are extremely large, even by contemporary storage standards. Different archives will manage digital video files in their own ways depending on their ability to generate, access, store and sustain uncompressed files over time.

Context

Most of the widely-available remote interviewing platforms such as Zoom generate media files in [compressed formats](#). While there are options for creating high-quality audio files using remote systems—specifically some of the audio-only podcasting systems reviewed in [Web Based Recording](#)—there will still be a level of compression that happens through the mechanism used to connect the narrator and the interviewer. Furthermore, in addition to utilizing file compression, remotely recorded audio and video files are often created at a base-line lower resolution than those generated in person using professional equipment.

What Should I Do?

So what can we do when best practices stress one thing and circumstances force upon us something counter to them? First, cut yourself a break—these are not normal times, and as Voltaire wrote, "the best is the enemy of the good." If you are unable to put off your project until the pandemic has safely receded, use the tools available to you now. While they may not be perfect, they are certainly better than nothing.

If you have partnered with, or are connected to, an archival repository, reach out to them for guidance regarding how they would like to receive the files you created, and what additional

supporting documentation they will need from you. Ideally they can guide you through the process of reformatting or will assume responsibility for doing so.

What if You are Not Working with an Archive?
This is where individual familiarity and comfort levels with the specifics of digital audio and video become more important. Below we will address a few small things you should consider in order to manage your files on your own.

File Names
A digital file name needs to be unique and, in the context of oral history work, convey at least some minimal information to the user about the content of the file. Developing a basic file naming structure is helpful for managing digital media materials. A simple approach to file naming could incorporate things like the name of the narrator, date of the interview and kind of file–for example, *smith-jane_2020-07-05_video.mp4*. For additional file naming advice see the helpful [5 Tips For What NOT To Do When Creating A File Naming Structure](#).

Basic Metadata
In the context of oral history materials, *metadata* is a somewhat esoteric way of describing the information you collect and store about your interviews–the who, what were and when, as well other things such as subject keywords, permissions and various other details. Keep track of these things using the tools you favor most–a spreadsheet, a word processing file, a notebook. All this information will be valuable to an archive down the road. Preserving these metadata alongside the files is the best way to ensure continued intellectual access to their content.

Audio
Most commonly-used remote recording platforms create audio recordings in the compressed MP3 file format. In general, archives will convert MP3 files to WAV or Broadcast WAV as a part of their digital preservation strategy. Converting MP3 to WAV is relatively simple for anyone with access to and familiarity with audio editing software. To do so, open the original MP3 with your audio editing software and use the "Save As" command (or its equivalent) to convert to WAV. Be sure to retain the original file in addition to the WAV file you created.

From this point on, digital audio preservation gets technical pretty quickly, and if that is not something you're interested in, you might think about finding a partner who is. However, if you would like to learn a little bit more about some digital audio fundamentals, a recent audio field recording workshop hosted by the American Folklore Society and the Oral History Association does address some key concepts. Although focused on recording and recording technology, John Fenn of the American Folklife Center at the Library of Congress and Andy Kolovos of the Vermont Folklife Center talk in some detail about things such as sampling rate and bit depth. The video is available for free to OHA members here: https://oha.memberclicks.net/oha-webinar.

Video

As noted elsewhere, while archives have largely settled on an approach to preserving digital audio, digital video preservation is a much more complicated affair. The considerations for determining assessing and prioritizing file structures for video are generally whether it is: 1) uncompressed 2) lossless and 3) ubiquitous. It is most often not possible to attain all three in a single file format, but suggestions might be MPEG-2, MOV, or MPEG-4. For someone working on their own without archive support, the simplest advice is to name your files consistently and leave them in their original formats. If you plan on editing or transcribing your recordings, create a duplicate set of work files for access. Keep your originals set aside as your preservation files. For more on video file preservation, see the FADGI audio-video working group suggestions: http://www.digitizationguidelines.gov/guidelines/video_reformatting_compare.html.

Backup Files
Redundancy–keeping multiple copies of your files on different storage media–is crucial to preserving your digital files. If you have access to server space through work or school and can store materials there, by all means do so. Purchase one or more external disk drives, save your files to them and store the drives in two different physical locations. If the material in the interviews is not sensitive, look into cloud storage through services such as DropBox or Google Drive. Always keep in mind the concept of LOCKSS: Lots Of Copies Keeps Stuff Safe.

Summary

If you are working with an archival partner, reach out to them for support and advice regarding how to manage your digital audio and video files. If you are not working with an archival partner, there are a few simple steps you can take to maintain intellectual access to your recordings and help preserve the files over time.

When looking at the video files generated through platforms like Zoom, it is less of a question of storage size (a Zoom one-hour recorded video and audio file is roughly 170MB) and more a question of whether an archive has the ability to manage digital video files within their current infrastructure and wants to take on preservation and access for a video recording that has limited use for public engagement outside of general reference.

A potential option for archives struggling to capture the highest quality and most stable recording for remote interviewing which allows narrator and interviewer to connect visually might be to pair a video platform for connection and a separate audio platform for recording (see more about this on web based recording).

Major Takeaways

- Oral History Association Principles and Best Practices for archives document: https://www.oralhistory.org/archives-principles-and-best-practices-overview/
- Simplified goals for media preservation files (library of congress file format recommendations: https://www.loc.gov/preservation/resources/rfs/TOC-rev.html)

- *Ideal File Formats*
  Audio: Broadcast WAV
  Video: MPEG-2, MOV
- *Acceptable formats:*
  Audio: WAV, AIFF, FLAC
  Video: MPEG-4
- Is the recorded file going to be managed long term by the oral historian or placed in a repository?
  - If relevant, check with the repository you are housing collections to confirm specifications (generally there is a minimum level).
- Regardless of how the file was generated, the goal is still to save preservation files to a lossless format for archiving. For audio, convert any compressed files like MP3 to WAV or Broadcast WAV.
- Most common video formats employ some kind of file compression as a way to control file size
- As a place to start, the [Personal Digital Archiving](#) resources created by the Library of Congress are helpful for a quick introduction to some of the basics of managing digital materials on your own. Although very useful, it does not go into the particulars of file formats and settings.

5. Compressed vs. Uncompressed

Introduction
The question of which file type to choose for recording remote interviews is something that should be decided during the planning phase of any interview series. If the interviewer is working with an archive, this is the time to consult these partnerships on any preferences. Whatever you choose, be deliberate and informed about options and process.

What Do We Mean By "Compression?"
One hour of uncompressed stereo audio at "CD Quality" requires approximately 635MB of storage. The same content saved as a high quality MP3 file–a compressed format–requires roughly 87MB. As this comparison indicates, digital file compression saves storage space. However, the savings often comes with a compromise: reduced audio fidelity. Best practices for oral history interview recording stress the importance of recording in uncompressed, standard file formats (for example WAV or Broadcast WAV when recording audio) whenever possible.
Lossy vs. Lossless Compression

The primary purposes of digital file compression are to decrease file size to facilitate remote transmission and to reduce digital storage demands. Digital file compression includes two categories: "lossy" and "lossless" compression. Lossy compression reduces file size by, essentially, throwing away data–once these data are removed, they cannot be restored. The MP3 format employs lossy compression. Lossless compression reduces file size without throwing away data. The compressed media formats created through most remote interviewing systems employ lossy compression.

Compounding Compression
Opening a compressed media file in an editing system and resaving it in a compressed format will cause the already-compressed file to be compressed once again, with a resulting decrease in file size and associated decrease in fidelity/resolution. This is referred to as "compounding compression." If you are unable to convert your compressed files to an uncompressed equivalent file format, maintain a copy of the original file as your "preservation" file and use a separate version of it for any editing work or other file manipulation.

The Context

When conducting in-person interviews using audio or video, oral historians have a wide-range of equipment options for tailoring recording quality to archival standards. In the context of remote interviewing, interviewers are constrained by the limitations of the remote recording systems they use and the telecommunications infrastructure over which these systems run. Most of the options for remote interview recording (for example Zoom) generate audio and video files that utilize compression to reduce the amount of data being transmitted, and export these files in compressed formats such as MP3 audio and MP4 video.

When conducting interviews remotely, options for high-quality or uncompressed recording processes are limited–and often depend on a wide range of variables such as bandwidth. For archives working with interviews that have been recorded remotely, it is best to be as flexible as possible.

Summary

Following oral history best practices, audio recordings should be created in a standard, uncompressed file format such as WAV or Broadcast WAV. For video, while there is less absolute certainty on a single file format to strive towards, the goals run towards 1) uncompressed 2) lossless and 3) ubiquitous.

These best practices are difficult to achieve when recording remotely, since most remote recording systems generate media files in compressed formats. **Do the best you can with what you have available to you, and reach out to your chosen archival repository for guidance on how to reformat interview recording files for deposit.** For more details on archives, see [Archival Considerations](#).

6. Cloud vs Local File Capture
There are two primary options for capturing a recording file during a remote interview: cloud capture and local file capture.

Cloud File Capture
Pros: A more seamless recording experience for platforms that have cloud storage integrated, as well as built-in options to some platforms for speech-to-text transcription services.

Cons: Security concerns over the files being recorded to/kept on a cloud storage platform. Instances where this might be a factor are if there are concerns on security of access to the file.

If the interview is discussing sensitive topics or the narrator is high profile there may be an elevated concern. File creation in a cloud environment that isn't secured by the interviewer is another concern. Projects working under an Institutional Review Board protocol might be required to steer away from cloud-based file capture for security reasons. Speech-to-text services built into the cloud services tested are still lacking in accuracy. In some instances, remote interviewing systems allow for cloud file storage of recorded audio files to be stored directly on a cloud system like Dropbox or Google Drive. This may satisfy some issues with security.

Local File Capture

Pros: More control over access to recorded interview files.

Cons: Requires available space to store files on local hardware. Possible issues in file management if multiple interviewers are working on a collective project.

7. Backup Recording

As with in-person interviews, the interviewer may want to consider establishing a backup recording methodology for remote sessions, particularly when dealing with new technology. Backup options fall under two main categories. First, the interviewer can use physical hardware to capture the interviewee sound produced by a computer/tablet/smartphone speaker or landline speakerphone system while simultaneously capturing the interviewer's voice locally. Such options include setting professional audio recording devices/microphones near the sources of sound, or even using recording applications on a smartphone if that device is not the primary piece of equipment used for the interview. Second, if interviews are conducted on a video conferencing platform, there are a number of software options that allow the interviewer to capture a local copy of the audio or video recording. There are native software options for PC (Xbox Game Bar) and Mac (Quicktime) that allow for screen capture recording where the user defines which program or area of their screen to record, and all video and sound is captured within an MP4 (PC) or MOV (Mac) file that is stored on a local hard drive after the recording ends. There are also a number of third-party software solutions that work with various video conferencing software suites to provide expanded recording capability.

8. Visual vs Physical Signatures

Having a signed release form (and related paperwork) is essential to any interview. In-person interviewing allows for a paper copy of the release to be signed, but in a remote interviewing environment this is not feasible. Fortunately, there are many options to obtain a signed release; any particular option may work for an entire project, but you may need to customize based on what is best for each narrator.

Physical Signature

Pros:
- Accepted as secure
- Comfortable for most users
- Ensures transparency of interaction
- Does not require navigating issues with different technology capacity

Cons:
- May require an extra nudge for the narrator to complete and return the form in a timely manner

Virtual Signature

Pros:
- Good if signatures are promptly needed
- Good if any exchange of paper/mail is problematic

Cons:
- Learning curve for users
- Consider concerns when addressing any special requests, embargoes, etc. in a digital environment
- Privacy concerns
- May require navigating issues with different technology capacity

Options for Secure Remote Signing

- E-signature services
- Print, scan, and return/mobile device picture

E-signature Service Options

- [Adobe Acrobat](#) (free version or Pro paid version – $14/mo with e-signature): Newer versions of Adobe Acrobat allow the narrator to digitally sign a document using the cursor or on mobile devices, a finger. The file is then saved with the digital signature, and can be emailed or printed and mailed back. Narrators may not know about this functionality, so be sure to provide instructions if needed. Compatible with Google Drive and Box. Many organizations already have an Adobe Acrobat Pro subscription.

- [Docusign](#) (free trial or paid version starts at $10/mo for 5 signatures/mo): DocuSign lets you send, sign, and access documents and is compatible with web-based platforms, as well as Android and iOS mobile devices. One of the features Docusign promotes is that data it manages and organizes in documents are processed and stored in a system that complies with data protection protocols (more on security here: https://www.docusign.com/blog/is-your-esignature-safe). Narrators would not need

any special software to sign. Has reports of being clunky for signatories in figuring out where to sign.

- [Jotform](#) (free version – 100 signatures/mo or paid versions – starting $24/mo): Has a HIPPA compliant version as a paid subscription. Non-profit and education discounts (50%). Narrators would not need any special software. Free version can be confusing for the recipient because it encourages signing up for an account, even though it is not required.

- [Pandadoc](#) (free account – unlimited signatures or paid versions start $19/mo): Claims to have integration with Google Drive, Dropbox, and Box with all versions, as well as signature reminders. Narrators would not need any special software to sign. For security, Pandadoc states, "SOC Type 2 compliant, and all data is encrypted while in transit and at rest."

- [Qualtrics](#) (secure survey system – paid version only): Considered to have a high level of security. Not ideal for a templated form, but if content can be put into survey form, could offer a secure alternative for e-signature. Many academic organizations have institutional subscriptions to secure survey systems. Already approved applications for most IRB processes.

Physical Signature Options

- Emailing a PDF of the release form: This allows the narrator to print and sign the form, then generate an image of the signed form and return via email or physical mail. This option does require the narrator to have a printer, and additionally a scanner or another method to produce an image of the signed release form, like a mobile device with a camera. If the narrator prefers to mail the form back, be sure to include a self-addressed, stamped envelope.

- Mailing a printed release form that can then be signed and mailed back: Be sure to include a self-addressed, stamped envelope for the narrator to use to return the form.

Considerations

Programs and projects may have narrators sign release forms before any interviewing begins, while others wait until interviewing is completed, and still others wait until the transcript review is complete. No matter when you have narrators sign forms, in a remote interviewing situation, you need to properly assess this timing.

9. Elevated Level of Security

Remote interviewing options rely on information being transmitted over phone lines or internet connections and present security issues not found in an in-person interview. Situations that might require the interviewer to consider elevated levels of security include interviews that contain sensitive information, interviews with high profile individuals or people targeted for surveillance (activists, dissidents), interviews with people involved in legal proceedings, interviews that will be embargoed for a period of time, or any interview where the participant has concerns about how accessible the interview will be to the public.

Remote Interview Security Considerations

Phone recordings are likely the most secure way to conduct a remote interview, depending on how much of the connection itself is web-based. Web-based software is more vulnerable to interruptions, rights issues, and hacking of cloud-based storage. Security questions to ask concerning your project might include: Can confidentiality of the interview be assured? Is the software provider routinely recording and/or retaining content? Does the software provider retain rights over what is recorded? Where can you store the recordings for most security (see also, Cloud versus Local Recording)? Are all users up to date with the newest versions of the software? What kinds of security provisions come with the software? Can you use password protection for the connection itself? Can you use encryption to transfer files?
If you are discussing health issues, you need to consider the Health Insurance Portability and Accountability Act (HIPAA) and determine if your web-conferencing software is HIPAA compliant. Most commonly-available web-conferencing software was not created with a consideration for security and privacy rules of HIPAA. Zoom does offer a HIPAA-compliant version that requires a twelve-month minimum subscription at $200/month. You may want to check if your institution or partnering institution has such access.

Interviewers and/or project managers who are fortunate enough to have access to advisory groups or boards may want to solicit advice on handling security for sensitive interviews. For example, a university's Institutional Review Board–depending on their board make-up and their interest in the project–may be able to advise on protocols concerning sensitive communications and file transfer.

10. Access and Inclusion

How can you think proactively about inclusion and mitigate barriers to access to the tools you are using? Remote interviewing can be a key item in an inclusive oral history toolkit. Oral historians working in a disability justice framework have experience with remote interviewing from which oral historians new to the remote interviewing practice can learn valuable lessons. Disability rights activists have long worked to develop and gain access to the very tools we are all now relying on for working, learning, and communicating remotely. In acknowledging this lineage, it is important to also recognize that disabled people were often denied access to the very types of remote access now widely mandated.

It is important to think proactively about how to make sure you and your narrator can access the digital tools you are using throughout the oral history process. As you and the narrator are making decisions about the remote interview method/platform, including release forms and interview review, be sure to check in regarding any limitations in your tools, and barriers these may create for you or your narrator. This should be approached as a way of activating a narrator's expertise about their own ways of communicating and moving through the world. Note that access needs may change over the course of the oral history process, and keep lines of communication open with regular check-ins.

Understanding the accessibility features of the platforms you may use in a remote interview is work you should do before the interview process begins to better understand and meet the needs of narrators. Narrators or interviewers with hearing, speech, or visual impairments may find some platforms and modalities of interviewing more accessible than others. You may ask if your narrator has limitations on how long they can look at a screen, or sit for an interview, or if you need to plan for any interpretation or translation services.

For more information on developing an inclusive online oral history practice, please review the following:
- https://disabilityvisibilityproject.com/how-to-participate/note-on-accessibility/
- https://disabilityin.org/resource/covid-19-response-accessible-tools-and-content/

In addition, these links below are specific to accessibility in online teaching but offer things to think about that might be useful for oral history project design/interviewing:
- https://www.mapping-access.com/blog-1/2020/3/10/accessible-teaching-in-the-time-of-covid-19?fbclid=IwAR0t2ybPwNDo9xN-yI9AQNj1Wrhj5P9iutKhsqZpvJAMlKPI-P_UFcKhs7U
- https://www.washington.edu/doit/sites/default/files/atoms/files/20_Tips_Designing_Courses_5_7_20.pdf

Thank you to Nicki Pombier Berger for her assistance in writing and conceptualizing this Access and Inclusion pop-out.

Landline Recording

Introduction

This document provides an overview of approaches to recording audio conversations facilitated through landline connection devices and services. Services described include both paid and free options, many of which require the interviewer to already own a professional audio recording device to capture the signal. There are certainly other approaches beyond those mentioned here, and the selection below serves as a curated overview of only a handful of systems rather than an all-inclusive survey.

Things to know

The first tenet of landline interviews is "it's hard to make a telephone interview not sound like a telephone interview." In general, one should attempt to make the interviewee sound as clear as possible, and this typically means observing the interviewee's decibel level, as many of the recording options listed below naturally favor the interviewer's volume.

When considering your landline setup, it is important to know what sort of technology your lines employ. There are two main options: analog, which most will identify as a traditional phone line, and Voice over Internet Protocol (VoIP), which utilizes an internet connection to make the actual call. Certain adaptors and services will only work with one or the other, so make sure and investigate both your infrastructure and products to confirm they are compatible

Landline recordings are obviously missing the visual component to interviewing, therefore you may need to work extra hard to establish rapport with your interviewee. A pre-interview call can help this tremendously, as well as a brief chat before the recording begins. Try to pick up on speech habits and remember that you may have to provide longer pauses than usual to allow the interviewee to fully complete a thought.

Remember that each participant may need to hold a phone/handset up to their face for a long period of time in an oral history interview, so plan breaks accordingly, or confirm that your interviewees have access to headsets/earbuds/etc.

	JK Audio QuickTap	FreeConferenceCall.com	JK Audio Broadcast Host	Phone Speaker with Recorder
Cost	$60	Free, or "pay what you'd like"	$515	Only what you pay for your recorder/microphones
Recorded file format	Depends on audio recorder (WAV preferred)	WAV or MP3	This is not a recorder, it is a telephone/microphone interface often used in a broadcast context for merging a landline or VOIP telephone call with an XLR microphone, and sending the merged signals to an external recorder	Any format your recorder supports
File storage	SD card located in audio recorder	Downloadable link from the service	No storage	SD card used by your recorder
Internet connection requirement	None	Not required for the call, but needed to access the service online and set up the call	Does not require Internet connection	None
Required skills	Familiarity with audio recorder operation	Basic internet platform familiarity	Familiarity with audio recording equipment	Familiarity with recording equipment
Hardware Requirements	Non-VoIP landline telephone, audio recorder with 3.5mm audio input jack, male-to-male 3.5mm connector, additional telephone coiled cord	Landline or mobile phone for each participant	Telephone, Telephone cable, XLR Cable, XLR microphone, audio recorder	Landline/mobile phone with speakerphone option
Hardware Recommendations	Zoom H5 (use included XY module)	N/A	N/A	More professional landline phones will produce clearer sound, mobile phones with Bluetooth functionality can connect to external speakers for clearer sound

Pros	Simple, direct connection from a traditional landline telephone to a professional audio recorder which blends sources from each end of a telephone call into a single channel that can be captured based on the interviewer's preferred file settings	Both participants can use a mobile device, the service records for you, easy to share call-in number, can accommodate multiple interviewees	Extremely powerful for creating radio-style telephone interviews where interviewer utilizes an external microphone and the interviewee calls in via telephone	Very flexible, requires no additional investment if you already own recording equipment
Cons	Monophonic result, no on-board tools to mix audio levels	Less command over recording levels	Initial setup will require some experimentation. Certain VoIP phones may require the Broadcast Host Digital Hybrid model instead.	Audio quality suffers through a speaker/indirect recording source
Additional information	Local recording on preferred audio hardware provides a certain level of security for at-risk remote projects	FreeConferenceCall.com acts as a middleman where each participant calls into a pre-defined number. While this is very convenient for the day of the interview, interviewers may want to call interviewees directly before the interview for the pre-interview process and to provide the contact information for the future interview		Placing a recorder/microphone in front of a phone speaker is the easiest way to record a telephone interview. The main concern lies in the sound quality of your interviewee, though the interviewer quality is often quite clear.

Mobile Phone Recording

Introduction

This document provides an overview of approaches to recording audio calls made on smartphones. Options described include both paid and free software apps for phones running the Android and iOS operating systems as well as a cross-platform hardware option. There are certainly other software and hardware approaches beyond those mentioned here, and the selection below serves as a curated overview of a handful of methods rather than an all-inclusive survey.

Options are divided into two main sections, Software Options and Hardware Option. The Software Options section is further divided into two subsections, one for each of the common mobile phone operating systems, Android and iOS.

Things to know

When recording using a mobile phone the fidelity of the resulting recording is fundamentally constrained by the limited sound frequency bandwidth of mobile phone audio transmission. In addition, call fidelity is also impacted by the quality of the call connection and the capabilities of the phone's hardware. While recordings made between mobile phones can sound better than those made between landline phones, they will not have the fidelity of recordings made in-person using quality equipment, or remote recordings using some other available methods.

This stated, recording an interview using a mobile phone can be convenient and, for the interviewee, requires no technical knowledge beyond familiarity with their own mobile or landline telephone, no high speed internet connection, access to a computer, or any other additional equipment.

As noted above, call connection will impact the quality of the resulting recording. If calling mobile-to-mobile, try to determine that both parties have strong service at the time/location of the call. If calling mobile-to-landline, the Interviewer should be sure service on their end of the call is strong.

Software Options

The apps available for call recording depend on the operating system on the phone.

Android

Apps for mobile phones running the Android operating system are available via the Google Play store. There are a large number of call recording apps for Android, and determining which are best--or which work with particular phone hardware/Android versions--is difficult. In reviewing the options, we have relied on several online overviews of Android call recording apps, and we encourage those interested in recording interviews with an Android phone to robustly--and critically--evaluate apps and their claims.

	Google Voice	Automatic Call Recorder Pro
Cost	Free	Free version available, Pro version $6.99
Recorded file format	32bit/11.025kHz monophonic MP3	AMR, AAC, MP4, WAV
File storage	Google Voice cloud storage; download to local storage via Google Voice interface on a web browser	Local file storage with features to share to Google Drive or Dropbox
Internet connection requirement	Only if using Google Voice web interface to receive a call	None
Pros	Free. Vast user base. Relatively easy to install, use, and access recordings.	Option to record in 16bit/44.1kHz monophonic WAV
Cons	Low quality recordings. Can only record incoming calls.	Multitude of options and settings are challenging to navigate; sound quality is poor (though not worse than Google Voice) and caller/narrator is quieter on recording
Additional information	Google Voice seems to be the most widely used option for Android users to record phone calls. Detailed	Automatic Call Recorder Pro by Appliqato seems to be a popular option, though be sure you are

	information on using Google Voice to record can be found here: **Record Calls on Android using Google Voice**. Google Voice records at a low sample rate of 11.025 kHz, which results in noticeably low fidelity audio. The sound quality is poor, the narrator is quieter on recording, and the interviewer's voice can cause distortion if too loud. To record an interview using Google Voice the narrator is required to dial into the interviewer's Google Voice number. The interviewer then initiates recording by pressing "4" on the Google Voice dialpad. Google Voice is also an option for use on iOS devices.	downloading the correct application in the Google Play store as there are many copycats with the same name and very similar logos. It is important to experiment with this app, as the default settings do not necessarily produce the best quality recording possible. The app by default records all calls, so users probably will want to turn this function off except when recording an interview. The app records to the phone, so users should confirm before an interview they have enough storage space (especially if recording in WAV).

iOS

	Rev Call Recorder	Automatic Call Recorder Pro
Cost	Free	$3.99 monthly/$19.99 annually
Recorded file format	32bit/22.05kHz monophonic MP3	32bit/8kHz monophonic MP3
File storage	In app; download via text/email, share to Dropbox and Google Drive	In app; download via text/email, share to Dropbox or Google Drive
Internet connection requirement	None	None
Required skills	Understanding iPhone Add Call/Merge Calls functions	Understanding iPhone Add Call/Merge Calls functions

Accessibility Accomodations	Fee-based transcription of calls	Fee-based transcription of calls
Hardware Requirements	Requires iOS 10.0 or later.	Requires iOS 10.0 or later.
Hardware Recommendations	iPhone 6 or higher.	iPhone 6 or higher.
Pros	Free	Widely adopted
Cons	Lower quality recordings	Free version limited, paid version requires monthly fee. Low quality recordings.
Additional information	Rev Call Recorder is a free recording app for iPhone produced by audio/video transcription company Rev. To use Rev Call Recorder, one first dials Rev's recording line through the app, puts that call on hold, dials the Interviewee, and then merges the calls. For those unfamiliar with iPhone's "Add Call" and "Merge Call" features, it might be a bit overwhelming at first.	TapeACall is a popular, paid call recording app. The app works via a merged call process where one first calls TapeACall's recording line, puts that call on hold, dials the interviewee, and then merges the calls. The limited sampling rate of 8kHz allows for capture of sound frequencies up to 4,000 Hz, which is, curiously, below the upper end of the sound frequency band available on US mobile phone systems.

Hardware Option

	JK Audio CellTap 4C
Cost	Free
Recorded file format	Varies depending on settings of attached audio recording device
File storage	Varies depending on attached audio recording device.

Internet connection requirement	None
Required skills	Understanding of cell phone in/out connections and line-level input recording to external audio recorder. Understanding of basic audio gain adjustments.
Hardware Requirements	3.5mm input/output from phone, 3.5mm male-to-male cable, wired headset with microphone, stand-alone audio recorder, appropriate cable to interconnect CellTap 4C and external audio recorder. If your phone does not have a 3.5mm jack, acompatible adapter is required.
Pros	Affordable, professional-quality interface. Records to external recording device.
Cons	Requires familiarity and comfort with a range of audio recording methods and technologies. Requires additional hardware. Quality of recording still constrained by mobile phone audio transmission limitations.
Additional information	Produced by JK Audio, a manufacturer of remote recording products, the CellTap 4C facilitates the use of an external audio recording device to record mobile calls. Using wired connections, the CellTap 4C transits incoming audio from the interviewee and outgoing audio from the interviewer both between the parties and to a connected, stand-alone audio recorder. The user can set recording parameters on the recorder to their preference rather than being limited by the set parameters of mobile phone recording apps. Each side of the call is recorded in a separate channel of a stereo file, allowing for at least some degree of separation between voices. It is important to note that the quality of the audio captured via the mobile phone connection will still be constrained by the limitations of the sound frequency bandwidth of mobile phone audio transmission. As a result, the fidelity of the interviewee's audio channel will still be limited. In contrast, the interviewer's voice--which is recorded independently of the connected mobile phone--will sound clearer and more in line with an in-person recording. In addition, the CellTap 4C requires wired connections between the phone and the CellTap 4C. Many newer mobile phones, iPhones in particular, no longer come with wired 3.5mm jacks. To use the CellTap 4C with a phone that does not have a 3.5mm jack, one needs to purchase a compatible adapter (in the case of the iPhone, a Lightning-to-3.5mm connector) or purchase a compatible Bluetooth interface. Check with JK Audio for compatibility concerns prior to purchasing any wired or Bluetooth adapters. The cable used to connect the CellTap 4C with a stand-alone audio recorder will depend on the audio recorder's input configuration.

Web-Based Recording

Introduction

This document provides an overview of approaches to recording video and/or audio conversations facilitated through web-based systems. Options described include both paid and free software apps for PC, Mac, and mobile operating systems. There are certainly other approaches beyond those mentioned here, and the selection below serves as a curated overview of a handful of systems rather than an all-inclusive survey.

Things to know

When recording using a web-based platform, the interviewer has to consider multiple technical questions concerning not only their own setup, but for each interviewee's setup as well. While this can take a little extra time and problem solving, it can also become a relatively comfortable space to conduct an interview, as well as one of the only options in remote interviewing with the possibility of generating high-quality recordings.

When considering this option, inventory what is accessible to you and your interviewee(s) before you subscribe to something new. What are your priorities: high quality audio recording for archives/access or capturing a video exchange? Do you want to pair multiple systems to accomplish different goals? Also, you will want to consider security as web-based connections and recordings can be more vulnerable than in-person or phone interviews.

With more people connecting with colleagues and family over web-based platforms as a result of the COVID-19 pandemic, this option presents less of a barrier than it might have previously. For interviewees comfortable with computer-based systems and the thought of utilizing extra equipment, like external webcam setups, microphones, headphones, and even lighting, web-based recording can be a good option.

Remember when interviewing through web-based hardware to ensure all other audio and video playback devices are disengaged and any programs with audio notifications are closed. For other examples of logistical considerations for web-based interviewing, see the case studies for remote oral history interviewing using the Zoom platform:
- NYC Covid-19 Oral History, Narrative and Memory Project Case Study
- Columbia Obama Project Zoom Interview Process

Platform Options

When deciding which web-based platform to choose, you will want to consider video conferencing or audio-only recordings. Or a combination of both where you use Zoom or Skype to create a virtual connection between you and your narrator, and use an additional recording software to record audio. With audio-only capture, you will also want to consider whether to create an uncompressed double ending recording or use a screen-capture of VoIP audio, which will be compressed on the narrator's end.

Video Conferencing Options

Due to ease of recording, video technology, and cost, you might choose to record through web conferencing software. Most platforms have in-built options for recording audio and video. Regarding video, many VoIP services record video in Mp4, which meets preservation quality targets for many archival repositories. As for audio, since the software provider compresses the call, the result is lossy audio. If you are aiming for a higher quality audio, you may want to consider pairing multiple systems here--e.g. connecting through a video conferencing system like Zoom and simultaneously creating an audio file with a system like Zencastr or Cleanfeed (see Audio Options and/or Screen Capture options, below).

	Zoom	Skype	WebEx	TheirStory
Cost	Free, Pro ($15/mo), Business ($20/mo), Enterprise (https://zoom.us/pricing)	Free	Free, Starter ($14/mo), Plus ($18/mo), Business ($27/mo)	Family ($120/yr) Community ($1,000-$5,000/yr) (https://www.theirstory.io/pricing)
Recorded file format	MP4 (video), M4A (audio)	MP4	Free version: Webex Recording Format (WRF), Paid version: MP4	MP4 video file and WAV audio file
File storage	Local (free), Cloud (paid option)	Records to cloud	Local (free), Cloud (paid option)	Cloud storage - Files stored on Amazon Web Services (AWS), downloadable, or can sync to Google Drive
Internet connection requirement	Yes, or cellular data (mobile devices)	Yes, or cellular data (mobile devices)	Yes, or cellular data (mobile devices)	Yes
Accessibility Accommodations	Closed captioning, Keyboard Accessibility, Automatic Transcript; Screen Reader Support.	Mostly focused on visual accessibility needs, full list of accommodations based on operating system used here: https://support.skype.com/en/faq/FA1	Low vision and screen reader support. Find out more:	N/A

	"Our products are compliant, with exceptions, with the following standards: WCAG 2.1 AA Standards, Revised Section 508 Standars, EN 301 549 Accessibility requirements. See more:https://zoom.us/accessibility.	2371/what-accessibility-features-are-available-for-skype	https://help.webex.com/en-us/cfojgdb/Webex-Web-App-Accessibility-Features
Required skills	N/A	N/A	N/A	Appears to be a very low threshold for entry
Hardware Requirements	Computer or mobile device with microphone and webcam	Computer or mobile device with microphone and webcam	Computer or mobile device with microphone and webcam	Computer or mobile device with microphone and webcam
Hardware Recommendations	External webcam, microphone, lighting, headphones	External webcam, microphone, lighting, headphones	External microphone, lighting, headphones	External webcam, microphone, lighting, headphones
Pros	Vast recognition/ease of use, great buffering, video recording quality acceptable for repositories, many organizations/institutions have Business or Enterprise accounts, option to make separate audio files for each user, offers separate audio and video file instead of video only, HIPAA-compliant	In recent years, Skype has been widely used for tasks such as remote job interviews, so there is often a familiarity with it	Many organizations/institutions have Business subscriptions	Designed for oral history work, you can generate a transcription of your recording as a downloadable Word document. Strong built-in project management capabilities.

	[version](#) exists, though pricey, end-to-end encryption in beta as of Summer 2020.			
Cons	Audio quality compressed format, time limits with free version	No separation of audio/video files, poor sound quality	Conversion of WRF to MP4 requires extra steps for PC and not possible for Macs. The built in ALC (Automatic Level Control) can impact recording by cutting off the first several words/phrases of the speaker as the system automatically increases recording level.	Not scalable for individuals or organizations who only need recording function and not the full service
Additional information	Free version only allows connection up to forty minutes and does not have cloud file storage option.Try to store recordings locally for privacy. Business Plan Cloud Recording Transcriptions are low quality and need vast editing. With the recent popularity of this platform, there is some history of Zoom calls being susceptible to hackers, see more on suggestions to	Skype has the ability to record computer to phone (landline), but you may need a paid account and some extra software/hardware to accomplish this (see tutorial here: https://resonaterecordings.com/2020/04/how-to-record-skype-calls/)	N/A	This is a full-service system which offers more than access to the recording platform, they also provide interview services and training, storytelling workshops, and project management. Partners with Aviary for access.

	offset this: https://blog.zoom.us/keep-uninvited-guests-out-of-your-zoom-event/		

Audio Options

Some web-based options create "double-ender" recordings and some create low compression audio files. "Double-ender" refers to audio on both ends of a 'call' recorded locally. This is a great option because the recording is not compressed through a VoIP or telephone call, and creates lossless audio, which is of a higher quality and better for preservation and access. A "double-ender" recording can be made manually through screen capture audio recording software, or through a web-based platform like Zencastr or Squadcast.

	Squadcast	Zencastr	Cleanfeed.net
What	Web-based, audio-only recording system, creates "double-ender" recording	Web-based, audio-only recording system, creates "double-ender" recording	Web-based, audio-only recording system
Cost	No free version. $9/$17/$38 per month options. They offer education and non-profit discounts (https://squadcast.fm/pricing/)	Free (Hobbyist), $18 or $20/month (Pro) (https://zencastr.com/pricing)	Free and Pro ($22-$33/month) (https://cleanfeed.net/)
Recorded file format	44.1kHz/16-bit WAV or MP3	Free version: high quality MP3, paid version: 16-bit/44.1kHz WAV or high quality MP3	16-Bit/48kHz WAV
File storage	Automatically uploads the files to the SquadCast cloud and can be downloaded to local computer	Cloud (download from Zencaster server or save directly to Google Drive or Dropbox)	Unclear where file is stored while recording other than your browser retaining the recordings on disk, but the file is downloaded to a local computer immediately upon recording completion

Internet connection requirement	They recommend a network speed range of approximately 5-10 mbps up and down. You can run a speed test at www.speedtest.net	Ideal internet connection on both sides would be 1.5 Mbps up/down and hopefully 5 Mbps or more. You can run a speed test at www.speedtest.net	Yes
Required skills	Basic comfort level with troubleshooting microphone pairing	Basic comfort level with troubleshooting microphone pairing	Basic comfort level with troubleshooting microphone pairing
Hardware Requirements	Computer or Android mobile device (using a mobile browser app) with microphone and speakers/headphones	Computer or Android mobile device (using a mobile browser app),with microphone and speakers/headphones Operating Systems: Mac OS 10.10 or higher Windows 8.1 or higher Specs: 20GB+ of free hard disk space 4GB+ of RAM	Computer or mobile device (using a mobile browser app) with microphone and speakers/headphones
Hardware Recommendations	External microphone (optional webcam)	External microphone and headphones	External microphone and headphones
Pros	Option to open a video screen (not recorded) for better communication. Video can be disabled if needed.	Zencastr records each participant separately into their own track and has an option to control location of cloud file storage	Free version is unlimited recording time. Host can see what kind of interface guests are using and double check microphone settings. Clean interface that's reportedly easy to use. Easy to keep files private.
Cons	Not compatible with iPad or iPhone. It isn't clear where the files are being stored or what happens to them after they are downloaded from the Squadcast server.	N/A	Only compatible to host with Chrome and Safari internet browsers.
Additional information	SquadCast records all participants in a recording session locally in separate tracks. Works best with	The free version of the software lets you record up to two people and limits you to eight hours of recording per	Not a "double-ender recording." Unlike some of the other solutions where the recording is made live (e.g. Zencastr), there's no need to

the latest versions of Chrome, but also supported by Firefox, Opera, Brave, and Edge.

month. During the COVID-19 Pandemic, Zencastr has lifted limits for free accounts (although recording format options still remain the same). Zencastr works best in Chrome or Firefox. Firefox users will need to switch to "Standard Browser Privacy" (change in "Settings" under "Privacy and Security") and not use "Private Browsing Mode" in order for it to work. Video recording option currently in beta

sync up a recording at a later time. Free version is for single channel mix (both narrator and interviewer on one track). Cleanfeed offers a discounted rate for "individuals, educational, or charitable use." This platform makes use of a built-in VoIP service. The audio will still be compressed through the Opus codec Check out their FAQs for tips.

Screen Capture Options

Records audio and video as it is played on a computer. Please note that if you are using one of these programs to record a video or phone call, the audio will be compressed even if the audio file you save on your recorder or export from audio software is a WAV file. Also, be mindful that this software is recording audio/video as heard/seen on screen, so audio quality of incoming narrator audio is important. Advanced users could create local "double-ender" recordings collaboratively with narrators, meaning the narrator must also record through some kind of screen-capture audio recording software. This will require some audio engineering to sync/merge interviewer and narrator tracks. Also remember if you are recording higher quality interviews, longer interviews will require more hard drive space.

	Audacity	Quicktime (Mac)	XBox Game Bar (PC)	Open Source Broadcaster
What	Multi-track audio editor and recorder for Windows, macOS, GNU/Linux, and others	Software that creates audio or video recordings of your computer screen	Default Windows software used for video recording screen space/programs	Audio and video screen recorder
Cost	Free	Free, comes with Mac desktops and laptops	Free	Free
Recorded file format	WAV, MP3, others	AIFF (audio) and MOV (video)	MP4	WAV (audio), MP4 (video)

File storage	Local (computer)	Local (computer)	Local (computer)	Local (computer)
Internet connection requirement	Yes	Yes	Yes	Yes
Required skills	Some audio engineering skills, relatively easy to use	N/A	N/A	Some audio engineering skills
Hardware Requirements	Computer or mobile device with microphone and speaker/headphones	Computer or mobile device (Mac based systems only) with microphone and speaker/headphones	Windows-based PC with microphone and speaker/headphones	Computer with webcam, microphone, speaker/headphones
Hardware Recommendations	External microphone, headphones	External microphone, headphones	External microphone, headphones	External microphone, headphones, webcam and lighting (if applicable)
Pros	Free, easy to use, exports as WAV	Comes standard with Macs, easy to use	Despite its name, XBox Game Bar works with any PC program and is a great way to create a local copy of recordings made through various audio or video recording platforms	Lots of tutorials regarding use and choosing file formatting
Cons	With recent iOS Catalina update, some users having issues with Audacity	Not compatible with Windows systems	While created files are high quality, this does mean that longer recordings will require a good amount of hard drive space	N/A
Additional information	N/A	N/A	N/A	For Macs, latest download is for MacOS 10.13 or higher, but older versions of the software are available

A Quick Fix:

Utilizing the JK Audio QuickTap for Landline Interviews at Baylor University

Steven Sielaff

Senior Editor and Collection Manager, Baylor University Institute for Oral History

Overview
1. **Introduction**
2. **Choosing the QuickTap**
3. **Recording Process**
4. **General Advice**

INTRODUCTION

In early 2018, the Baylor University Institute for Oral History (BUIOH) decided to purchase JK Audio's QuickTap telephone handset tap in order to test the device often touted as a long-distance solution in its online workshops. Not only was this decision serendipitous considering the widespread need for alternative recording advice in the wake of the COVID-19 pandemic, it also proved a reliable methodology for a number of our interviewer partners these past years. Since the Summer of 2018, three separate projects used the device for the majority of their interviews, with the largest conducting thirty-five of the thirty-eight interviews via telephone. In this case study we will analyze the choice of the QuickTap as a landline interview solution, outline the technical setup and process of recording a telephone interview, and provide general advice in conducting landline interviews.

CHOOSING THE QUICKTAP

We chose to purchase the QuickTap primarily because of its price point and simplicity of use. Retailing at around sixty dollars, it is far cheaper than many other telephone interface devices, which typically cost several hundred dollars. In addition, the QuickTap is very simple to use. Here is the basic description from JK Audio item page:

> *Simply unplug the handset coily cord from the base of your telephone and plug it directly into the QuickTap. Then, using the supplied cable, connect the QuickTap to the base of the telephone. Now connect your audio equipment or powered speaker to the audio output jack. This jack contains a nice mix of both sides of the conversation, as well as the tones being pressed on the keypad.*

Therefore, with the Quicktap in hand, your required hardware list is simply a landline telephone and a professional audio recorder (depending on what is currently included in the QuickTap packaging, you may need to purchase an additional handset coiled cord). BUIOH uses a Zoom H5 recorder in its setup due to the ease in connecting the audio output jack and the ability to easily set levels on the XY microphone capsule, which comes standard with each H5 purchase. While we would often set up the equipment in advance for our partners, they still could easily dictate when to begin/end the recording, and when to adjust the sound level when needed. In the end, this setup became a permanent resident in an empty office in our suite so that distance interviews could be conducted at a moment's notice.

RECORDING PROCESS

1.   Find a power outlet near your landline phone and plug in your audio recorder (we used the Zoom H5).

2.   For the Zoom H5, insert your SD card and power the unit on. Using the supplied XY microphone capsule, select the L/R recording option by pressing the "L" button on the face of the recorder. If selected correctly, the red lights above the "L" and "R" buttons should illuminate. Select other recording options within the Zoom H5 menus as specified by your institution, such as track length and file type. We recommend a minimum recording format of WAV 16/44.1.

3.   Connect the 1/8" (3.5mm) Mono Audio cord (supplied by JK Audio) to the "Output" jack of the QuickTap and to the "Line In" jack of the Zoom H5 capsule.
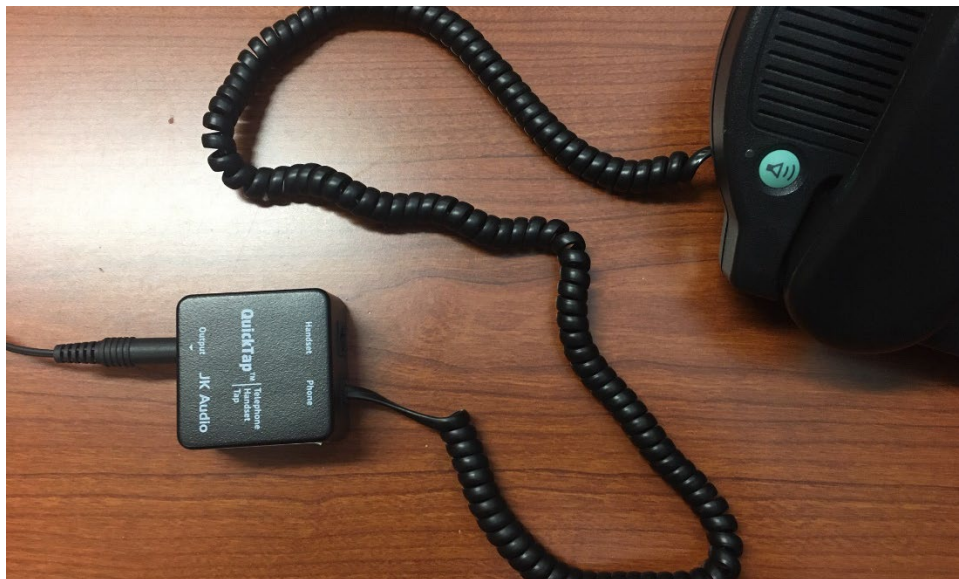
4.   Disconnect your landline phone's coiled cord from the handset and connect it to the "Phone" jack on the QuickTap.

5. Connect a handset coiled cord the handset, then connect the opposite end to the "Handset" jack on the QuickTap.

6. Take the phone off the hook and let the dialtone sound. Use the sound level of the dialtone dictate how to set your sound levels on Zoom H5. In general, we recommend adjusting the dialtone level to around -6 db.

7. Place your telephone call and converse with your interviewee a bit to observe the levels of the conversation, adjusting the Zoom H5 or telephone/handset volume levels as needed.

8. When ready to record, press the red dot "Record" button on the Zoom H5. The red light near it should illuminate, and a running timer should be visible at the top of the screen.

9. To stop or pause the recording, press the white square "Stop" button. We recommend stopping recordings entirely when taking a break, then restarting the process when ready to continue. Many recorders have "Pause" buttons, but these can lead to confusion as whether the device is recording or not.

10. When finished with the interview, power off the Zoom H5, then remove the SD card. The recording files should be located in the following directory: DISK NAME:\STEREO\FOLDER01. If you paused during the interview, or if you set a limit to track length, there should be multiple files located in this folder.

One aspect of this recording to keep in mind is that the QuickTap merges input from two lines into one, so that that resulting recording is monophonic. When using the Zoom H5, this is captured as a single channel in a dual-channel recording. When processing this audio, BUIOH will copy this data channel and create a dual-mono master. You could alternatively simply create a traditional monophonic master.

GENERAL ADVICE

- BUIOH always prefaces telephone interview instruction with the line "it's hard to make a telephone interview not sound like an telephone interview." You can listen to this clip from a recent BUIOH webinar to see what we mean. In general, we advise to err on the side of making the interviewee sound as loud and clear as possible. With the QuickTap, this means watching your sound levels, and turning your local volume down to match your interviewee's volume level as best you can.

- Landline recordings are obviously missing the visual component to interviewing; therefore you may need to work extra hard to establish rapport with your interviewee. A pre-interview call can help this tremendously, as well as a brief chat before the recording begins. Try to pick up on speech habits and remember that you may have to provide longer pauses than usual to allow the interviewee to fully complete a thought.

- Distance interviewing means signing official paperwork at a distance as well. In general, BUIOH will email a digital copy of our deed of gift statement to interviewees to review before the interview so that any questions can be fielded before recording begins. If you have any other project-related materials to share, these can be emailed as well.

- Remember that each participant will may need to hold a handset up to their face for a long period of time in an oral history interview, so plan breaks accordingly.

Columbia Obama Oral History Project

Zoom Interview Process

Overview

1. **Roles and Process**
2. **Setting up the Pre-Call**
3. **Setting up the Zoom Meeting for the Interview**
4. **During the Pre-Call**
5. **Hosting the Interview**
6. **Processing Files**

INTRODUCTION

The Obama Oral History Project began the process of collecting interviews before social distancing measures were being enforced in the U.S. A handful of interviews were already completed in person but most were planned for the spring and summer of 2020 and so we had to change our interview process and shift to remote recording. As this was an on-going project we were looking for something that we could start using quickly and that would be easy to use for a wide range of people.

Zoom stood out as a good option for many reasons. Because the project is run through Columbia University, we are able to use a HIPAA compliant version of Zoom for no additional charge, allowing us to protect the narrator's privacy and have an unlimited amount of meeting time. We also knew we wanted a platform that would allow the narrator and interviewer to see each other. Zoom allowed for this and also gave us a way to record video and audio at a relatively good quality. Lastly, Zoom is a platform that many people are familiar with and have access to. In most cases, it would not require narrators to learn and use unfamiliar technology and allowed us to transfer to online interviews quickly.

We have taken a couple steps to increase the quality of these online interviews. The first is that we send narrators a USB microphone to plug in to their computer. This microphone requires relatively simple set up and greatly increases the audio quality. The second factor we have introduced is the role of the "host" of the interview. This is a third person who sits in on the interview to monitor the quality of the interview and assist with any technical needs. This person is also responsible for making sure both the narrator and interviewer feel comfortable with the set up and all of the technical elements. This person has become instrumental in helping us maintain high-quality recordings across all of our interviews. The document below is written to instruct someone filling the position of the "host" in this process.

ROLES AND PROCESS

Three different roles are required to set up and host these interviews: the coordinator, host, and interviewer. In some cases the coordinator can serve as one of the other two roles as well.

Coordinator: Makes initial contact with the narrator and is responsible for connecting them with the Interviewer and Host. They help to solidify dates and order the microphones.

Host: Is connected with the narrator to learn the narrator's tech needs, make sure they know how to use the microphone once it arrives, assure that their camera quality is sufficient, and that they feel comfortable with the security and privacy of the interview. They host both the pre-call to discuss technical concerns and the main session where their camera and mic will be off. They monitor the quality of the call, and if there are any issues they message the interviewer.

Interviewer: Sends an interview agenda a week before the interview. Conducts the interview and thanks the narrator afterwards. Connects with the coordinator to see if they want another session.

Below is an overview of the responsibilities of each person within the process of managing the technical aspects of the interview.

1. The Coordinator invites the Narrator.
2. Once the Narrator accepts a Zoom interview, the Host is looped in to:
    a. Describe next steps
    b. Request an address for mailing the mic
    c. Determine if they also need an adapter if they are a Mac user
3. Coordinator orders mic for Narrator. The interviewer will already have a microphone.
4. The Host suggests a range of dates for the pre-call and interview (should be one to three days before the interview) that work for the interviewer and are 15 business days after the mic was ordered.
5. Once the date is selected, the Host sets up the Zoom interview (with password), and the Zoom pre-call (no password). They will be using the HIPAA version of Zoom which has additional security.
6. During the pre-call the Host tells the Narrator the password (*do not email it)* and additionally:
    a. Verify that everything works and the interview can go ahead
    b. Request a signed release if they have not sent one in
7. After the pre-call, the Host shares the Zoom interview link and cell numbers for the Host and Interviewer with the Narrator.
8. Before the interview, the Host arrives about twenty minutes early in case Interviewer would like to do a tech check, or in case Narrator arrives early
9. A back-up recording should also be made for every interview by the Interviewer or Host. This can be done through [Soundflower](#) (Mac only). All of our Interviewers used iOS systems, so no other back-up recording technique has been tested in this project.
10. After the interview the Coordinator handles deciding on next steps.

<div align="center">

SETTING UP THE PRE-CALL

</div>

- The pre-call should be set roughly three days before the interview.

    Email template:

The next step is for [Narrator] and I to set a time for a brief Zoom conversation a couple days before the interview to walk through some technical considerations, like internet connectivity, audio, and video.

If [Narrator] would be comfortable receiving a package from us, please let me know the best address to mail it to [you, him, her], as well as a contact number to provide the carrier. We would send a USB microphone in advance of the interview, in order to capture the best possible sound we can.

Does your computer have a USB connection, or will you require an adapter for the microphone?

● Once you have the Narrator's address, order a mic to arrive in advance of the pre-call date. Send a follow-up email to the narrator with more details.
  ○ Include the Zoom link for the pre-call. No password is needed for the pre-call.
  ○ Attach a copy of the release form, if they haven't already signed it, and include a polite reminder to sign it.

Email template:

During your interview, we will record both the audio and video from the Zoom conference (unless, of course, you would prefer not to have the video recorded). When you and I check in before the interview, we can do the following:
- Walk through setting up testing the USB microphone.
- Double check that the internet connection is strong, and the interview conversation will transmit smoothly.
- Assess any sources of ambient noise that could disrupt the interview.
- Optimize for the best image possible by adjusting placement of the computer's camera, moving potentially distracting background objects, or considering available lighting sources.
- Security and privacy of the conversation are a high priority for us. So I'll also provide a password for the Zoom interview when we speak in advance, rather than sending it in an email.

● Send the mic's instruction sheet (either for Mac or PC) in advance of the pre-call.

*If they need an adapter for the mic's USB connection, order that and send it to arrive with the mic if possible, but at least before the pre-call.

SETTING UP THE ZOOM MEETING FOR THE INTERVIEW

● Assign the Interviewer as an alternative host
● Require a password for the meeting. The password should be all lowercase text and consist of two random words separated by a period. The words should be easy to

communicate, and spell correctly, via a phone conversation. Avoid words with homonyms, or that could be easily misheard as something else.

- Enable "join before host"
- Make sure the video is set to automatically turn on
- Set audio to come only from a computer, and not also from a phone
- The start time of the meeting should match the Narrator's time zone.
- Under advanced options, unclick "Automatically record meeting on local computer"
- When copying and sending the meeting invitation details (or posting them to Google Calendar) REMOVE THE PASSWORD and replace with text that says "Call Host for Password." Also, alter the meeting link so that the password is not embedded.
  - Example: https://columbiauniversity.zoom.us/j/789608842<mark>?pwd=MWpyOUhzMUtlY3hjZzg4 MnpUZnA1dz09</mark> (delete everything from the "?pwd" part of the link to the end)

DURING THE PRE-CALL

- **Provide the password** the Narrator needs for the Zoom oral history interview. This can be offered over the phone or by text but cannot be emailed to them. Screen sharing to show the text of the password while telling it to them is also effective.
- **Set up the mic together** and troubleshoot any issues. Do a sound check and make sure the levels sound right and they feel confident with it.
  - Mic should be out of the video shot
  - See Audio Setup Checklist for what to discuss
- **Walk them through the settings** to have the audio output in Zoom be to their built-in computer speakers rather than the mic (unless they need to wear headphones during the interview, in which case they can plug the ⅛" jack directly into the Yeti Mic, and leave the mic as their output. If they have Bluetooth headphones, they would need to adjust this in their settings as well). It is helpful to share screenshots of this during the conversation or share the screen in Zoom to show the Audio Setup Checklist document.
- **Listen for any issues** with internet connectivity during the conversation. If there are persistent issues with audio distortion, frozen video streaming, or audio dropping out entirely, then it may be necessary to recommend that the interview not move forward.
- **Talk about their environment.** Would they expect any background noise to arise during their two-hour interview session? Are they in a room with a door that can be closed for privacy? Do they have any pets that would need to be sequestered? Are there other audible sounds from HVAC, refrigerators, lights, or other sources?
- **Provide silence notifications.** Remind them that during the interview, their phone should be silenced, as well as any alert sounds (such as notifications) on their computer.
  - For PC users, here is a guide to silence notifications
  - For Mac users, here is a guide to silence notifications
- **Discuss video recording options.** In most cases, the Zoom interview will also record video. Some narrators will opt out of this option, however. Even if the video is not recorded, the interviewer will need to be able to see the narrator clearly. If this isn't

possible, then it may be necessary to recommend that the interview not move forward as planned.
- ○ If they plan to record the video, offer some tips for getting the best image possible. Look for distracting background objects that could be moved or covered. Discuss whether the position of the webcam can be adjusted (level with their eyes is ideal). Lighting in front of the narrator's face rather than behind their body is also best. Also, if it is possible, get some depth of space in the room behind them (not directly against a flat wall would be preferable).
- **Discuss the release form.** If they haven't signed a release form yet, remind them to do this and provide the document if they don't have it.
- **After the call**, send them a link for their oral history Zoom call. Also give them a phone number where their host and their interviewer can be reached.

HOSTING THE INTERVIEW

Before Starting
- Turn off computer notifications, or if that is not an option, silence them
- Sign in about twenty minutes early in case the Narrator or Interviewer arrives early or has questions. Be available to answer phone and email (provided to the Narrator in advance) in case the Narrator or Interviewer are having trouble and need to reach you.
- If the Narrator or Interviewer experiences technical difficulties that persist for more than ten minutes, gently suggest rescheduling for another day. It's important that this be a pleasant, and not frustrating, experience for either party.
- Pin your video on the Narrator

Beginning the Interview
- Take a brief moment to confirm that both are ready to begin. Start the backup recording first. Set screen to "speaker view." Interviewer and Host may need to silence themselves while the Narrator is talking so that their video is the one being recorded.
- Let them know that you will hit record, then mute yourself and hide your video. You will be listening if they need anything, but the Interviewer will take it from there.
- Monitor the recording and the audio quality carefully throughout the interview. In the event that adjustments are needed (level adjustments, background noises, etc.), private message the interviewer or politely and briefly interrupt the interview to address the issue.

Ending the Interview
- Once the interview is complete, stop the recording, and reappear to say thanks and farewell.
- When you end the meeting, Zoom will ask you where to save the audio and video files. Connect to the server and save them to the appropriate folder. If the narrator requested no video recording, delete the video file.

Backup Recording *(in case Zoom recording fails)*

- Sunflower (only for iOS)
  - Install Soundflower [plugin](#)
  - Open Audio Midi Setup (in Applications)
    - Click the + button and select "Create Multi-output Device"
      - Select "Soundflower ch2" and whatever other device you will be using to monitor the sound (headphones, speakers, etc.)
  - In System Preferences select Sound > Output and click "Multi-output Device"
  - Open Quicktime and select File > New audio recording. Next to the red record button click the drop-down menu and select "Soundflower ch2." Note that this will record all system sound (so turn off your notifications) and is not able to capture your microphone.
- External recording device
  - You can also use an external recording device to record the audio.

Audio / Video / Recording Settings for the Zoom App
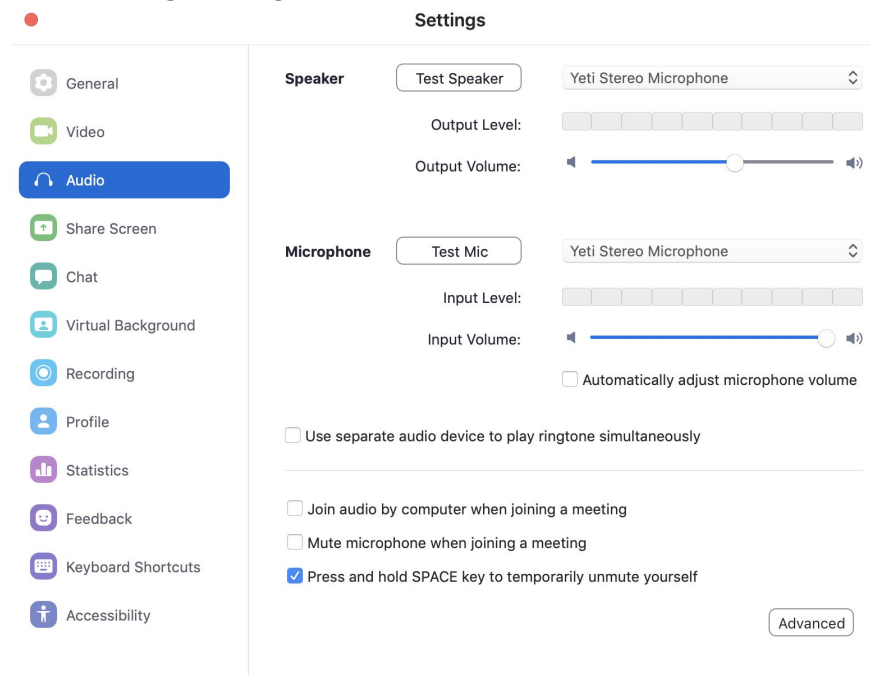
In the settings menu, choose "Audio". For both "Speaker" and "Microphone" select Yeti Stereo Microphone and adjust output volume to correct level.
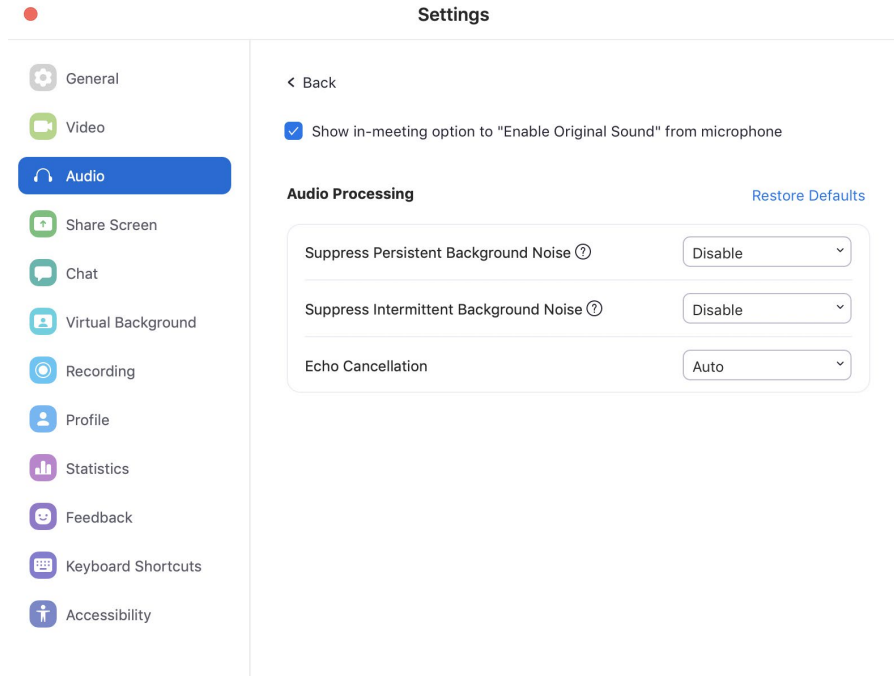
Within the Audio tab of the Settings, click on "Advanced." Enable "Show in-meeting option to 'Enable Original Sound' from microphone. Disable "Suppress Persistent Background Noise" and "Suppress Intermittent Background Noise" and make sure "Echo Cancellation" is set to Auto.
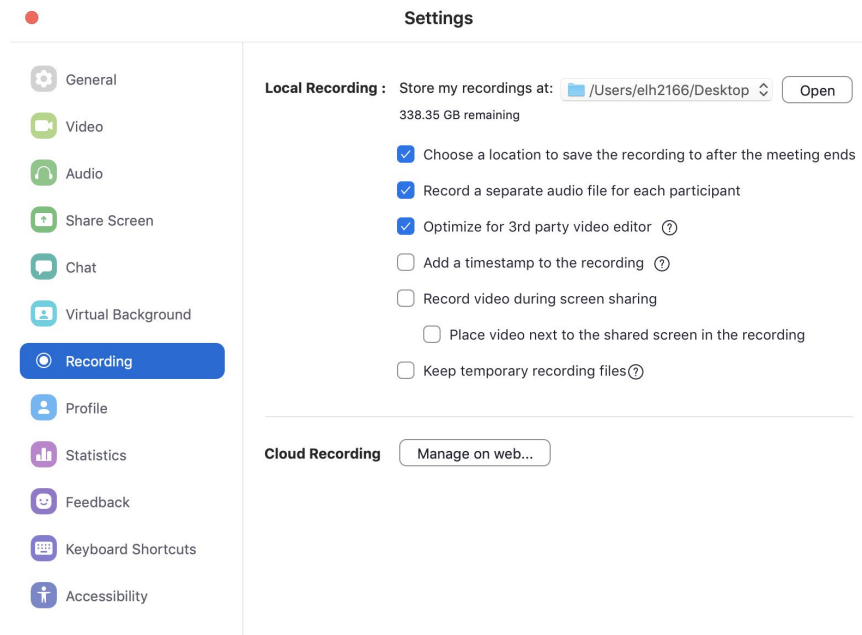
In the settings menu, choose "Recording". Enable "Choose a location to save the recording to after the meeting ends," "Record a separate audio file for each participant," and "Optimize for 3rd party video editor."

PROCESSING FILES

Using your audio editing software of choice, take the m4a files and line them up as separate tracks, then export both tracks as a single stereo track as both mp3 and WAV. These can serve as your preservation and access files.

NYC COVID-19 Oral History, Narrative, and Memory Project

Zoom Interview Process

Overview
1. **Introduction**
2. **Setting up the Zoom Meeting**
3. **Hosting and Recording**
4. **After the Interview**

INTRODUCTION

The NYC COVID-19 Oral History, Narrative, and Memory Project was created with the expectation that we would be conducting remote interviews only, at least in the first phase of our work. In fact, our IRB approval initially prohibited us from any in-person contact as part of the project - we could not even use flyers for recruitment.

Oral history is usually excluded from IRB review at Columbia, but because we are using a multi-disciplinary approach which includes surveys and written chronicles, and because we wanted extra guidance when working in such a volatile time, we did go through an IRB approval process. Participants fill out a survey to begin the oral history process, which includes consent forms and legal releases. Once they complete the survey, they are sent a counter-signed copy of their legal release for their records, and their interviewer contacts them to schedule a session.

When we began planning this project we felt an intense urgency to begin conducting interviews right away. Things were changing so fast, and we wanted to be able to capture people's experiences of the first wave of the pandemic in New York City before they knew what would happen next. This was especially important because some of our research questions were built around the creation of historical narratives in times of disruption, and how relationships between the past, present, and future shifted during the pandemic. Therefore, many of our decisions around how to do remote interviewing were made in the interest of expediency; we prioritized an easy, low-friction, low-cost approach.

We felt it was important to use a video conferencing tool so that narrators and interviewers could see each other, and we chose Zoom because it was one that was widely familiar within a few weeks of the onset of the pandemic, because we had experienced it as reliable, and because our institution could provide us with a subscription. We allow interviewers to use their own account or a shared project account, which is pre-set with the settings we are using for the project, and is accessible to team members on a first-come, first-serve basis. We also wanted a tool that worked on smartphones as well as laptops to increase accessibility. We decided to use Zoom alone, rather than using an additional higher-quality audio recording tool like Zencastr, to keep things simple for our interviewers and narrators. We also felt that, because our project was about the pandemic, audio quality typical of a video call would be sufficient. We began this project as much of social life was shifting online, and learning to

interview online has been, for us, a part of a larger process of learning to interact and collaborate via video chat.

We started without external funding, using staff shifted from their usual responsibilities due to the pandemic. Within a few weeks, we received funding from the National Science Foundation, but in order to work at the scale we planned we needed to keep the budget lean. Also, because of the need to work fast, we opted to use the equipment narrators and interviewers already had in their homes.

Because oral history interviews are dialogic, we wanted to take advantage of the chance to be able to see the interviewer and the interviewee at the same time, so we record in Zoom's gallery view. We also wanted to record the speaker in the highest possible quality, so we also record in speaker view.

So far we have found that Zoom works well for most people, although both the survey and Zoom have been less accessible to smart phone users and those with less experience with these technologies. Often this corresponds to class limitations, and so we are concerned that the way our project is structured creates barriers to participation for people who are low-income, people with less formal education, and people with some disabilities. We have created a process where if necessary narrators can skip the survey and give verbal consent with their interviewer in order to somewhat mitigate this issue. Going forward, as we are able to slow down a bit, we may consider changing our process to be more intentional about capturing higher quality audio and video, but we have been happy so far with the outcomes using our current process.

SETTING UP THE ZOOM MEETING

- Schedule a Zoom interview and send the participant a link. The title of your Zoom interview should be: "Your Name - Interviewee Name - Interview # - Date and Time"
- You can use the project Zoom account or your own
  - If you use your own, make sure your Zoom settings for recordings look like this:

Cloud recording   ⬤

Allow hosts to record and save the meeting / webinar in the cloud

○ Record active speaker with shared screen

○ Record gallery view with shared screen ⑦

☑ Record active speaker, gallery view and shared screen separately

    ☑ Active speaker

    ☑ Gallery view

    ○ Shared screen

☑ Record an audio only file

☑ Save chat messages from the meeting / webinar

Advanced cloud recording settings

○ Add a timestamp to the recording ⑦

○ Display participants' names in the recording

☑ Record thumbnails when sharing ⑦

☑ Optimize the recording for 3rd party video editor ⑦

○ Audio transcript ⑦

☑ Save panelist chat to the recording ⑦

Automatic recording   ◯

Record meetings automatically as they start

IP Address Access Control   ◯

Allow cloud recording access only from specific IP address ranges

Only authenticated users can view cloud recordings   ◯

The viewers need to authenticate prior to viewing the cloud recordings, hosts can choose one of the authentication methods when sharing a cloud recording.

Require password to access shared cloud recordings   ⬤

Password protection will be enforced for shared cloud recordings. A random password will be generated which can be modified by the users. This setting is applicable for newly generated recordings only.

- For the recording settings you should:
  - Make sure that Zoom is recording to the cloud
  - Confirm that a password is required to access the cloud recording
  - Confirm that the recording is optimized
  - Confirm that you are recording the active speaker with shared screen and gallery views
- For microphones:
  - If you have access to a better microphone such as a headset or a USB mic, use that over your computer's built in mic. Encourage your narrator to do the same.

HOSTING AND RECORDING

- Start recording as soon as you start the meeting but notify your narrator that you are recording. It is useful for others to see the way you and the narrator are interacting as you settle into the formal session.
- Use the project interview guide to shape your conversation
- If going off the record or taking a break, pause the Zoom recording instead of stopping it

AFTER THE INTERVIEW

- Once the interview is finished, if you are using your own account go to "Recordings" on the Zoom website (not in the app) to retrieve the link for the recording. The recording might not show up right away, or even for a few hours.
- Copy and paste this information along with the password that is created by including the by clicking the "share" button. Send the link to the file to the project coordinator for archiving.
- Write brief fieldnotes and submit them with the interview (you are of course welcome to save a different version for your own use). Your fieldnotes could include some mix of the following:
    - Notes on your relationship with the person
    - Context of the moment in time when the interview was done, if not on the tape (e.g. it was the day when the peak was predicted, or it was our third week of social distancing, etc.)
    - Your own subjective experience of the interview - feelings, expectations, surprises
    - Your impressions of the content and highlights of what was shared
- Write your participant a follow-up email

Vermont Folklife Center Listening in Place Project

Rev Call Recorder Telephone Interview Process

Overview

1. **Roles and Process**
2. **Coordinating Interview**
3. **Setting Up Rev Call Recorder**
4. **Conducting and Recording Interview**
5. **Processing Files**

INTRODUCTION

The Vermont Folklife Center (VFC) initiated the Listening in Place (LIP) project in direct response to the emergence of COVID-19 in the United States as a way to encourage Vermonters to maintain interpersonal connections remotely during the winter/spring stay-at-home period of the pandemic. LIP (http://vtfolklife.org/listening) encompasses four overlapping facets, three of which foster interview-based communication between residents of the state. Due to the nature of the pandemic, LIP encourages remote interviewing between people not residing in the same household and offers suggestions for platforms and software for recording. The ubiquity of cellphones led us to identify a number of free and paid options for call recording apps on both Android and iOS. This case study outlines our experience using Rev Call Recorder for iOS.

Rev Call Recorder is developed and maintained by the speech-to-text/audio and video transcription company Rev (http://www.rev.com). Their free recording tool serves as a gateway to the company's paid media transcription services. This case study is based on the use of Rev Call Recorder 1.18 on a 2020 iPhone XE running iOS 13.5.1 on the AT&T network. Due to poor cell service, calls have been made with "Wi-Fi Calling" engaged. Internet service at the site is provided via Comcast, and local Wi-Fi via a Netgear R6400 router using the 2.4GHz band.

We selected Rev Call Recorder for the project after conducting research into several free call recording apps available for iOS. Based on our investigation, Rev Call Recorder emerged as one of the most widely adopted and best reviewed free options available for cellphone-based call recording on iPhone.

Rev Call Recorder generates a monophonic 32bit 22.5kHz MP3 file of the recorded call, allowing it to represent the dynamic range and limited sound frequency bandwidth of cell phone audio transmission. While recordings made using Rev Call Recorder are superior to old landline telephone recordings, they are inferior to in person recordings made with quality gear.

We employ Rev Call Recorder in a specific facet of LIP—what we call "Virtual Vox Pops" (http://vermontfolklifecenter.org/virtual-vox-pops). Rather than provide an overview of the use of Rev Call Recorder in the specific context of LIP and Virtual Vox Pops, this document provides a generic, practical overview of the use of Rev Call Recorder for remote interviews on iPhone with reference to VFC approaches.

Rev Call Recorder works via a merged call system—first the Interviewer dials the Rev recording line via the app, then, using the "Add Call" button in the iOS Phone app, puts the recording line on Hold and makes a separate call to the Interviewee. Once contact has been made with the Interviewee and both parties agree to begin recording, the Interviewer uses the "Merge Calls" button on the iOS Phone app to merge the two calls and recording commences.

While in the United States federal and many state laws do allow for "one party consent" in regard to telephone call recording, the requirements of ethical engagement with our research partners supersede these legal distinctions. In the context of interviewing for oral history, ethnography or any qualitative research process, receiving consent to record from interviewees prior to initiating recording is an ethical necessity. Do not record telephone interviews without getting direct permission from the interviewee prior to commencing recording of the call.

ROLES AND PROCESS

Two roles are required to set up and host these interviews: Interviewer and Interviewee

Interviewer: Coordinates scheduling of interview. Conducts the interview, thanks the Interviewee afterwards and provides Interviewee with a copy of the recording.

Below is an overview of the responsibilities of each person within the process of managing the technical aspects of the interview.

1. The Interviewer and Interviewee communicate regarding scheduling of interview and the potential scope and content of it
2. Prior to the interview, Interviewer shares release form (electronically or via mail) with Interviewee and explains the consent procedure
3. Interviewer calls Interviewee on appointed day at appointed time, informs Interviewee prior to initiating recording, and initiates recording when approved by Interviewee
4. Interviewer delivers copy of recording to Interviewee

COORDINATING INTERVIEW

- Initiate contact with Interviewee in accordance with personal or institutional approaches. For the Virtual Vox Pop facet of the LIP project, Interviewees filled out an online form to request an interview with a VFC staff member. Staff members responded to these submissions via email.
- Finalize date and time of interview

SETTING UP REV CALL RECORDER

Rev Call Recorder is accessible via the Apple App Store. To download and install the app on your phone you will need to know your Apple login and password. We recommend making several test calls prior to the interview to familiarize yourself with the app.

CONDUCTING AND RECORDING INTERVIEW

- Open Rev Call Recorder app:
  - Select "Start Recorded Call"
    - Select "Outgoing Call"
    - Select "Call Rev's Recorder"
  - iOS Phone app dials the Rev's Recorder telephone number. A beep will sound indicating that the call has connected.
  - Select the "Add Call" button
  - Dial Interviewee's telephone number
    - Greet Interviewee, inform them that they are not yet being recorded. When they are ready for recording, tell them they will hear silence for a few moments and then recording will begin.
  - Press the "Merge Calls" button. This will merge the call to the Interviewee with Rev's Call Recorder line and begin recording.
  - Return to merged call, begin interview
- At conclusion of interview, Interviewer hangs up, ending the call and the recording

PROCESSING FILES

Accessing the Recording
- Immediately after completing your call, the recording will be available in the app for download. Audio files are identified with a date and time (e.g. "5/21/2020, 2:01 PM"). To download:
  - Tap on the appropriate file, this will open the audio player and display a "Transcribe" button. To the left of the button is an upload button—a small image of a rectangle with an upward pointing arrow.
  - Click on the upload button
  - Click on the "Share Recording" button
  - Chose how you would like to send the file. Options will differ depending on apps installed on phone, but standard options include sending the file to a computer using AirDrop, sending it in an iMessage or SMS, or via email.
  - Retrieve the file and save it to your computer

Saving and Naming the Files
- Rev Call Recorder generates a monophonic 32bit 22.5kHz MP3 file
  - Open the file in the audio editing software of your choice.
    - There will be a period of recorded silence at the head of the file captured during the time the Rev's Recorder line was on hold. Delete this silence if you wish.

- Save file as a 24bit 44.1kHz mono WAV. Name the file in accordance with your own or your institution's file naming protocols. This will be your preservation file.
- Save an additional MP3 version of the file. This will be your use copy and the version you share with your Interviewee.
- Rename the original file in line with file naming protocols and save it along with the others as the original source file.

Sharing Recording with Interviewee
- Contact the interviewee and ask how they would like to receive their copy of the interview recording. VFC options generally include Dropbox, Google Drive, or via mail on a USB thumb drive, SD card, or CD- or DVD-R.

Vermont Folklife Center Listening in Place Project

Zencaster Interview Process

Overview
1. **Roles and Process**
2. **Coordinating Interview**
3. **Setting up Zencastr**
4. **Conducting and Recording Interview**
5. **Processing Files**

INTRODUCTION

The Vermont Folklife Center (VFC) initiated the Listening in Place (LIP) project in direct response to the emergence of COVID-19 in the United States as a way to encourage Vermonters to maintain interpersonal connections remotely during the winter/spring stay-at-home period of the pandemic. LIP (http://vtfolklife.org/listening) encompasses four overlapping facets, three of which sought to encourage interview-based communication between residents of the state. Due to the nature of the pandemic, LIP encourages remote interviewing between people not residing in the same household and offers suggestions for platforms and software for recording. This case study describes our experience with Zencastr (https://zencastr.com), a web-based recording and podcasting platform.

Why we chose it: Choosing the best remote recording platform has much to do with the person you're interviewing, the technological resources they have at their disposal, and their comfort level with that technology. While the general public is increasingly proficient with Zoom as a remote conferencing tool, and recording through Zoom is very easy to do, the sound quality is not great mostly due to latency issues. The Zencastr platform was originally designed for podcasters, offering a simple way to record hi-fi, audio-only interviews and discussions between two or more users. Some Zencastr users will also host a simultaneous video conference with muted audio--via Zoom, Google, or some other platform--so that the Interviewer and Interviewees can see as well as hear one another. As of 2020 the company is currently beta testing a new video-recording option. Zencastr's strength lies in the fact that each individual's audio track is recorded locally (to each individual's computer) and then the individual tracks are made available to the administrator through their Zencastr dashboard.

We have used Zencastr in a specific facet of LIP—what we called "Virtual Vox Pops" (http://vermontfolklifecenter.org/virtual-vox-pops), and also to conduct remote interviews for our podcast, VT Untapped (http://vermontfolklifecenter.org/untapped). This document provides a generic, practical overview of the use of Zencastr for remote interviews.

How it works: From the dashboard of the Zencastr platform Interviewers/hosts are able to invite guests to an interview and control when to start and stop the recording (when you hit record the program starts recording everyone in the remote interview simultaneously). Interview guests receive an email with a link inviting them to the recording session. The link opens the recording platform automatically; guests do not need to download anything in advance. Once guests follow the link and are connected to the Zencastr platform they will be able to hear and speak with the host and any other guests in the interview. Recording does not start automatically; the host must start the recording manually.

ROLES AND PROCESS

Two roles are required to set up and host these interviews: Interviewer and Interviewee

Interviewer: Coordinates scheduling of interview, conducts the interview, thanks the interviewee afterwards, and provides interviewee with a copy of the recording

Below is an overview of the responsibilities of each person within the process of managing the technical aspects of the interview.

- The Interviewer and Interviewee communicate regarding scheduling of the interview and the potential scope and content of it

    a. The recording platform that will be used is dicussed. Both parties must have a high-speed internet connection, a built-in computer microphone ,and use Chrome or Firefox as a web browser. Headphones or earbuds with a built-in microphone are strongly recommended.

- Prior to the interview, Interviewer shares release form (electronically or via mail) with Interviewee and explains consent procedure

- Interviewer emails Zencastr interview link to Interviewee on an appointed day, at least one day in advance, informs Interviewee prior to initiating recording, and initiates recording when approved by Interviewee

- Interviewer delivers copy of recording to Interviewee

COORDINATING INTERVIEW

- Initiate contact with Interviewee in accordance with standard personal or institutional approaches. For the Virtual Vox Pops facet of the LIP project, Interviewees filled out an online form to request an interview with a VFC staff member. Staff members responded to these submissions via email. Interviews for the podcast are requested by staff and scheduled via email or phone.
- Finalize date and time of interview

SETTING UP ZENCASTR

Pricing:
To start you'll need to make an account at the Zencastr website (https://zencastr.com). The software offers two pricing tiers:

- Hobbyist – Free Normally the free version of Zencastr limits users to two guests and up to eight hours/month of recording time. As of early March 2020 and the onset of COVID-19, the company has lifted these restrictions and it appears they will remain lifted as the pandemic continues. With the Hobbyist plan you can only record in "high quality .mp3" format and pay-per-project access to post-production tools such as audio mixing and audio enhancements.
- Professional - $20/mo or $216/year The Professional plan includes unlimited guests and recordings, access to a live editing soundboard, ability to record in "high quality .mp3" or 6-bit 44.1k WAV format, and allows for ten hours automatic postproduction per month

VFC has been using a Hobbyist account since early March so this case study only covers use of features included within that plan*

Set-Up:
- Ensure that you are in a quiet space where you won't be interrupted. We highly recommend wearing headphones or earbuds with a built-in microphone during the interview. Communicate these suggestions to your Interviewee(s) as well.
- We recommend making several test calls prior to your interview to familiarize yourself with the app

CONDUCTING AND RECORDING INTERVIEW

Because Zencastr is geared towards podcast producers its terminology refers to recording sessions as "episodes"*

- Interviewer signs into Zencastr
  - From the Dashboard select "Create New Episode"
    - Give episode a name
  - From within New Episode click "Invite" and enter names and e-mail addresses of interviewees
    - If you need to resend the link to the Episode click on "Invite" and "Copy Invite Link"
  - When interviewee has signed-in to the interview their name will appear on your interface and you should be able to voice chat with them
    - Greet Interviewee and inform them that they are not yet being recorded. When they are ready for recording, tell them they will hear silence for a few moments and then recording will begin.
  - When you're ready to record click "Start Recording"

- At conclusion of interview, Interviewer clicks "Stop Recording." You will still be able to chat with your Interviewee to thank them and say goodbye.
- It is a good idea to exchange phone numbers with your interviewee ahead of time so you can reach them in case of any technical difficulties

Tips to Give Interviewees:

- Remind people that recording will work best if all parties are in a quiet space, and preferably wearing headphones or earbuds with a built-in microphone (although this is not necessary for the recording to work)
- Zencastr works best in Chrome or Firefox. Firefox users will need to switch to "Standard Browser Privacy" (change in "Settings" under "Privacy and Security") and not use "Private Browsing Mode" in order for it to work.
- When they're ready to do the interview all they need to do is click on the link they received in the invitation email (make sure you send the link well in advance)
  - Interviewee will be prompted to allow access to their microphone in the upper-left-hand side of the screen — they should do this. If using Firefox, ask them to select the "Always Allow" option.
  - Zencastr will run a "health check" to make sure all users have sufficient bandwidth for the software to work
  - Once the health check is complete the Interviewee will be able to hear you and voice chat with you before the recording begins

PROCESSING FILES

- Immediately after completing your interview you will receive a notification that your recordings (one track per person) are being uploaded
- When the upload completes you should see your MP3 files listed. Click on the cloud symbol to download each track.

Saving and Naming the Files
- Zencastr generates monophonic 16 bit 44.1kHz MP3 files, creating one track per person. If you wish to hear both Interviewer and Interviewee(s) in one file you will need to create and export a multitrack session that combines the individual tracks.
  - Open the files in the audio editing software of your choice. Everyone's track will be exactly the same length so they should automatically sync up.
  - Export the multitrack session as a 16 bit 44.1kHz monophonic WAV. Name the file in accordance with your own or your institution's file naming protocols. This will be your preservation file.
  - Save an MP3 version of the combined file. This will be your use copy and the version you share with your Interviewee.
  - Rename the original files in line with file naming protocols and save it along with the others as the original source file

Sharing Recording with Interviewee

- Contact Interviewee and ask how they would like to receive their copy of the interview recording. VFC options generally include Dropbox, Google Drive or via mail on a USB thumb drive, SD card, or CD- or DVD-R.

Resources

<u>Remote Interviewing Online Resources:</u>

- American Folklife Center at the Library of Congress, 'Remote Fieldwork: Tech Considerations' https://blogs.loc.gov/folklife/2020/05/remote-fieldwork-tech-considerations/
- Association of Independents in Radio, 'Remote Recording Tips and Tricks' https://airmedia.org/tools/remote-recording-tips-and-tricks
- Baylor Institute for Oral History and Oral History Association webinar, 'Oral History at a Distance: Conducting Remote INterviews,' https://www.baylor.edu/oralhistory/index.php?id=969450
- J. Towne, 'Recording During The Coronavirus Pandemic', https://transom.org/2020/recording-during-the-coronavirus-pandemic/
- Center for Oral History Research at Columbia University, 'Resources for Covid-19 Interviewing', https://docs.google.com/document/d/1JhVCj1Vvc1hHsioMpna_0DITmY7Ad4Kv6ZrUojapVgI/edit
- LSU Libraries T. Harry Williams Center for Oral History, 'Remote Interviewing Considerations' https://www.lib.lsu.edu/sites/default/files/info/remote_interviewing_worksheet_0.pdf?fbclid=IwAR2zl6fv3pj0FBBNGTdmXx8UWDujgQSKTxGjQOag2s4MyYdKN3fe683gt7w
- NPR Training, 'Reporting From Home: How NPR Correspondents Do It' (Mar 18, 2020) https://training.npr.org/2020/03/18/reporting-from-home-how-npr-correspondents-do-it/
- Office for Human Research Protections, 'OHRP Issues Guidance for Application of the Human Subjects Protection Regulations to Actions Taken in Response to the COVID-19 Pandemic' https://www.hhs.gov/ohrp/ohrp-issued-ohrp-guidance-covid-19.html
- Oral History Association-Archives Interest Group collaborative document, 'Resources, examples, group experience to draw on to prepare Guidelines for Remote Oral History Interviewing', https://docs.google.com/document/d/1PSTjIzQuqcADjFs6QWm7VZaNNtIjVJwg1AsN1EsrIyU/edit#head   ing=h.our4i8ord71y
- Oral History Review, COVID-19 Oral History Resources, http://oralhistoryreview.org/covid-19-resources/
- Oral History Society 'Advice on remote oral history interviewing during the Covid-19 pandemic,' https://www.ohs.org.uk/advice/covid-19/

- University of California, Berkeley Oral History Center 'Remote Interviewing with Zoom webinar,' https://www.lib.berkeley.edu/libraries/bancroft-library/oral-history-center/remote-interviewing
- Society of American Archivists 'Documenting in Times of Crisis: A Resource Kit' https://www2.archivists.org/advocacy/documenting-in-times-of-crisis-a-resource-kit
- Vermont Folklife Center, 'Recording Interviews Remotely', https://www.vermontfolkli   fecenter.org/remote-recording

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- Ana Paulina Lee & Kimberly Springer (2020) Socially Engaged Oral History Pedagogy amid the COVID-19 Pandemic, The Oral History Review, DOI: 10.1080/00940798.2020.1793678
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- Anna F. Kaplan (2020) Cultivating Supports while Venturing into Interviewing during COVID-19, The Oral History Review, DOI: 10.1080/00940798.2020.1791724
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