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# Oral History at a Distance: Conducting Remote Interviews

**Facilitators:** Adrienne Cain, Steven Sielaff, Stephen Sloan, Ph.D.

**March 31, 2020**





Steven Sielaff

Stephen Sloan

Adrienne Cain



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# Going Remote



FORCES DRIVING THAT  
DECISION



LAYERS OF PROJECT  
DEVELOPMENT



WEIGH YOUR OPTIONS



THINK THROUGH ELEMENTS  
FOR BOTH YOUR RESEARCH  
DESIGN AND YOUR  
NARRATORS



CONSIDER YOUR  
OUTCOMES



MODIFY YOUR APPROACH



USE NEW TOOLS



STEWARD LEGAL AND  
ETHICAL CONSIDERATIONS





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# Oral History at a Distance: Conducting Remote Interviews

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# Legal and Ethical Considerations for Distance Interviews

(Along with a few tips, too)

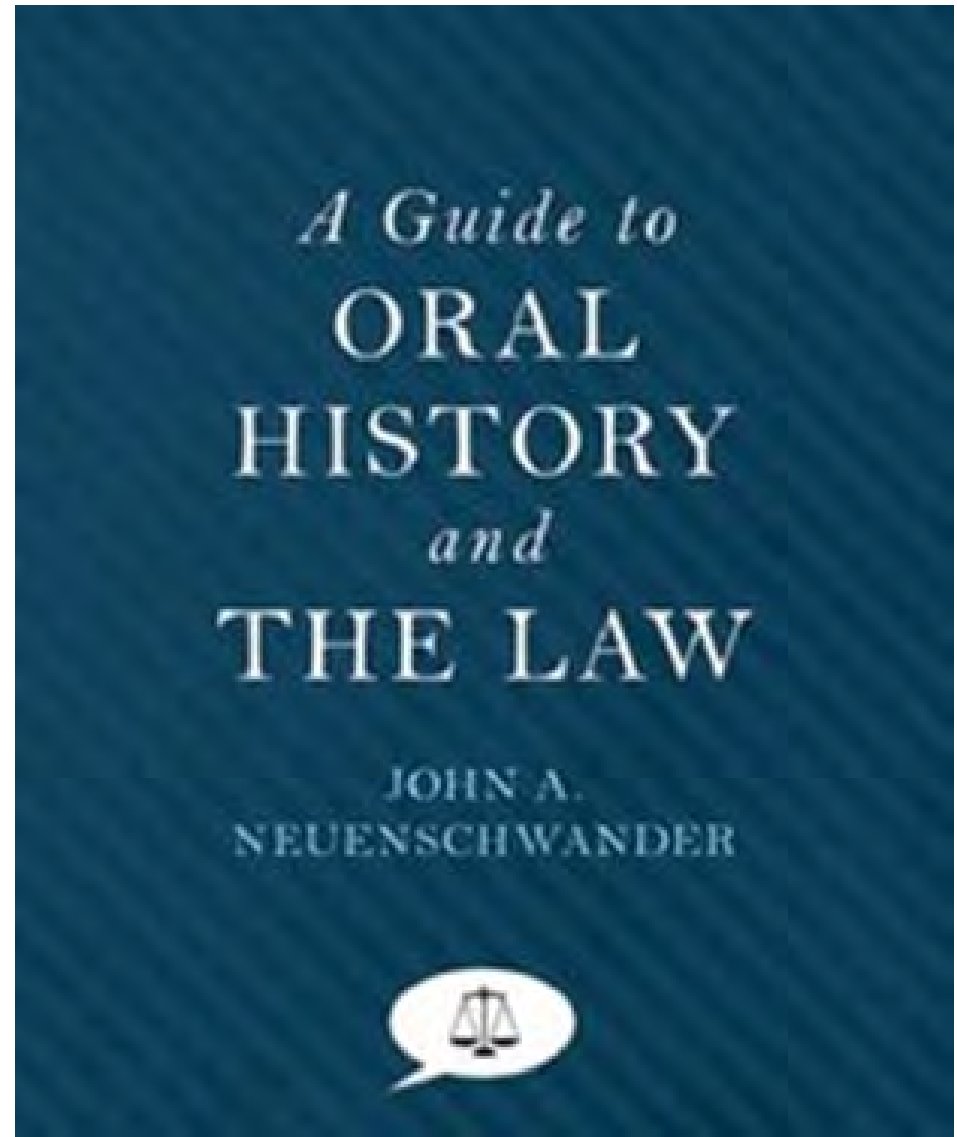


Adrienne Cain, MLS, CA  
Asst Director, Baylor University Institute for Oral History

*A Guide to Oral History  
and the Law*

John A.  
Neuenschwander

A full explanation of narrator rights, samples of legal-release forms, language for restricting use, suggestions for avoiding potential legal claims, how to handle possible defamation, and more.



# Principles and Best Practices

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[http://www.oralhistory.org/  
oha-principles-and-best-  
practices/](http://www.oralhistory.org/oha-principles-and-best-practices/)



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# IRB Review

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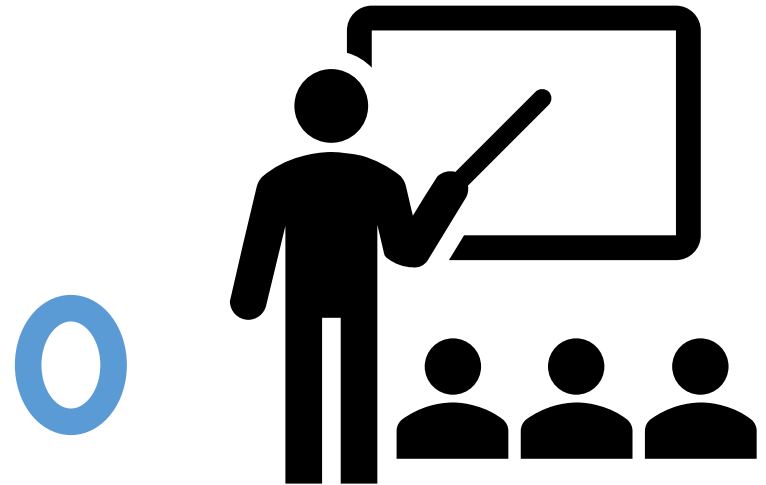


- Oral History Exempt from IRB Review
- “For purposes of this part, the following activities are deemed not to be research: (1) Scholarly and journalistic activities (e.g., **oral history**, journalism, biography, literary criticism, legal research, and historical scholarship), including the collection and use of information that focus directly on the specific individuals about whom the information is collected.”

# What is IRB?

IRB stands for Institutional Review Board, which is a committee that oversees any project involving human research to ensure that participant's rights are not violated.

This is generally for biomedical and behavioral research, but oral history was put in the loop since oral history research involves humans.



# Ethical Oral History



Keep in mind what the oral history means to the narrators.



Be sensitive to differences and do not reinforce thoughtless stereotypes.



Encourage narrators to speak naturally.



Engage with open-ended questions and well-timed follow-through, never arguing or being drawn into a debate.



Make only those promises you can and will fulfill. Fulfill every promise you make.

Long-range outlook

Correct representation

Informed consent

Oral History Ethics

# Long Range Outlook

1

Aim for the highest-quality interview possible.

2

Obtain as complete a record as possible.

3

Protect, preserve, and archive the interview.

Long-range outlook

Correct representation

Informed consent

Oral History Ethics



# Correct Representation

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- Encourage free and candid responses.
- Follow up responses for clarity and understanding.
- Allow narrators to review and correct transcripts or other outcomes requiring spellings of names and places and accurate meaning.
- Check the facts before quoting or paraphrasing interview materials.

Long-range outlook

Correct representation of meaning

Informed consent

Oral History Ethics

# Informed Consent

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## **Explain . . .**

- the purpose and procedures of the oral history project;
- planned and potential outcomes, including archiving and public programming;

# Your Project Design

- Title
- Topic/Purpose
- Methodology
- Scope: time, place
- Potential narrators
- Selected archives
- Planned outcomes
- Time frame for completing project



# Informed Consent

---



Explain . . .

- the purpose and procedures of the oral history project;
- planned and potential outcomes, including archives and public programming;
- **their mutual rights in the interview;**

# Rights



Ownership of recorded words as an “original work of authorship”



To ask and receive answers to questions about the project and procedures



To refuse to answer certain questions or discuss certain topics



To withdraw from the project at any time



To review and edit transcripts




To restrict use



# Tips for Distance Pre-Interviews



- Consider conducting your pre-interview (or a test run) in the same manner as the interview
  - Guide your interviewee through the platform/software
  - Use this time to gauge the sound and interview environment
  - If conducting video interviews, this is a great time to check out the interviewee's space
    - Ambient noise
    - Background items
    - Take an actual photo of the interviewee, avoid taking a snapshot of the interview (they rarely look nice—better yet, just request one)
- 

# Informed Consent

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Explain . . .

- the purpose and procedures of the oral history project;
- planned and potential outcomes, including archives and public programming;
- their mutual rights in the interview;
- **the purpose and necessity of the legal release form.**



# Legal Document

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- A. Donor agreement
- B. Copyright transfer
- C. Future use

# *A quick* note before we begin...

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## **Prefatory language**

The legal document will often begin with an introduction and explanation of the project. This is also helpful in providing informed consent to the participants in your project.

# A. Donor Agreement

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Shows the agreement made between you and the interviewee

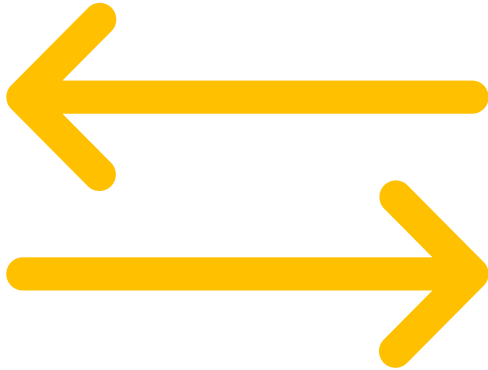


## **Deed of gift:**

“I, \_\_\_\_\_, hereby give (grant, assign, and/or transfer) this oral history interview to \_\_\_\_\_ as a donation . . .”

## B. Copyright Transfer

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A statement in which legal title and all literary property rights of the interviews, including copyright, is transferred



# Copyright

---

Reproduce

---

Prepare derivative works

---

Distribute copies to the public

---

Perform publicly

---

Display publicly

# A *quick* note on Copyright...

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Transfer of copyright ownership must be in writing.\*



Copyright ownership begins at the moment of creation.



Narrator and interviewer are joint authors of an interview.



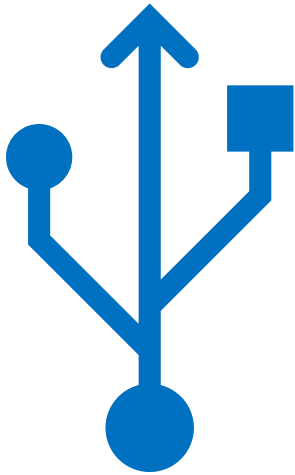
Copyright ownership transfers to heirs. Heirs may transfer the inherited copyright to an archives or oral history program.



Formal registration with the US Copyright Office is not required—but is required if the copyright holder files a lawsuit for alleged infringement.

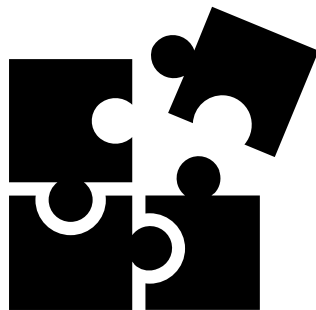
## C. Future use

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A future use statement covers all current and any potential use for the interview in the future. This includes changing media and sharing materials on new platforms. The statement should be broad, yet specific:

**“...in print, visual, electronic, or other available media, including the Internet.”**



# LEGAL DOCUMENT

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*Now let's put it all together!*

**“I hereby give this oral history interview to (institution/person) as a donation for such historical and scholarly purposes as they see fit, including but not limited to, the exclusive rights of reproduction, distribution, preparation of derivative works, public performance, and display in print, visual, electronic, or other available media, including the internet.”**

# Special Cases



OWNERSHIP OF RECORDED  
WORDS AS AN “ORIGINAL  
WORK OF AUTHORSHIP”



TO ASK AND RECEIVE  
ANSWERS TO QUESTIONS  
ABOUT THE PROJECT AND  
PROCEDURES



TO REFUSE TO ANSWER  
CERTAIN QUESTIONS OR  
DISCUSS CERTAIN TOPICS



TO WITHDRAW FROM THE  
PROJECT AT ANY TIME



TO REVIEW AND EDIT  
TRANSCRIPTS



TO RESTRICT USE

# Special Cases

Exclusive/Nonexclusive License

Restrictions on Use

Sealing Interviews

Administrative



# Safety Net Statement

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- **Cautionary Tale : Boston College Case**

Whenever you set a restriction, be sure to include a safety net statement. This statement acknowledges that you/your institution will uphold any restriction agreed upon, but cannot withhold the restriction against a subpoena:

**“(Institution/person) will take all reasonable legal steps to uphold the restriction(s) listed above; however, I acknowledge that (institution/person) may not be able to uphold my restriction(s) against a subpoena.**

# “How do I get a signed form?”

## Steps to secure a signed agreement form

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- During your pre-interview process, be sure to inform your interviewee that they will need to sign a release form
- Due to advances in technology, there are many ways to obtain a signed form:
  - Scanning
  - Adobe Acrobat
  - Fax
  - Snail Mail



# “What if my interviewee lives in another country?”

## International interviewees

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- No such thing as an international copyright
- Copyright protections are universally consistent
- **World Intellectual Property Organization**  
([www.wipo.int/copyright/en/](http://www.wipo.int/copyright/en/))
- Assess the risks of the topics being discussed in the interview
- **Importance of signed release form**

# “My participant wants to drop out!”

## Dealing with withdrawals

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- Participants have the right to withdraw from the project at any time
- **Importance of informed consent**
- Have a conversation on why the participant wants to leave
  - Is it something that can be rectified?



# “What the heck is a Zoom/Skype/Hangout, etc.?”

Helping participants work new technology

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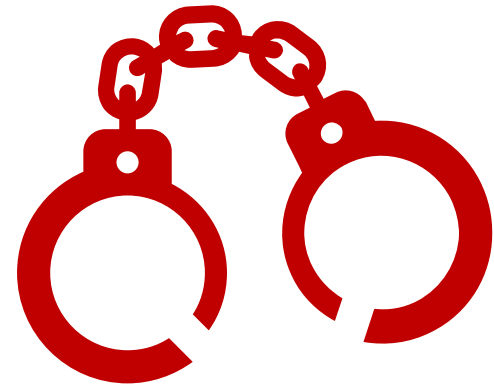
- Consider conducting your pre-interview in the same manner as the interview
- Walk your interviewee through the key components of the platform being used
- Patience is key!
- If the desired platform is too difficult, may want to consider a different option

“My interviewee may have just implicated someone of a crime...”

Dealing with potential defamation, slander, and criminal implications

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- Assess the risks of the topics to be discussed
- Allow the interviewee to review the interview
- Consider restricting or redacting portions of the interview
- Consult with legal counsel if serious concerns are presented



# Tips to keep in mind for distance interviews

- Pre interview process is crucial
- Get the form signed
- Familiarize yourself with copyright laws
- Make sure your participant is comfortable with the platform being used
- Conduct the pre interview in the same manner as the interview
- Test your equipment and the platform
- Make sure your interviewee looks good

# Use your resources

## OHA

- Use OHA's Principles and Best Practices as the ethical standard for your oral history work.

## *A Guide to Oral History*

- In U.S., obtain Neuenschwander's *A Guide to Oral History and the Law* and read the relevant sections on creating a release form and study the models in the appendix.
- World Intellectual Property Organization  
[www.wipo.int/copyright/en/](http://www.wipo.int/copyright/en/)

## Legal Counsel

- Special issues? Talk with a lawyer.





# Interviewing at a Distance

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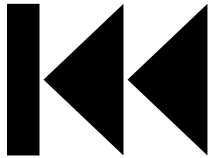


Stephen Sloan

Director, Baylor University Institute for Oral History

# Flashback to Getting Started

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- Interviewer/narrator relationship
- Letting the narrator shape the interview while retaining control
- Deep listening
- Interactive interviewing
- Asking the questions

# Running the Interview

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- Addressing your research topic
- Watching for markers
- Digging up detailed memories
- Practicing critical empathy
- Asking for elaborations/examples
- Using silence
- Traversing difficult topics

# Shifting Frameworks: Oral History at a Distance





# Interviewer at a Distance Framework

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- Cost (time and \$\$)
- Geographic distribution
- Pace of project
- Scheduling interviews
- Safety
- Distracting behavior
- Setting



# Narrator at a Distance Framework

---

- Cost (time and \$\$)
- Geographic distribution
- Pace of project
- Scheduling interviews
- Safety
- Distracting behavior
- Setting



# Logistics of Distance Framework

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- Technology
- Audio/Video
- Recording environment
- Navigating distance recording environment
- Wider reach



# Interviewer/Narrator Relationship



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- Anonymity/Confidentiality
- Privacy/Invasiveness
- Sensitive/controversial topics
- Empowerment
- “mutual sighting”





# Interviewer/Narrator Relationship



---

- Anonymity/Confidentiality
- Privacy/Invasiveness
- Sensitive/controversial topics
- Empowerment
- “mutual sighting”

Dynamics of increasing the social distance between oral historian and interviewee.

# Increased Social Distance

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- Trust
- Responses
- Less Relationship
- Different Data
- Less Depth of Responses

# Bibliography (thanks to)

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- Kelly Crager, PhD  
Head, Oral History Project  
Vietnam Center and Archive  
Texas Tech University
- Oltmann, Shannon M. “Qualitative Interviews: A Methodological Discussion of the Interviewer and Respondent Contexts,” *Forum: Qualitative Social Research*, 17(2), Art. 15, <http://nbn-resolving.de/urn:nbn:de:0114-fqs1602156>.
- Vogl, Susanne. “Telephone Versus Face-to-Face Interviews: Mode Effect on Semistructured Interviews with Children.” *Sociological Methodology* 43, no. 1 (August 2013): 133–77.



# Recording Remote Interviews

Steven Sielaff

Senior Editor & Collection Manager

Baylor University Institute for Oral History




# Presentation Companion

[www.baylor.edu/toha/technology](http://www.baylor.edu/toha/technology)

Baylor > TOHA > Resources > Oral History Technology

## Oral History Technology



This page is a companion piece to an article entitled "Brave New World: A Guide to Twenty-First Century Technology for Oral History," to be published in the 2017 edition of the *Sound Historian*. The links listed below, organized by section, mostly correspond to the ***bold, italic text*** found in the article. Additional or alternative links will be provided over time as technology progresses. The hope is that this page will continue to be updated twice yearly so that recent trends can be fully represented. In general, please consider also consulting the wonderful resource website [Oral History in the Digital Age \(OHDA\)](#) for additional information and discussions on many of these topics.



# Oral History Recording Best Practices

# Recording Guiding Principles

- Record for long-term access and preservation
- Use the best equipment possible
- Anticipate obsolescence of both equipment and media
- LOCKSS: Lots of copies keeps stuff safe

# Recording Formats/Access

- Preservation Quality targets:
  - Audio: WAV (16/44.1 “CD Quality” or better)
  - Video: AVCHD, AVI, MOV, MP4
- Many remote recording apps only support mp3
- Remember that video can be converted to audio if your participant does not have a camera or if you only wanted audio in the first place
- Keep in mind space requirements:
  - Budget 1GB per audio hour
  - Video hours run from 10-30GB based on settings



# Entry Professional Audio Recorders

- Marantz PMD-661mkIII (\$350)
  - Packaged with free external mic!
- Tascam DR-100mkIII (\$300)
- Zoom H5 (\$280)
- Zoom H4N PRO (\$220)
- Tascam DR-40X (\$180) NEW!



\*\*If no other option is available, you can always record a speakerphone conversation. However, many remote interviewing tools still require you to connect the device to an audio recorder\*\*


# Digital Storage

- Your storage location for remote interviews will likely be different than your typical workflow
- Remember LOCKSS – Lots Of Copies Keeps Stuff Safe – and spread out the locations!
- Some backup options:
  - SD Cards
  - Portable Hard Drive
  - Cloud Storage
  - Optical Disks



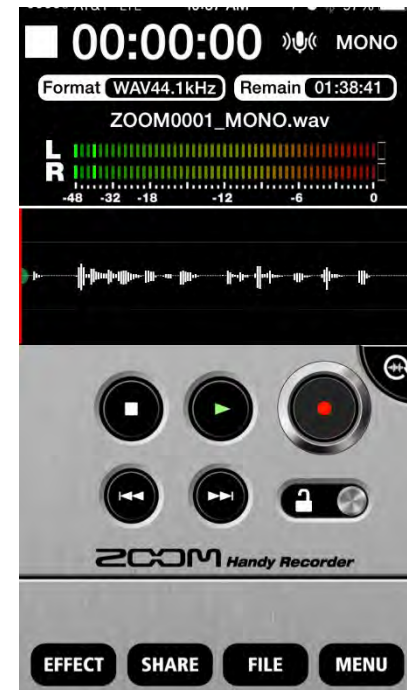
# Remote Recording Basic Equipment

# Remote Equipment Considerations

- It is difficult to make a remote interview not sound/look like a remote interview 
- Most of the equipment we currently have on hand that enables remote interviews is very basic (most smartphones have eclipsed basic laptop cameras)
- Your experience/investment in equipment will not always equal your interviewee's
- Internet speeds/bandwidth can affect quality too

# Using a Smartphone for Audio

- Consider purchasing a microphone attachment (\$100-200)
- Which app will you use?
- Does it record in WAV?
- Does it crash?
- Do you have enough storage?
- How will you share the files?
- Airplane Mode!



# USB Microphones

- Blue Snowball (not iCE)
  - ~\$70 in a number of flavors!
- Blue Yeti
  - ~\$100 for smaller “Nano”
  - ~\$125 for USB
  - ~\$250 for “Pro” – USB + XLR

You may want to also consider a pop filter (\$10) or desktop/arm stand (\$25)



# USB Webcams

- “Basic”                      Logitech HD Webcam C615                      \$30
- “Advanced”                      Logitech C920S HD Pro Webcam                      \$70
- “Pre-Lit”                      Razer Kiyo Streaming Webcam                      \$100



\*\*Webcams are almost impossible to find right now, with prices through the roof (hundreds of dollars)\*\*

# USB Headset

- Headphones suggested for video calls to eliminate echo and recording overlap
- Basic headset microphone > on-board
- Start at around \$30
- A bit hard to find right now too
- Might want to consider gaming varieties







# Remote Audio Interviews

# Landline Options

- Easiest = JK Audio Quicktap (~\$50)
- Audio Mixers can provide quality (\$200+)
- Many models require a recorder in addition
- Will still sound like a phone interview without major \$\$ investment



# Cellphone Options

- Many apps to choose from, but most only record in mp3 (Rev)
- Google Voice: for both iOS and Android, create an account/number, easily share, but mp3 only...
- iOS WAV options:
- Android WAV options: Call Recorder – ACR (free), RMC: Android Call Recorder (free)

# Cellphone Options

Physical option #1

Physical option #2

JK Audio CellTap 4C Wireless Phone Audio Tap Adapter (\$99)

Olympus TP-8 Telephone Pick-up Microphone (\$20)

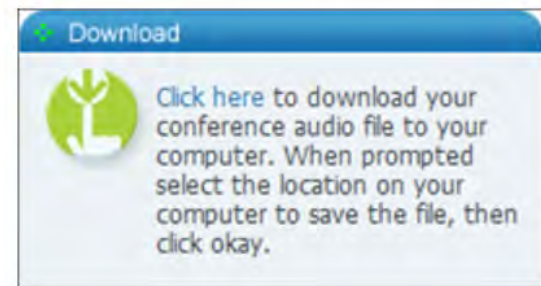


# FreeConferenceCall.com

- “Pay what you can” price model
- Tools for both standard phone calls and video conferences
- Audio calls available in WAV, video in MP4

Download to your computer

Follow the link that is provided in your we recommend that you always download the file to your favorite location. The file





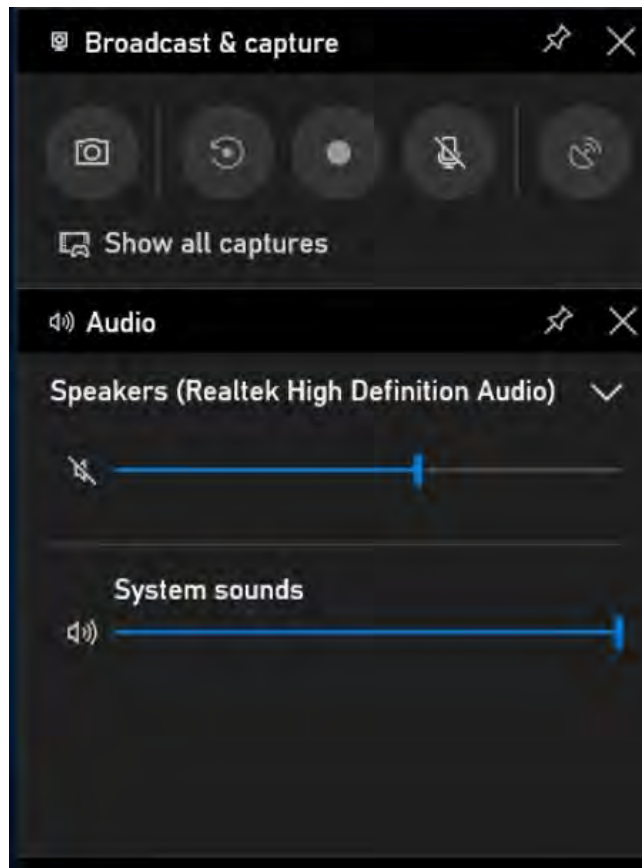
# Remote Video Interviews

# Remote Video Recording Tips

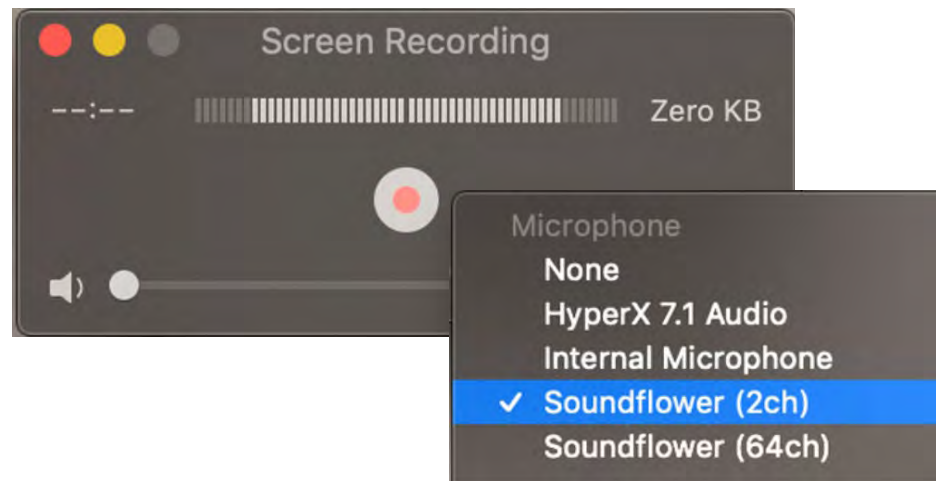
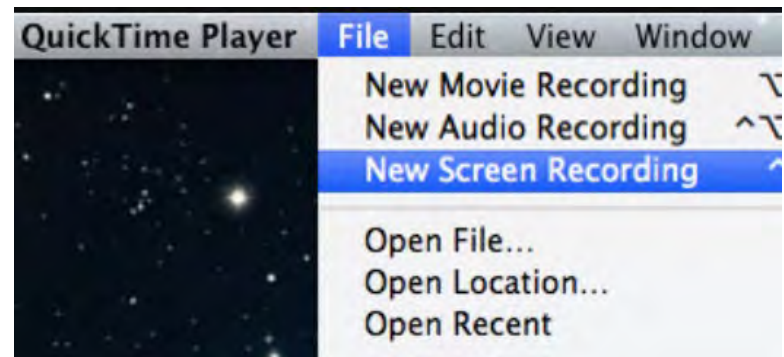
- Screen capture or in-app?
- Light Source -> Computer -> Participant
- Stay away from variable/backlit sources
- Keep internet bandwidth open
- Test with friends/Confirm with participants first!

# Screen Capture Apps

## PC: Xbox Game Bar



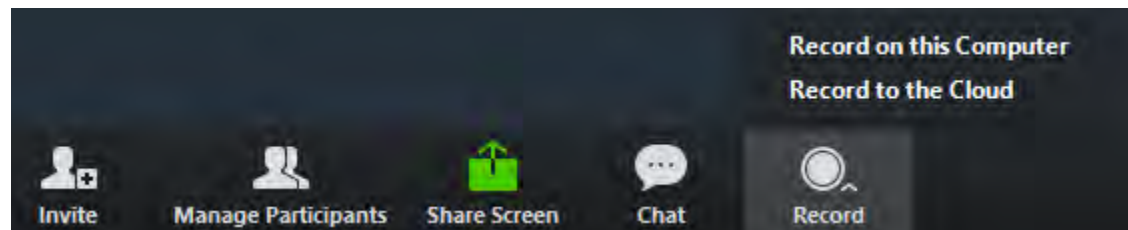
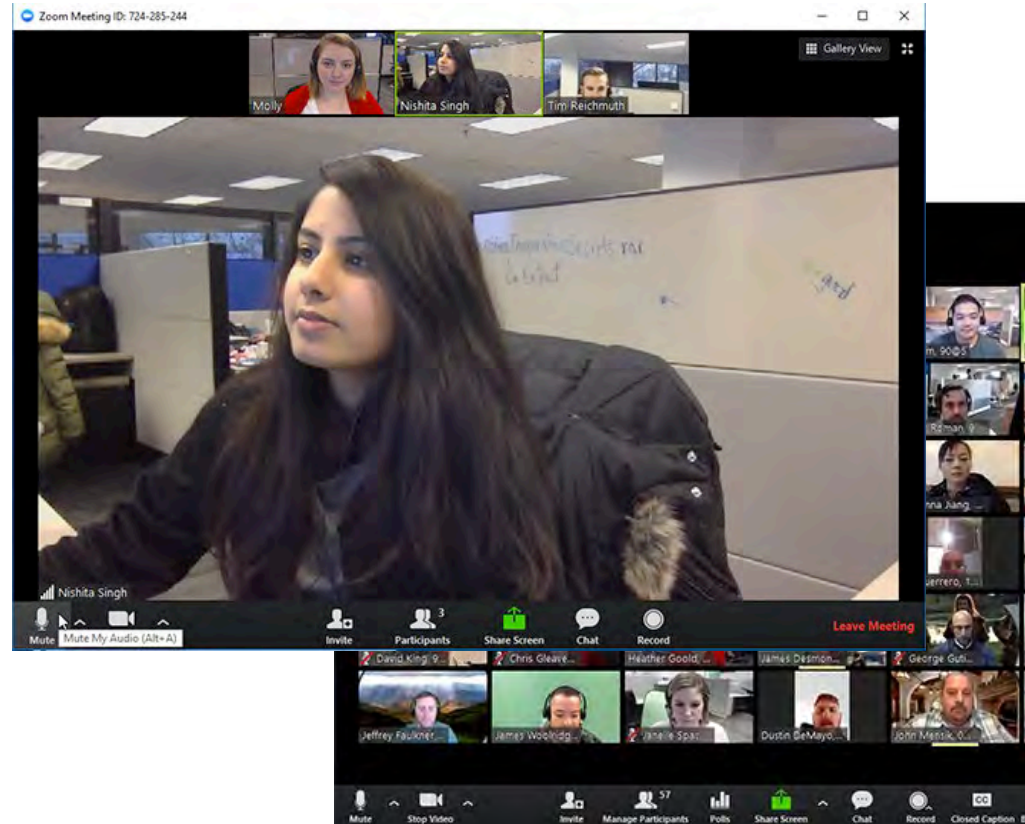
## Mac: Quicktime





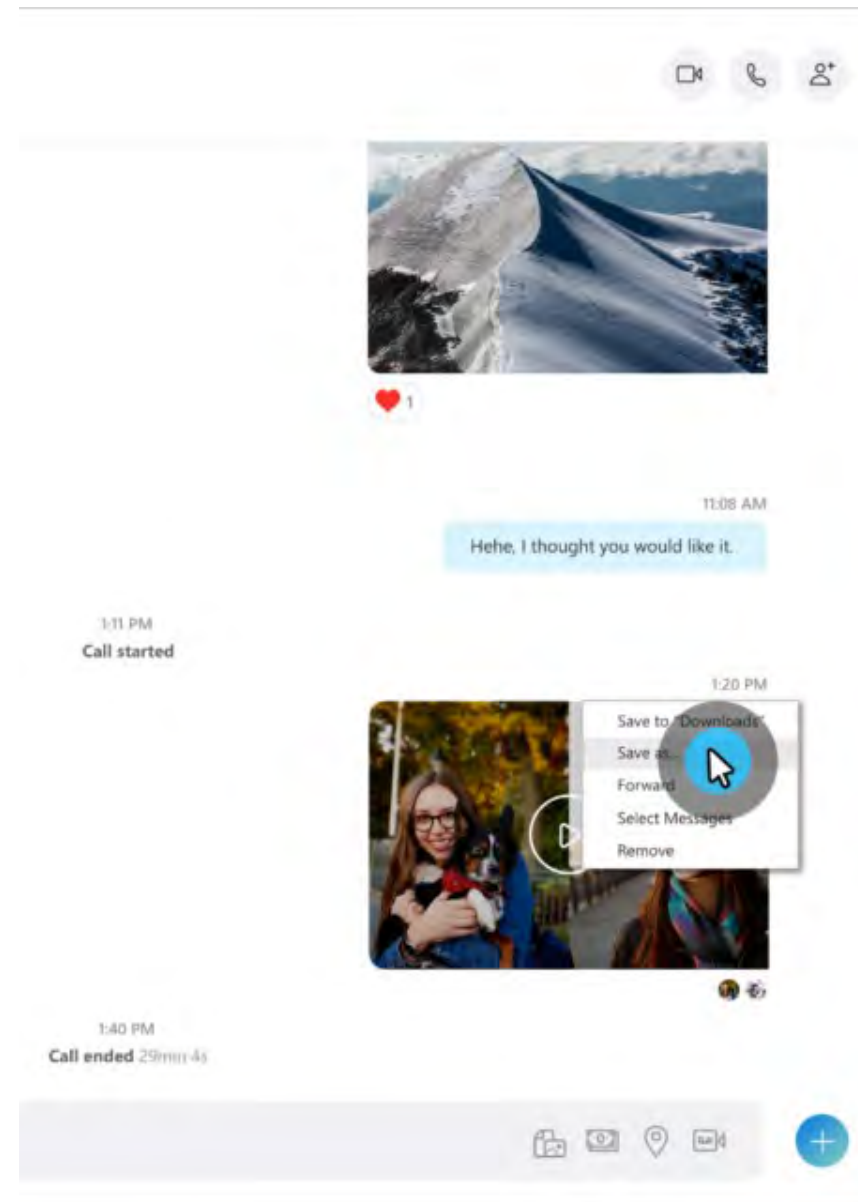
# Zoom

- Two options: Local & Cloud (only for paid accounts)
- 40-minute limitation on free accounts
- Variety of layouts based on the recorder's choice (mobile can add black bars)
- Multiple participants can record at the same time



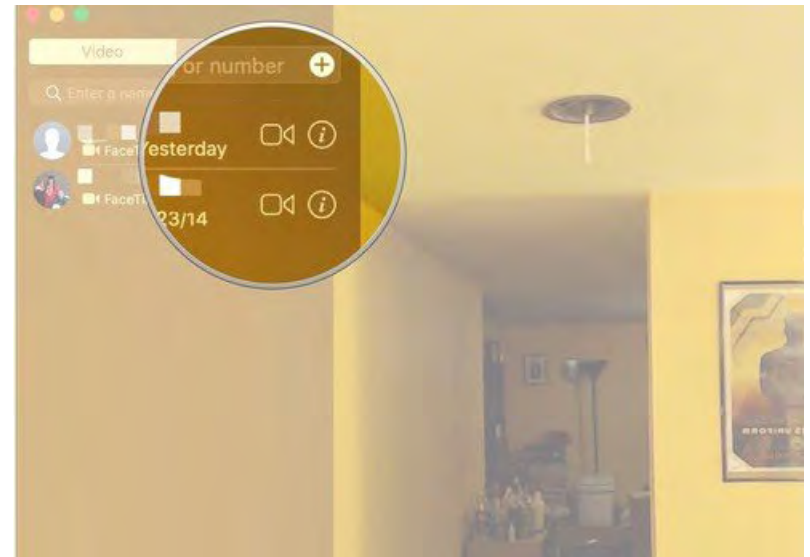
# Skype

- Only available for Skype-to-Skype calls
- Quality of recording = quality of equipment on both ends
- MP4 file saved to the cloud
- Remember to download after the call is over (file link will be in your chat window)
- Can record from both Desktop and Mobile, Mac or PC



# Facetime

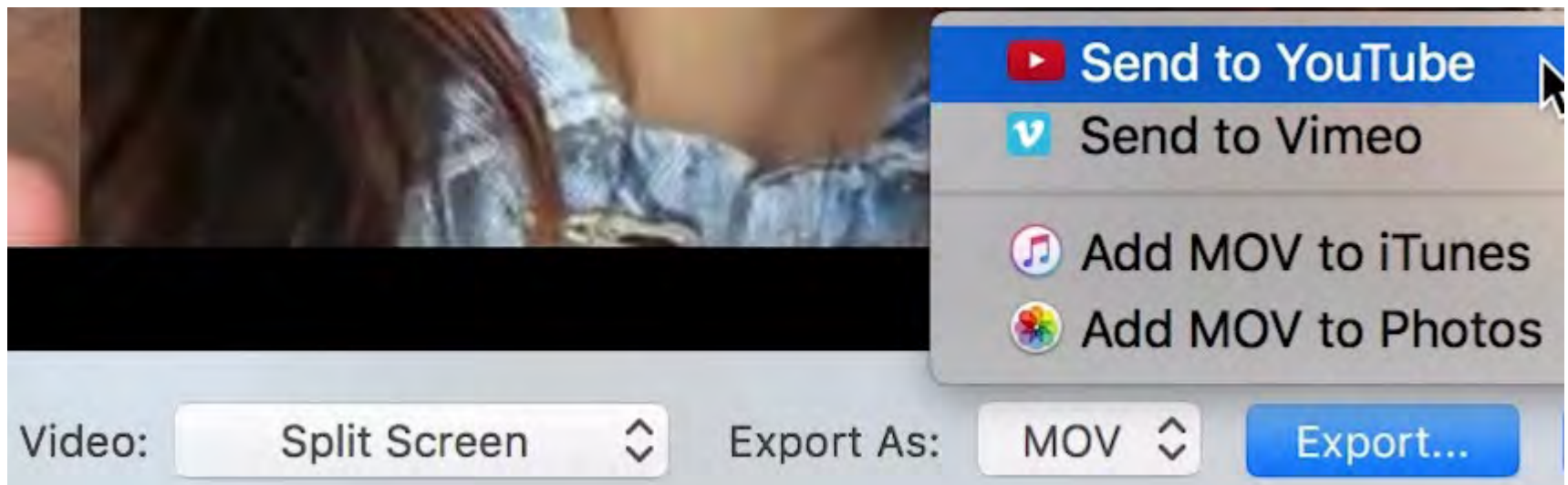
- Records only on Mac
- Utilizes Quicktime screen recording (useful for other apps too!)
- Capture the app window on screen, save afterwards (.mov)
- Interviewee can use a phone or tablet



# Ecammm

- Free trial, or one-time \$40 charge
- Third-party solution for recording both Skype and Facetime calls on a Mac
- Ability to choose specific audio/video input sources and record in files both separate and together
- Great way to create both oral history preservation master and extra production files

# Ecammm



[Click Here!](#)



Helpful Resources



# OHA Principles and Best Practices



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## OHA Principles and Best Practices

**Principles for Oral History and Best Practices for Oral History**

Adopted October, 2018

- [Introduction](#)
- [Core Principles of the OHA](#)
- [OHA Statement on Ethics](#)
- [Best Practices](#)
- [For Participants in Oral History Interviews](#)
- [Archiving Oral History \(Adopted October 2019\)](#)

# Recent Remote Interview Resources

- OHA AIG Collaborative Resource Document:
  - <https://docs.google.com/document/d/1PSTjlzQuqcADjFs6QWm7VZaNNtljVJwg1AsN1EsrlYU/edit>
- H-OralHist Discussion Thread
  - <https://networks.h-net.org/node/16738/discussions/6031284/conducting-oral-history-interviews-remotely>



# And don't forget these great online resources for tech!



TOHA's Tech  
Webpage!



[www.baylor.edu/toha/technology](http://www.baylor.edu/toha/technology)



Oral History in the  
Digital Age!



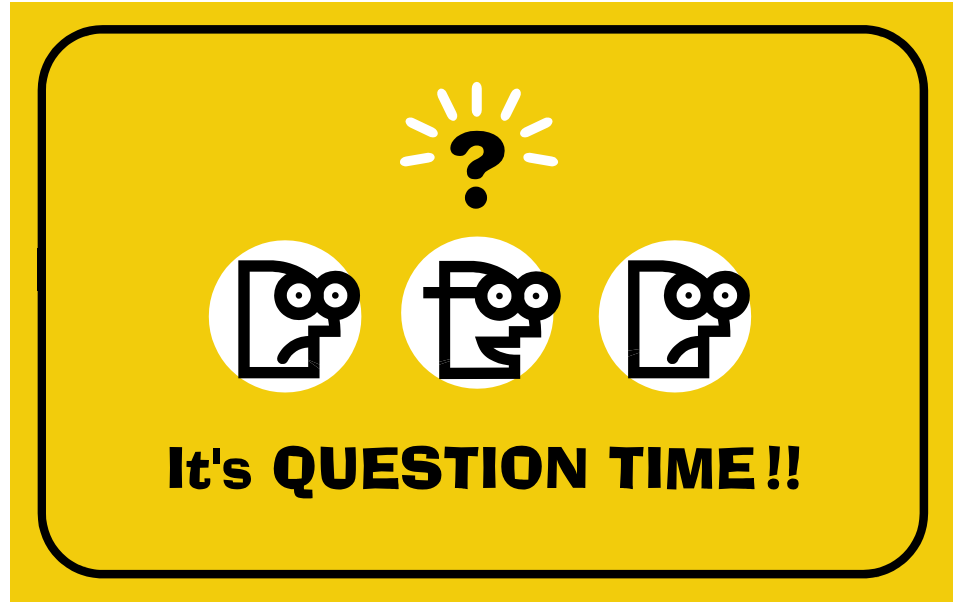
[ohda.matrix.msu.edu](http://ohda.matrix.msu.edu)

Time for your questions!



# Q & A

Thinking about your projects





Thank You  
For Participating!

