



PRACTICING ORAL HISTORY

ORAL HISTORY AT A DISTANCE

STEVEN SIELAFF, STEPHEN M. SLOAN,
ADRIENNE A. CAIN DAROUGH,
AND MICHELLE HOLLAND

ROUTLEDGE

ORAL HISTORY AT A DISTANCE

Oral History at a Distance is the first publication to explore both the ideas behind and application of oral history in remote projects.

Since the COVID-19 pandemic, working from a distance is now an ongoing and necessary approach in the oral historian's tool kit. In this volume, the experienced team members of Baylor University's Institute for Oral History provide a road map for adapting traditional best practices and procedures to this new environment while maintaining the standards oral historians hold dear. The authors present chapters on the range of oral history practice—project design, ethical considerations, project management, interviewing, technology, and preservation. While this book is always concerned with how to do remote oral history well, it also examines the changed dynamics and new considerations of moving from face-to-face projects to distance work. In this, the authors are joined by an international host of practitioners who have had their own experiences with oral history at a distance and share their insights from their work through informative case studies.

As the practice of oral history moves into a new era, this book is an essential resource for oral historians—whether they are just starting out or wanting to stay innovative in their endeavors.

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*Steven Sielaff, Stephen M. Sloan,
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*To the millions of lives and stories lost to the
COVID-19 pandemic.*

*To the hundreds who attended the “Oral History at
a Distance: Conducting Remote Interviews” webinar
and demonstrated the need for this book.*

*And to all the oral historians who continue to work
and innovate in order to preserve and make known
the varied human experience.*



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CONTENTS

<i>Acknowledgments</i>	<i>xiii</i>
<i>Foreword</i>	<i>xv</i>
<i>Nancy MacKay</i>	
<i>Preface</i>	<i>xviii</i>
<i>Stephen M. Sloan</i>	
SECTION I	
Chapters	1
1 Introduction	3
<i>Stephen M. Sloan</i>	
2 Project Design	19
<i>Adrienne A. Cain Darough</i>	
3 Ethical Considerations for Remote Projects	40
<i>Adrienne A. Cain Darough</i>	
4 Managing Remote Projects	60
<i>Michelle Holland</i>	
5 Interviewing at a Distance	83
<i>Stephen M. Sloan</i>	

x Contents

6	Remote Recording Technology <i>Steven Sielaff</i>	106
7	Preserving Remote Recordings <i>Steven Sielaff</i>	130
8	Looking Ahead: Final Thoughts on Going Remote <i>Steven Sielaff</i>	144
9	Afterword <i>Steven Sielaff</i>	154
SECTION II		
Case Studies		157
10	Interviewing Remotely: The Vietnam Center and Archive Oral History Project as a Case Study <i>Kelly E. Crager</i>	159
11	The Utica Roots Oral History Project <i>Dan Fuller and Jean Greene</i>	162
12	Bridging Distance in Project-Based Research: The Cases of “Montreal Life Stories” and “Deindustrialization and the Politics of Our Time” <i>Steven High</i>	165
13	Moving Past “Analog” Remote Recording: Total Recorder, TheirStory, and the UW–Madison (Wisconsin) Oral History Program <i>Troy Reeves</i>	169
14	A Community Connecting during a Pandemic: Case Study for <i>Oral History at a Distance</i> <i>Alisha Babbstein</i>	172

15	Pivoting in Crisis: The Arthur Ashe Oral History Project at UCLA <i>Yolanda Hester and Chinyere Nwonye</i>	176
16	Oral History at a Distance: A View from Australia <i>Judy Hughes</i>	180
17	National Life Stories <i>Charlie Morgan</i>	185
18	TheirStory: How a Visit to the Anne Frank House Resulted in the Creation of an Oral History Platform <i>Zack Ellis</i>	188
SECTION III		
	“Oral History at a Distance” Webinar Survey	191
SECTION IV		
	Appendix	197
19	Sample Project Design	199
20	Sample Memorandum of Understanding	201
21	BUIOH Cost Schedule for Oral History Interviewing and Processing	203
22	BUIOH Interviewer Deed-of-Gift Agreement	206
23	BUIOH Interviewee Deed-of-Gift Agreement	208
24	BUIOH Restricted Interviewee Deed-of-Gift Agreement	210
25	Sample BUIOH Interview Abstract	212
26	Sample BUIOH Interview Audio Log	214
27	BUIOH Transcription Assistant Contract	216

xii Contents

28	BUIOH Equipment Loan Agreement	218
29	BUIOH Email Template for Transcript Review Request	219
	<i>Index</i>	221

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We would like to thank the authors of the nine case studies included in this book for agreeing to participate in this project and for being wonderful collaborators to work with. The examples and insights provided by their shared experiences truly enhanced not only the end product but also our own perspectives toward this new remote paradigm.

We also would like to acknowledge the sixty-eight individuals who attended our “Oral History at a Distance: Conducting Remote Interviews” webinar and who took the time to fill out our survey, nearly two years after the instruction was initially offered. It was fascinating to comb through the data points and read the comments of dozens of oral historians detailing how this new era of remote interviewing had affected their practice, and it certainly impacted our views on how lasting this current phenomenon is likely to be.

To our BUIOH office managers, Dianne Schmidt and Caleb Lindgren, we would like to offer our sincere gratitude for managing the litany of administrative tasks required to turn this book into a reality. In addition, we thank Dianne for overseeing our “Oral History at a Distance” webinar which drew over five hundred attendees from across the globe and thank Caleb for utilizing his editorial skills to aid us in coalescing four disparate voices into one common narrative.

Our students at BUIOH constantly amaze us with their diverse skill sets and work ethic, and we are very grateful for the various tasks they undertook to make this book a reality. Specifically, we would like to acknowledge Allison Brown for serving as lead researcher of the project and Amy Achenbach for formatting the survey report.

We are also forever indebted to our manuscript illustrator (and BUIOH alumna) Priscilla M. Martínez who brought style to the substance of our work. Priscilla was very gracious with her time as she absorbed our feedback and endeavored to create on paper the collective vision we had for each and every piece of art for this publication.

Finally, we would also like to thank the generous support of the University Libraries and the College of Arts & Sciences at Baylor University. Their significant financial support enabled our publication to be provided as an open-access e-book, and we are very excited to see the ways in which this expands its use.

FOREWORD

Nancy MacKay

I time travel backwards to March 2020, when news of a strange and dangerous virus emerges and the orderly life I take for granted disappears. I think about my oral history colleagues scattered around the world and wonder how they are doing. Some are in the middle of projects, even traveling to an interview when the lockdown strikes; others have interviews scheduled with elders or at-risk narrators and must decide whether to continue or postpone.

Though we oral historians are a diverse group, one value we all share is a high regard for the in-person oral history interview. As would be expected of such a group, we rose to meet the occasion, not only by continuing our ongoing work but also by seeing the COVID-19 pandemic as an opportunity to capture history in the making, in real time. Sometimes we conducted interviews face-to-face as planned; sometimes we postponed them; and sometimes we set up remote interviews, by phone or internet. Often, we had to improvise at the last minute. We did our very best during these early pandemic days. Only one thing was missing: a road map for best practices to guide us through this new reality.

It didn't take long for the Baylor University Institute for Oral History (BUIOH) to pick up the ball. BUIOH, widely known for its oral history training programs, offered a webinar, "Oral History at a Distance: Conducting Remote Interviews," on March 31, 2020, only twelve days after the lockdown began in my home state of California. As the BUIOH team members were, themselves, figuring out how to practice oral history in a lockdown situation, they put together a program that attracted more than five hundred participants from around the world, including myself. The upbeat message was the following: "Of course we will continue our work. It is more

important than ever. It's just a matter of reframing the details of how we practice." This webinar covered not only the obvious adjustments for interviewing but also project design, recordkeeping, technology, and ethical and interpersonal considerations in this new environment. It ended on a high note, with BUIOH Director Stephen M. Sloan challenging oral historians to rethink their insistence on in-person interviews, a radical idea for oral historians in pre-pandemic days.

In addition to all we learned from the BUIOH folks, something magical happened at the webinar. We reconnected with our own community, the five hundred of us gathered in a single spot in cyberspace. We saw each other's faces on the screen and smiled. We communicated in the chat box. The webinar brought our community together when we most needed it. The idea for this book was born that day.

Authors Steven Sielaff, Stephen M. Sloan, Adrienne A. Cain Darough, and Michelle Holland form the staff of BUIOH, and each took the lead as author in chapters reflecting their own areas of expertise, yet everyone read and commented on each other's chapters. We went back and forth about whether to present the book as a multiauthor book written in a single voice or whether chapters should be individually authored. In the end, we decided to leave it simply as is: a group project with each chapter written by a single author. We see this approach as a strength, as it gives the authors freedom to write in their own words, and I hope you will enjoy catching glimpses of each author's personality.

The main section of the book is followed by nine thoughtful case studies that reflect the work of oral historians on the ground responding to the COVID-19 pandemic. Included are the stories of university oral history programs, an independent oral historian, a national library, a nonprofit organization, and the founder of a technology firm that supports oral history. Each essay is great reading and should inspire you to be flexible and creative in your own work and, above all, carry on practicing oral history.

One of the challenges of writing this book is that the subject matter kept changing. When the book was planned in 2021, we all assumed the exceptional circumstances caused by the pandemic would end with a bang and we would soon resume our pre-pandemic practice. That was not the case, and the writing required an ongoing process of rethinking and responding. The final version is written with a hybrid environment in mind, including an expanded range of decisions in project design, interviewing, technology, project management, and, especially, additional ethical considerations concerning the health and safety of both narrators and interviewers.

A road map for best practices for oral historians? You bet! The road ahead may be bumpy and curvy, it may take us in directions we never planned to

go, and we may not know what we will find at the end, but *Oral History at a Distance* will get you started off—safely and ethically—down that road.

I'm very proud to introduce *Oral History at a Distance* as the fourteenth title in the *Practicing Oral History* series.

Nancy MacKay, series editor
Berkeley, California
August 2023

PREFACE

Stephen M. Sloan

Oral History and the COVID-19 Pandemic

Working at a university, the rhythms of academic life in large part dictate the way the passage of time is experienced. For many employed at or attending colleges in the United States, it was spring break 2020 when the COVID-19 pandemic began to really hit close to home. On March 11 the World Health Organization declared a pandemic, on March 13 the crisis was declared a national emergency, and on March 15 states began to shut down. At our institution, Baylor University, spring break was initially extended for one week before the decision was made to restrict students from coming back to campus and for all teaching and work, if possible, to shift to remote. Although the specter of COVID-19 had been growing since January and February of that year, the shutdown shift came quickly. It was a moment that would bring profound and enduring changes, some of which would only begin to become evident years after that initial emergence.

Here at the Baylor University Institute for Oral History (BUIOH), we have been conducting, processing, archiving, teaching, and publishing oral history since 1970.¹ As a program, our work has been touched by and has reflected the evolution of oral history as a practice over the last fifty-plus years. In that moment, in March 2020, oral historians around the globe began to raise questions about the best ways to meet the new challenges that the shutdown presented, chiefly the transition from traditional face-to-face oral history projects to remote practice. This was a conversation that sparked virtual discussions on H-OralHist,² chain emails from international groups, and inquiries to the Oral History Association in the United States. At BUIOH, our team, which has offered online oral history training since 2009, quickly

organized a webinar cosponsored by the Oral History Association to address the topic. The “Oral History at a Distance: Conducting Remote Interviews” webinar was held on March 31, 2020, and dealt with ethical/legal implications, interviewing dynamics, and recording strategies and methods. Despite a brief window to promote the workshop, the event was well attended, with more than five hundred participants signing on for the training session. There was widespread engagement from practitioners throughout the United States, but dozens of international attendees as well.³ This interest was reflective of a boom in story-gathering efforts that quickly erupted in the early stages of the COVID-19 pandemic. Researchers wanted to continue their existing oral history efforts but also start new projects on the varied impacts of the pandemic.⁴

Reflecting back on that period now, the spike in immediate interest in remote oral history represented a major shift in oral history practice. In a follow-up survey of “Oral History at a Distance” webinar participants, launched some two years after the initial training, 87 percent of respondents reported they had conducted remote interviews since the arrival of the pandemic.⁵ In this same survey, 68 percent of participants indicated that, despite in-person interviews becoming viable again, they would continue to incorporate distance recording in their oral history work.⁶ It seems clear that the COVID-19 crisis was a watershed event for oral historians regarding distance interview work. The growing understanding of how to do distance work well has been informed by several additional workshops offered by oral historians around the globe, and broad international networks emerged to support researchers doing projects in a variety of settings. It was a quick start in what has become a long study considering the best practices and approaches for working remotely. This current volume evolved from the BUIOH team members training, recording, processing, and reflecting on the meaning and methods of oral history from a distance.

Notes

- 1 Baylor University has had several connections to the oral history movement in the United States and beyond. For more information on the work of the Institute for Oral History, see <https://library.web.baylor.edu/oralhistory>. For a list of publications and resources on oral history published by our team since the founding of our program, see <https://library.web.baylor.edu/visit/institute-oral-history/research/buioh-scholarship>.
- 2 H-OralHist is a network for scholars and professionals active in studies related to oral history. It is US based and affiliated with the Oral History Association. Subscribe or learn more at <https://networks.h-net.org/h-oralhist>.
- 3 This included international participants from Hungary, Bulgaria, Canada, France, Germany, Greece, Ireland, Kosovo, New Zealand, Scotland, Sweden, and the United Kingdom. The video of this training is available with additional oral history resources from BUIOH at <https://library.web.baylor.edu/oralhistory>.

- 4 For more analysis on this moment and oral history, see Stephen M. Sloan, “Behind the ‘Curve’: COVID-19, Infodemic, and Oral History,” *Oral History Review* 47, no. 2 (September 2020): 193–202. This article is part of a special edition of *The Oral History Review* that was assembled in late spring and summer 2020 by editors David Caruso, Abigail Perkiss, and Janneken Smucker. This edition offers a revealing snapshot of the concerns of oral historians during the initial phase of the pandemic.
- 5 Baylor University Institute for Oral History, “Oral History at a Distance” Webinar Survey, Spring 2022. The quantitative findings from the survey are included in the appendix, while the full survey results are available on this publication’s companion website, <https://library.web.baylor.edu/oralhistoryatadistance>.
- 6 BUIOH, “Oral History at a Distance” Webinar Survey.

SECTION I

Chapters



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INTRODUCTION

Stephen M. Sloan

Rapid-Response Oral History

Much of the strong impulse to “go remote” with oral history practice was tied to a desire to organize rapid-response projects to document the ways in which the COVID-19 pandemic was impacting communities around the globe. Oral history in the midst or immediate aftermath of crisis is a phenomenon that has become an increasingly common application of the methodology since the turn of the twenty-first century.¹ Oral historians were drawn to study the impact of a pandemic on the global citizenry from a host of angles, a disruption of life that an epidemiological event had not caused on such a scale in over one hundred years. New projects emerged at a frenzied pace to gather oral histories around the globe. In the second section of this volume, you will find several examples of such work: accounts from our colleagues around the world about how they approached doing oral history remotely and the decisions they had to make.

A Longer Story

While the shutdowns ushered in by the COVID-19 pandemic forced practitioners to more fully embrace distance work, this sudden surge in distance oral history recording belies a subtler change in oral history practice that had been taking place for some time. Researchers have increasingly been employing distance recording for decades. Although a minority of interviewers had worked remotely before 2020, the evolution of distance interviewing has its own history.

The vanguard of remote interviewing consisted of taped telephone-based exchanges that emerged in the 1970s and 1980s. Not used extensively by oral historians at the time, telephone interviews were common in the efforts of pollsters and surveyors by the 1970s and emerged as the dominant form of research in those industries by the end of the 1980s.² A host of publications in those and kindred fields dealt with the rationale for such work and compared the data harvested in telephone versus face-to-face interviews. Some of those insights from this early age of qualitative interviewing are useful in thinking about the shifts in the current epoch.

Telephone-Based Interviewing

Research on remote surveying in this early period primarily focused on the interviewer, debating the merits of the approach and assessing the qualities of data obtained for researchers through these interviews. Often in these early discussions, the dramatic cost savings and the rapid results of telephone surveying were put forward as the prevailing benefits. In his piece synthesizing the dynamics of telephone versus face-to-face interviewing, linguist Roger Shuy noted several additional advantages of telephone interviews. These included reduced interviewer effects on the exchange, better uniformity in delivery and standardization of questions, and improved interviewer safety.³ James Frey also noted that a benefit of the telephone exchanges was that they encouraged more active participation by the respondent. As he stated, “Whatever the question, respondents will provide an answer, even if it is a rather undefinable ‘grunt.’ . . . Silence is a rare occurrence in most phone conversations.”⁴ Likewise, when comparing telephone versus face-to-face interviews, sociologist Robert M. Groves documented a faster speed of questioning in telephone interviews than in face-to-face. He did note, however, that this quicker pace was often associated with briefer, less in-depth responses to open-ended questions than those given in in-person interviews.⁵

The quicker pace of telephone interviews came from the fact that the medium works quite well for close-ended questions, but face-to-face exchanges encourage broader or more improvised answers to questions. As Shuy notes, “The virtue of the in-person interview . . . is that it has the context potential of simulating natural everyday conversation; a respondent may provide more than brief, underdeveloped answers to an interviewer’s questions.”⁶ As an extension of this, researchers found that face-to-face interviewing was more effective for addressing complex topics than conversations on similar topics via a telephone exchange.

In debating the qualities of telephone-based interviews, other researchers noted some additional interpersonal hurdles telephone-based interviews presented. As early as 1979, researchers observed the real obstacles telephone interviewing presented to relationship building between the interviewer and

respondent. In measuring participant responses to telephone and face-to-face surveys, there were several indicators of less interviewer-narrator rapport at a distance. These markers included the rushed answers noted earlier as well as greater initial suspicion, a belief that the process was taking too long, less interest throughout the interview, and an uneasiness discussing certain topics.⁷ Conversely, as Shuy noted, face-to-face exchanges possess “more small talk, politeness routines, joking, nonverbal communication, and asides in which people can more fully express their humanity.”⁸ One aspect of the medium that made relationship building difficult is the fatigue that was experienced in lengthy phone conversations. Research methodologist Paul J. Lavrakas noted that this was a real factor limiting prolonged telephone-based surveying. By the 1990s he reported, “It is tiresome to keep the average person on the telephone for longer than twenty to thirty minutes, especially for many senior citizens.”⁹

Despite the significant drawbacks discussed earlier, telephone surveying became the dominant vehicle for the surveying industry by the late 1980s. This discussion of the early merits of telephone versus face-to-face interviewing usefully highlights the pull and push of doing distance work and underscores some of the challenges that distance work can include. While the work of these interviewers was often fundamentally different from oral history, the insights they gained in their research can inform our understanding in working in this new remote era.

It is important also to remember that these observations about the challenges of interviewing via telephone were made in the pre-smartphone age. Although the convenience, ease, and familiarity of the telephone continue to make it a possible medium for oral history interviewing,¹⁰ the introduction and widespread adoption of the cell phone and then smartphone have brought fundamental changes to our relationship with phone-based communication. Principally, these devices are now used for a host of other applications besides voice-to-voice exchanges. The rise of competing functions these smartphones are used for and the explosion of other modes of communication has meant fewer traditional phone calls. Even by late 2014, 62 percent of users in the United States reported that they made or received phone calls “a little” or “not at all.”¹¹

While the telephone nevertheless remains a facet of the distance oral history tool kit, emergent technologies in the new millennium ushered in a myriad of inventive mediums for remote oral history work beyond the phone conversation. The foundations of the digital revolution emerged in the 1980s and began to make significant inroads into the work of oral historians by the end of the century.¹² Early discussions of the possibilities presented by this new era centered on the promises of digital recording and internet-based dissemination of oral history. For recording, oral historians navigated the transition from analog audio and video to new formats that

offered higher-quality, lossless reproduction and more accessibility. In the early digital age, oral historians also noted the great potential in the growing phenomenon of the World Wide Web. In her important early survey of oral history's engagement with the internet, oral historian Mary A. Larson highlighted the ways in which it was being most used by oral historians at the time. This included making both transcripts and recordings available online, sharing instruction on methodology over the internet, staging community and school-based projects, and exhibiting oral history.¹³ This early period of web-based oral history revolved around the space as a tool for sharing and presenting oral history.

The evolution of web-based elements considered by Larson were more fully exhibited over a decade later in the large-scale Oral History in the Digital Age (OHDA) initiative, a project funded by the Institute of Museum and Library Services and first published online in 2012. A wide range of contributors to OHDA sought to establish new best practices and approaches for the breadth of digital oral history practice. The project includes some thirty sections that treat everything from planning to preserving oral history. Of the extensive coverage OHDA offers, however, no pieces deal with fully remote projects, and there are scant mentions of distance recording.¹⁴ The concept of fully remote projects made possible by new technologies was not evident among the resources and advice presented here by these oral historians. For the mentions that do occur in OHDA, computer-based recording primarily referred to face-to-face sessions using the computer as an audio recorder.¹⁵

For the contributors to OHDA during the phase of the digital revolution it encapsulates, it would have been hard to conceive of the ways in which remote interview work would be widely employed by oral historians within the next decade. In that same era, however, the framework was being laid to make it possible. As voice- and video-over-internet technologies developed around the turn of the twenty-first century, some researchers began to view the medium as a viable option to conduct interviews. Skype, first released in August 2003, was a groundbreaking tool in this regard. The platform garnered twenty-three million registered users in just its first eighteen months.¹⁶ It launched a boom in this budding tech sector that would eventually be filled out with a host of competitors in the telecommunications marketplace, including Zoom, Teams, and Google Hangouts.¹⁷

Rise of Videoconferencing

As videoconferencing became popularized over the first two decades of the twenty-first century, interview-based researchers naturally weighed the merits of the approach for their work. In justifications reminiscent of early telephone-based projects, interviewers principally argued that videoconferencing saved significant time and money over traditional face-to-face interviews.

They also noted that the expansion of internet coverage and the rising familiarity and affordability of these new tools made the approach a viable one. In their 2009 project conducting qualitative interviews with rural hospital personnel in Canada, professors of nursing Monique Sedgwick and Jude Spiers engaged participants spread over 640,000 square kilometers in western and northern Canada. It was a hybrid project that utilized telephone and videoconferencing as well as face-to-face interviews. This extensive initiative spanned a large geographic footprint and stayed the course, recording remotely, despite occurring in a season where some regions covered by the study experienced a thirty-year record snowfall.¹⁸

Avoiding travel and lowering the cost are just two of the many reasons why project researchers chose to do distance interviewing in this new age. The nature of psychologist Paul Hanna's study on sustainable tourism led him to feel ethically obligated to give participants the option of an in-person or remote interview, resulting in his Skype-based interview project in 2012. He states in an article reflecting on the project:

It was considered essential for the participants to have a choice in the research medium as conflict could have arisen between their ecological principles in relation to transport and climate change, and the researcher traveling vast distances to conduct the interview. This issue was made particularly salient as the recruitment process was conducted through the internet and a number of participants were situated many miles from the researcher's location in the southeast of England.¹⁹

When framed this way, all narrators outside Hanna's geographical area chose Skype instead of researcher travel. In this case, the concern about the carbon footprint that a traditional face-to-face project would generate became a primary factor in the decision to go remote, and the interviewer agreed to avoid alienating individuals who did not feel comfortable with him journeying to them. The case of Paul Hanna's project suggests there could be a host of reasons why remote recording may not only be more practical but perhaps a more ethically acceptable approach.

By the early 2010s, the use of videoconferencing in professional settings was becoming much more common. In a survey of more than five hundred human resources managers that year, six out of ten companies indicated they were now often using video to interview job applicants.²⁰

In their Skype-based 2013 study, PhD researchers Hannah Deakin and Kelly Wakefield argued that, based on their experience, videoconference interviews should no longer be viewed as "alternative" or "secondary" but that "online interviews can produce data as reliable and in-depth as produced during face-to-face encounters."²¹ They also argued that the medium benefited the participants in some important ways. They noted that narrators often

stated they did not have time to be interviewed face-to-face but opted to participate when the option of Skype was offered. Narrators also only had to provide a Skype name, perhaps not even their real name, rather than extensive contact details to make the interview happen and could easily disconnect when they wanted to.²² As a factor of this, the investigators noted that incidents of absenteeism were more likely among Skype narrators.²³ To build greater rapport with their participants, Deakin and Wakefield exchanged a number of emails with their narrators leading up to the actual interview. They argued this important correspondence built connection and that these steps “would not have been taken had all of the interviews been face-to-face.”²⁴ In this case, the researchers had great confidence in a growing role for online video interviews as a medium for in-depth research.

Other researchers expressed similar sentiments with the ongoing improvements in videoconferencing and the stability and speed of internet connections. Although they recognized a loss of social contact and interpersonal energy by not sharing the same space with the narrator, researchers Valeria Lo Iacono, Paul Symonds, and David H. K. Brown noted that participants were in a more comfortable environment and tended to talk longer via Skype.²⁵ Interestingly, they also observed that their older participants, over the age of 70, were quite comfortable using VoIP (Voice over Internet Protocol) links in their 2015 study, “while some much younger interviewees admitted to struggling to get connected.”²⁶ One of the most interesting conclusions they drew from their use of distance recording was their belief that the use of videoconference interviewing was moving research “towards an opportunity for a more democratic research process” by eliminating distance as a variable that prevents narrator participation.²⁷

Reflecting on a project that blended in-person and distance interviews, social geographer Susie Weller’s comments mirrored the sentiments of a handful of other researchers who began to question the view of the copresent, or in-person, interview as the “gold standard” of qualitative research.²⁸ Her study used Skype and FaceTime platforms to engage with narrators who had previously had face-to-face sessions.²⁹ In a follow-up survey, project participants rated their experience as “good” with “83 percent regarding the distance interview as ‘good as a home visit,’ and all described feeling comfortable with a remote interview.”³⁰ Although project participants were in their mid- to late-twenties at the time of the project, these statistics reflected a growing comfort and sometimes a preference for distanced interactions on the part of narrators.

For researchers who discussed the merits of videoconferencing, they often argued that the ability to see participants was of great value to them in their efforts. The additional data that was captured through adding video and the better ability to read and interact with narrators was much superior to the earlier standard form of distance work: the telephone.

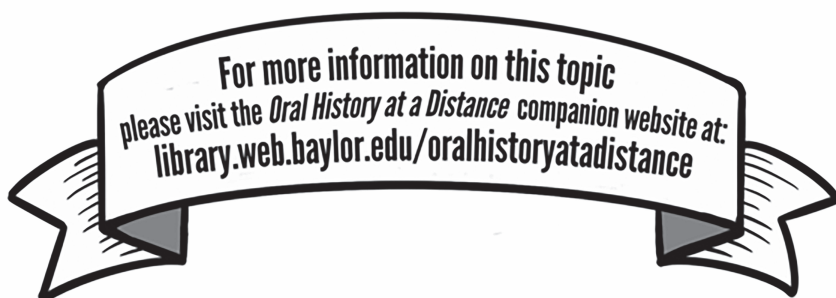
Although not widely used by oral historians yet, the digital revolution, expansion of internet coverage and speed, and introduction and adoption of new tools all provided the foundation to expand videoconferencing dramatically in the 2010s. In the United States, by 2020, over 90 percent of adults reported that they used the internet. That figure compares to the 63 percent that used the internet the year that Skype was first introduced in 2003.³¹ Worldwide that number grew to over 60 percent of the population regularly using the internet by 2020.³²

Although much of the infrastructure was in place, the COVID-19 pandemic proved the tipping point for widespread adoption of video calling. For oral historians early in the pandemic, however, the season was initially seen as a temporary interruption in the normal course of traditional face-to-face oral history work. In the US, the Oral History Association (OHA) organized a Remote Interviewing Resources Task Force in the face of the COVID-19 shutdowns to equip practitioners with the tools they would need to ride out the crisis. In August 2020, the group published their recommendations.³³ Central to this suite of resources was a decision tree “meant to be a visual representation of the many considerations undertaken in determining the best path for connecting and recording in remote oral history interviewing.”³⁴ The first step in this tool is the following question: “Is it *possible* to conduct an in-person interview” (emphasis mine). If the answer is yes, the path leads to doing a standard face-to-face interview under the existing OHA Principles and Best Practices. This reflected the strong commitment most oral historians still held to the copresent, in-person interview if it was at all feasible. Despite the changes in technology and the rise in videoconferencing, this advice echoed much earlier sentiments evident in the Oral History in the Digital Age (OHDA) project. Within that resource, in a rare mention of remote work, distance recording was regarded as an if-all-else-fails option for oral history. Museum educator Marsha MacDowell, in her OHDA piece on project planning and management, responded to the question “Can phone or Skype be used?” by stating, “When there is *no other way* to record an interview that is critical to the purpose of the project, an interview can be done by phone or over the internet in a real-time format” (emphasis mine).³⁵ From these directives, it seems there is only a single reason to record via distance: if no other options are available.

While oral historians stressed the priority of face-to-face work early in the pandemic, in a relatively short period the crisis created an upsurge in both the familiarity with and openness to connecting via videoconferencing. In the United States, by September 2021, 81 percent of Americans who participated in one survey reported they had used video calling or videoconferencing during the pandemic.³⁶ This was twenty-one times pre-COVID levels.³⁷ In relatively short order, the pandemic created a society-wide crash course

that both familiarized people with the tools and normalized the practice of videoconferencing.

As a result, in the post-COVID-19 pandemic age, oral history settled into an altered environment and relationship to distance projects. No longer can a remote approach be seen as the method of last resort, but it is essential to assess the qualities of distance oral histories to gauge whether it is the best option for a particular project or narrator. Although some initiatives may continue to pursue fully remote oral history, it is much more likely that a blended face-to-face/remote approach will be part of the oral history tool kit going forward. The certain strengths and flexibility that remote work brings to oral history practice can no longer be ignored. In this volume, *Oral History at a Distance*, we offer an initial overview of ways to navigate the additional opportunities and challenges this new era presents to oral historians.



Despite the novelty of this new approach, it is important also to take a longer view of this shift. The development and expansion of oral history has always been tied to advances in technology, and the increased incorporation of distance or remote recording is a next phase in the evolution of practice. In fact, the earliest “remote” work with oral history was made possible by field recorders that developed midcentury and became more affordable and accessible in the 1960s and the 1970s (see Figure 1.1). Early portable audio and video recorders enabled oral historians to capture what was inaccessible before, and they moved into new spaces and employed new tools to do it. As has also been seen earlier, the digital revolution led oral historians to extensively reconsider and rethink elements of oral history practice around the turn of the twenty-first century. In this current epoch, it must be done again as oral historians engage in remote work. Although the historic shifts and adoption of new tools have never been as rapid or dramatic as it was when COVID-19 cut off the prospects of face-to-face interviews, it is not surprising that oral historians are embracing new approaches. There is a long tradition of openness to refining what we do and to utilizing innovative tools to best help us accomplish our task.



FIGURE 1.1 In this photograph, circa 1973, Dr. Thomas L. Charlton heads out from the offices of the then Baylor University Program for Oral History to conduct “remote” recording. Charlton, the founding director of the program, takes with him a portable reel-to-reel analog recorder and a briefcase that includes a microphone, extension cord, and cables. (Photograph property of Baylor University Institute for Oral History)

Going Remote with Oral History

By reading this far, it is evident that a fully remote or hybrid project is a possibility for you, the oral historian. As will be discussed shortly, a host of considerations might push or pull oral historians to shift to distance work. These could come from external factors that dictate remote recording or from internal project or program choices to select a remote or hybrid design for your oral history initiative. Here are some selected elements that could shape such decision-making, but each project or narrator could present new reasons to consider doing oral history at a distance.

External Factors

As was quickly made plain, the COVID-19 pandemic presented the ultimate instance in which external factors dictated a shift to remote oral history. Although a revised course may have been forced upon project leaders under shutdown conditions in this instance, oral historians, going forward, will need to weigh a host of additional external factors in deciding to go remote or to restrict to face-to-face projects. Due to circumstances beyond the control of project planners, it may often be possible, but not advisable or feasible, to conduct copresent oral history.

A primary motivator that drove certain sectors to embrace the telephone-based interview in another generation still looms as a prevailing external factor in the current environment: the relative cost savings of remote versus face-to-face projects. Rising travel costs are the most conspicuous element here, but oral historians should think broadly in terms of the cost of face-to-face versus distance projects. Weighted costs should include the reduced travel time it will take to conduct interviews and the overall increased speed of data collection for the project.³⁸ These savings can be exponential in cases where the planned interview pool is geographically dispersed. It is also important to remember that the total cost for a primarily face-to-face project should also include factors that may lie outside clear budget entries, as seen in the earlier discussion of Paul Hanna's narrators embracing remote interviews to lower the carbon footprint of his research on sustainable tourism.

An additional external factor that can dictate the need to go remote is the concern for safety. Conditions could prevail that make this an issue for the narrator, the interviewer, or both participants. If either party's well-being could possibly be threatened by meeting or conducting the interview, a remote option may be the best choice. This concern could be manifest in several settings, some extreme and others more subtle.

The shift to a remote oral history project may also be needed to expand access to and availability of narrators. One aspect of accessibility to be considered here are potential connectivity issues for narrators. Despite the advances of the digital age, this may still be a real obstacle for some researchers,

especially when working in rural areas and the developing world. Although the percentage is much higher in the United States and Western Europe, only 60 percent of the world's population are internet users.³⁹ Of those who are connected, only about 16 percent of the world population has access to fixed broadband.⁴⁰ This inconsistency in connectivity presents some substantial challenges to staging remote work in certain environments.⁴¹

Another aspect of access is not just about connectivity but also the ability to gain access to potential narrators. An online connection is a much lower-stakes approach than getting agreement for a face-to-face interview. The ability to conduct certain interviews in a remote fashion offers a much greater level of sensitivity to the needs of a narrator. It may come down to a narrator's comfort level for the meeting. Some project participants may find online interactions less daunting than person-to-person. One participant in Susie Weller's project described the "pressure of presence" that came from being copresent with the interviewer. The individual described this feeling as the following:

It's like when you are doing interviews for unis [universities]. . . . When you're sitting in a room with someone opposite you, you feel a lot more under pressure than when it's over a computer, so I guess it does give you a freedom to sit back and actually think. So in that way I think it was quite nice actually, as pressure does get to me a little.⁴²

Face-to-face interviews may feel more invasive to project participants as they are often done in narrators' homes.

Related to this issue of accessibility and availability is the fact that distance recording often enhances narrator control of the interview process. As psychologist Amanda Holt noted about her work with narrators, "If I called at the agreed time and something had come up for the narrator, there was no embarrassment or difficulty in re-arranging the appointment (as there may have been had I turned up at their door)."⁴³ The same is also true for narrators with removing themselves from interviews once agreed to. Disconnecting a remote link is effortless compared to walking out of or asking an interviewer to leave a face-to-face meeting.

Internal Factors

Even if certain external factors surrounding an oral history initiative fail to tip the scales in favor of remote oral history, internal project aspects may make it the better choice. New technologies to facilitate the interaction and increasing familiarity with distance recording platforms can combine with internal considerations that may lead oral history project planners to choose to go fully remote or to embrace a hybrid approach in conducting their oral history projects.

If it is a high priority to centralize data collection for a project, then remote oral history might be a better solution than face-to-face interviews. This can

allow data collection to occur from one place and can provide for more supervision or quality control throughout the work of the project if needed.

For project planners, the introduction of videoconferencing technology has dramatically expanded the number of oral historians who now bring video content into the media produced from their efforts. Although video has been a part of oral historians' work for decades, distance recording has brought it en masse.⁴⁴ In more traditional face-to-face interviews, practitioners must weigh the additional costs of including video (equipment, personnel, etc.), but the added cues and connection that come from including video in remote interactions also bring in richer data and a fuller perspective of the narrator into the recorded media. There are real reasons to leave the camera on in videoconferencing as research seems to indicate that participants are much more engaged when they have their cameras turned on rather than off.⁴⁵ The shot provided through videoconferencing also, for the first time in most cases, documents a view of the *interviewer* as well as the narrator. This has been a mostly unrealized framing for a filmed oral history exchange prior to videoconferencing. This configuration contributes a considerable amount of information to the oral history record that was often not included.

A final internal factor that can determine if distance oral history work should be embraced is the nature of the research project pursued. For example, the evolution in areas of study can be a big contributor to the need to expand the geographic footprint of a project. In the discipline of history, for example, shifting historiographical frameworks to understand the past have moved away from the traditional nation-state focus. An explicit pursuit of global and transnational topics has emerged within the realities of globalization and views of an interconnected world since the turn of the last century.⁴⁶ Within these new frameworks, fresh connections are being made on topics, issues, and phenomena that had been previously seen as disconnected and beyond comparison. Remote work can expand an interview pool in ways unimaginable with face-to-face interviews. Due to factors such as this, there is now, more than ever, a call for academic historians to incorporate transnational frameworks into their oral history projects.

For projects seeking to organize a longitudinal study with narrators, remote interviewing may provide the best option. Over longer periods of time, it may assist with standardizing interview arrangement as well as retaining participants in the study even as their status or location changes. This may be of particular benefit to longitudinal studies working with populations in transition.

Factoring in the Distance

All the internal and external considerations discussed earlier can offer solid reasons to turn to remote work. Those factors, however, must also be weighed against the drawbacks to moving away from the copresent interview. Most

of the disadvantages of distance work center around the changed position of interviewer and narrator. Not being copresent in the interview sessions can have a range of impacts on the exchange between oral historian and narrator. The greater social distance can present some challenges to rapport building and establishing trust with narrators. Some evidence also suggests that narrator responses can offer less depth and detail in distance formats. Distance recording offers some complexities that will need to be addressed as research moves forward with oral history.

The issues explored earlier are just a few of the factors oral historians should study as they consider distance oral history. Just as oral historians in the past weighed matters such as analog versus digital, video versus audio, media versus transcript, practitioners now can evaluate the choice of copresent, distance, or hybrid oral history.

Conclusion

Oral historians have come a long way from lugging around wire recorders in the early analog era.⁴⁷ In the current age, the reality is that an oral history project could centralize recording using video from a single location, researching and interviewing worldwide. Now recording at a distance can be done without travel time and additional cost. New tools have enabled a host of possibilities that would have been difficult to conceive when oral history first emerged as a research method. It gives oral historians the ability to be much more flexible and responsive in their work, but it raises a host of new questions about practice. In this book we offer some initial insights into the ways remote projects can be effective and intentional oral history. This volume offers direction and raises some important questions on the aspects of oral history practice that have been reaffirmed and those that have shifted in the new remote or hybrid age.

We must remain flexible and open but committed to core tenets of practice. Still amid the COVID-19 pandemic, one survey respondent, when asked about the ways in which remote recording will change oral history, simply replied, “I’ve learned from this experience not to make predictions.”⁴⁸ A cryptic but true comment. While we cannot predict the future, we head into it with a strong foundation, fresh creative tools, and an adaptable mindset.

Notes

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- 3 Roger W. Shuy, "In-Person Versus Telephone Interviewing," in *Handbook of Interview Research: Context and Method*, ed. Jaber F. Gubrium and James A. Holstein (Thousand Oaks: Sage Publications, 2001), 537–56.
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- 7 Robert M. Groves and Robert L. Kahn, *Surveys by Telephone: A National Comparison with Personal Interviews* (New York: Academic Press, 1979), 222.
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- 17 Voice over Internet Protocol (VoIP) technology provided for conversion of voices to a digital signal for calls directly from a computer. By March 2020, the Skype videoconferencing and video call platform was used by 100 million users at least once a month and by 40 million users each day. See Fredric Lardinois, "Microsoft Teams is Coming to Consumers—But Skype is Here to Stay," *TechCrunch*, March 30, 2020, <https://techcrunch.com/2020/03/30/microsoft-teams-is-coming-to-consumers-but-skype-is-here-to-stay/>.

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2

PROJECT DESIGN

Adrienne A. Cain Darough

People follow many paths to oral history. It usually begins with an idea: perhaps an individual or community group who wishes to document their past, or a university-based oral history program with a staff of experts and a trusted archive to process and keep the oral histories. Possibly, a family get-together sparks an interest in preserving oral histories for future generations, or a high school teacher encourages civics students to explore a local controversy by interviewing community members. Maybe a writer wants to base a new book on the multiple voices in a social movement, or perhaps an employee wants to capture their company's institutional history. Or it could be members of a fraternity or sorority who want to document the history of their organization's local chapter. No matter the purpose of the oral history project, a lot of planning should take place and steps followed to achieve the best results. Project design is the first step for any oral history endeavor.

What It Is and Why It's Needed

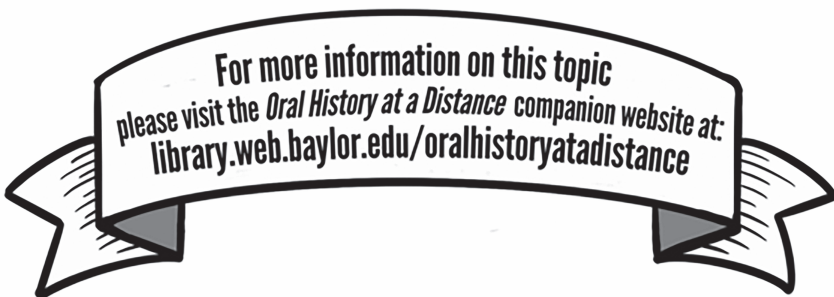
So you may be asking, What is a project design? As noted by Monday.com, a project-planning platform, your project design “serves as a central hub to define, organize, prioritize, and assign activities and resources throughout your project's life cycle.”¹ For now, we are solely focusing on project design, as project management will be covered in Chapter 4, “Managing Remote Projects.” What's the difference? Project design is the *planning* of your project, while project management is the *execution* of your project.

The project design is the essential first step to the success of any oral history project. It is a written narrative that explains and describes the full project, helps keep the project on track, defines roles and expectations, is useful

in recruiting volunteers, helps with publicizing the project, assists in getting informed consent from all involved with the project, and is useful for writing grants and funding proposals.

Think of it this way: the project design for an oral history project functions in the same way that a blueprint does for the construction of a building. The development of the blueprint consists of a great deal of research, surveying, and executing precise formulas and calculations. The blueprint allows all parties involved—the architect, builder, designer, etc.—to be on the same page. According to the online education platform EDUCBA, the blueprint is “a design or a technical drawing which explains the overall details of the component.” Furthermore, the blueprint “can be used to understand and explain the detailed plan of work,” and “drawbacks of the design can be identified and improved instantly.”² When a question arises as to what happens next or how something should work, the blueprint is consulted. When a deviation occurs from the blueprint, everyone involved is notified and kept abreast of changes. Flexibility is key because things can change: supplies can be delayed or deadlines may have to be pushed back. Your project design should essentially work in the same manner.

The project design is even more important when working with groups remotely. When participants are not able to be in the same space, the need for clear and effective communication increases. The project design should always be accessible to all parties involved in the project. This can be achieved by using shared drives, cloud-based software, or electronic delivery. Several planning and communication platforms can be used to achieve this, many of which can be accessed for free.



Working remotely increases the need for clear, effective communication which can be achieved through a strong project design. Since the COVID-19 pandemic, much research has been devoted to and conducted on the effects of communication within remote settings. In 2021, a major study was conducted involving more than sixty thousand remote workers at Microsoft—arguably one of the largest studies, if not *the* largest study, on remote work ever conducted.³ One of the major conclusions of this study was that clear,

concise, and consistent communication is paramount when working with remote employees. The same is true for your oral history project. Although you won't be working with thousands of partners, think about some of the ways you can best communicate with your group. For instance, are all communications coming through the same way? Are team members able to access communications and materials easily?

For example, I am part of a team that is working on an oral history project to document the history of football at historically black colleges and universities (HBCUs) in the Southwestern Athletic Conference (SWAC). The director for this project is an independent researcher and does much of his communication through Google—Google Meet, Google Drive, all Google—and understandably so. Google products are free and easy to navigate, and almost everyone knows how to use and access them. However, when the project director sends me Google links to access documents or attend meetings, my Microsoft Outlook–based email address makes it quite difficult to access otherwise easily retrievable materials. Although simple, this is an example of small things to consider when working remotely with groups.

Brainstorming: The Very, Very Beginning

Whether you are working alone or in a group, sit down with pen and paper or with a virtual shared document to think and talk through your project. Write down these questions, and try to answer them. It's okay not to have specific answers immediately, but even a discussion will help you to define your topic.

- What do I want to document in this oral history project?
- Why does it need to be documented, and why is now the time to do so?
- Who are the people I need on my team to make this happen?
- Who will be responsible for what?
- What will happen to the interviews after I conduct them?

Choosing and Researching Your Topic

Research is extremely important to an oral history project and is an essential step in preparing for interviews. Conducting research helps you to become more knowledgeable on the topic, which in turn helps you to know what to look for when choosing narrators, and it also aids you in developing topics and informed questions to discuss with your narrators during interviews. As stated by oral historian Valerie Yow, “We cannot skip careful preparation and achieve anything but random conversations.”⁴ Research is needed to help focus the topic, make useful connections in thinking, place the topic in its historical context, locate narrators and learn more about them, and create informed questions. While conducting research, make note of common

themes, stark contrasts, or information that is missing regarding your topic. These notes will be helpful when forming questions to ask your narrators and when framing your project.

When starting your research, think of the following: What interests you? What do you want to know and/or learn? What research would inform the goals of the project? Is oral history the appropriate method for doing so? Let's define the term *appropriate*. For it to be oral history, it has to be a topic within living memory, which means people who experienced the topic firsthand are available and can tell you what you want to know. For example, as of this writing it is very possible to conduct an oral history project focused on civil rights protests of the mid-1960s, as many who were active in and witnessed protest activity of the time are still alive and can share their experiences. However, it is *not* possible to conduct an oral history project on the US Civil War. No one is available for us to talk to from the 1800s who served as an eyewitness or participant in that war (unless somehow a *séance* is involved, and that would be an *entirely* different book).

In addition to being within living memory, one should ask if the topic contributes to historical understanding. In other words, would an oral history project about this topic provide any new information? Will these stories contribute a fresh or different perspective? Will the project help fill in any gaps found in the historical narrative? For example, we have a collection at Baylor University Institute for Oral History (BUIOH) dedicated to the history of Baylor University that contains over one thousand interviews with former students, deans, administrators, faculty, staff, and individuals who experienced Baylor in several of these roles. Since Baylor is a private, Baptist, predominantly white institution with administrations that were broadly male dominated, this collection heavily reflects that. However, several other experiences and perspectives are missing. What about incorporating the voices of more women, people of color, people outside of the Baptist faith, those of differing sexual orientations, those of a different socioeconomic status, and international students? Because each of these experiences can vary, we are dedicated to having our collection be more reflective and representative of the people who attended and contributed to this university, and we actively seek diverse stories from alumni and former faculty, administrators, etc. who may be under-documented. One great aspect of going remote is that our alumni have dispersed all over the country and world, and remote interviewing allows us the opportunity to document their stories without worrying about getting to the same space or waiting to schedule an interview during the next homecoming weekend or major alumni event.

Furthermore, consider the sources you will use for your research. Some valuable places would be local archives or one related to your research

topic where you might find newspaper clippings, photographs, yearbooks, scrapbooks, etc. One great thing about the digital age is that many of these resources can be accessed electronically from the archives and institutions that house them. This means if a resource is available in a different state or country, it is still quite possible to get access to that material. Each archive will vary on how to remotely access their holdings, so be sure to talk with the archivist or librarian at that archive about doing so. Digging into the archives, whether that be a physical dig or an electronic one, helps to garner an understanding of what has been documented and assess what is missing. Is there a lack of variety in what was found? What counternarratives may be valuable? Has a significant amount of time passed that could warrant a reflection on the topic? Do you notice a lack of diverse perspectives in the resources? Could this oral history project provide what is missing?

Depending on the topic, an overwhelming amount of research or resources may be available. If that is the case, consider adjusting the scope of your project design to narrow the topic. To illustrate, let's go back to our hypothetical oral history project about civil rights. A simple internet search for "civil rights" results in 2.67 billion hits for websites spanning decades, places, and

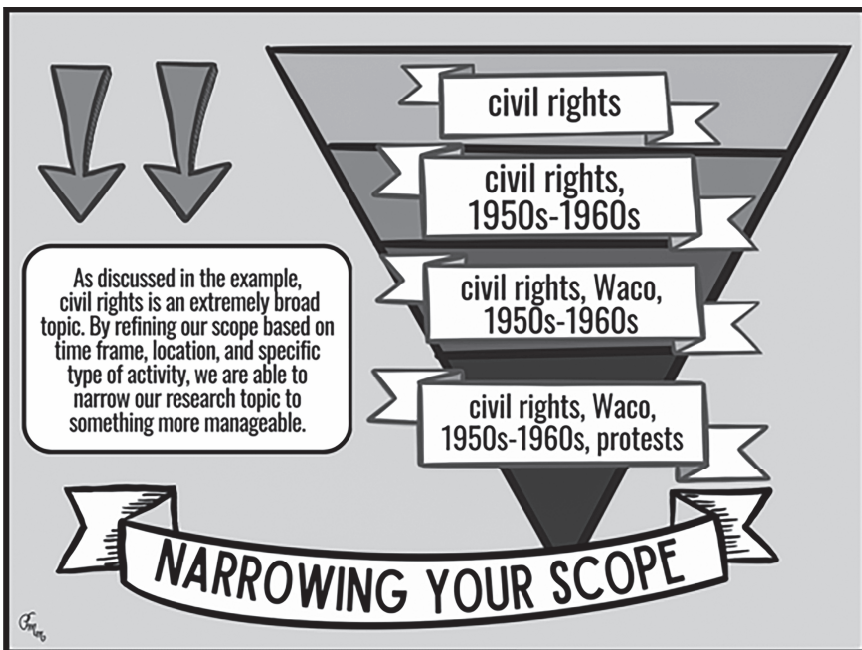


FIGURE 2.1 Narrowing Your Scope

topics.⁵ By narrowing the time frame to a specific decade, that reduces the amount by over 99 percent, yet still produces 25.1 million hits.⁶ At this point, it is imperative to narrow down the specifics. Perhaps a specific location, preferably one that is known and may be able to be easily researched, can help further narrow the results to a more manageable amount. If that location still has an overwhelming amount, the focus can then be narrowed to a specific activity such as protests, sit-ins, marches, or organizing efforts. So the research goes from starting a project wanting to know more about the civil rights movement and then narrowing down the era, further narrowing down to a specific location, even further to a specific type of activity, and then developing a specific focus from that research. Therefore, it goes from civil rights to civil rights protest marches in Waco, Texas, throughout the late 1950s to early 1960s.⁷

In the case that the topic has become too narrow and you are unable to find adequate research, just move back a step and widen the net again. The next illustration displays widening the geographic location from Waco (city) to McLennan County (county) to Central Texas (region). By widening this scope, you are able to increase your research options and potentially your narrator pool.

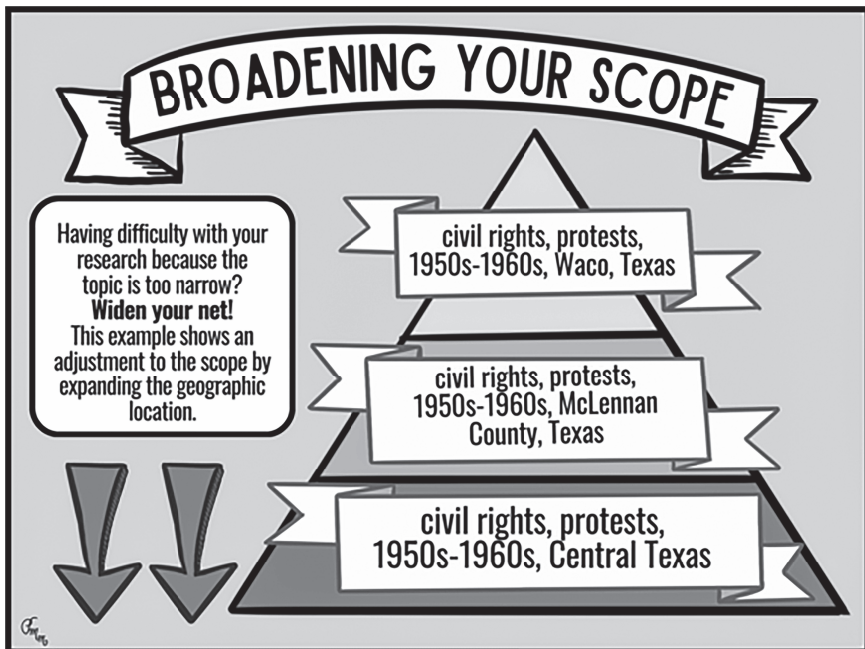


FIGURE 2.2 Broadening Your Scope

Urgency and Necessity: Why Now? Can This Topic Wait?

As noted in the Oral History Association’s Remote Interviewing Resources,⁸ one crucial question to ask is if this project has to be done now or if it can wait. Apparently, you have made or are heavily considering the decision to conduct your project remotely, hence your reading this book. Just know that you are not alone. Of the workshop participants we surveyed about their project experience during the pandemic, nearly half (48 percent) decided to continue conducting interviews but adjusted to a remote setting.⁹

The safety and comfort of the narrator is paramount. As oral historians, we should always consider the risks we pose to our narrators and find the best solutions that work for them in this process. Although no one likes the idea of having to postpone, it is important to weigh the pros and cons of waiting to conduct this interview in person versus conducting this interview now in a remote manner. You should consider the following:

- Is the narrator of a particular age, making this a time-sensitive matter?
- Is the narrator in a location that is difficult for you to get to right now?
- Does the narrator have mobility issues or impairments that make travel difficult?
- Is the interviewer or narrator immunocompromised?
- Is it safe to visit this narrator in person?

Furthermore, technological hindrances may arise. Is the narrator tech-savvy? Are they located in an area that may pose issues with internet connectivity or cell phone reception? When thinking through these questions, also consider whether these situations are temporary or more permanent. Whatever the choice, be sure it is a decision that you, your narrators, and your team members are comfortable with.

Assigning Roles and Tasks

I’m not sure what your school experience may have been like, but I’m pretty sure it included a group project or two along the way. You may currently work in an environment where you must engage with a team on an everyday basis. From your experience with working in groups, you may have learned the importance of assigning tasks, requiring accountability, keeping everything on track, and making sure everyone is on the same page—or at least the same chapter. Your oral history project is no different.

A project should have a clear description of roles and responsibilities for everyone involved. Each member should know what their role is and the responsibilities it entails. This is especially helpful when dealing with multiple groups and project partners. Assigning roles and tasks provides a

structure for accountability and helps build informed consent for all project participants. Informed consent will be explained in greater depth in Chapter 3, “Ethical Considerations for Remote Projects,” but for now just think of it as ensuring that project participants are fully informed on what is going on with the project, what their role is within the process, and what will happen to their interviews. A few questions to consider when determining who will do what:

- Who will direct the project?
- Who will be the contact person?
- Who will purchase the equipment or licenses needed to conduct the interviews? Who will own and maintain these items?
- Who will manage loaning out equipment to team members and possibly narrators?
- Who will hold copyright?
- Should the interviews be transcribed? (The answer is yes.) Who will do the transcribing?
- Who may use the recordings and/or transcripts? For what purposes can they be used?
- What other organizations or people will be collaborators on this project?
- Who has the time and capacity to work on this project? What skills and talents are they willing and able to contribute?

Larger projects—those of a longer duration or with multiple partners, team members, and/or narrators—could greatly benefit from the development of a memorandum of understanding, or MOU, which is a documented agreement between parties that spells out the responsibilities and expectations of each party involved.¹⁰ An MOU can be extremely helpful in instances of unexpected change, such as the COVID-19 pandemic. In addition, when partnering with organizations, think about different ways they can support your project. It may not be monetary support but, instead, access to a variety of things that could be beneficial to your project, such as space, recording equipment, transcription, and archiving. For example, here at BUIOH, we partner with faculty members, students, community groups, and external scholars who want to conduct interviews for their areas of research. In many cases we offer them the use of our recording studio (space), the use of our recorders and/or enterprise Zoom account (equipment), a digital folder in our institutional cloud-based storage area (access and temporary storage), and transcription of the interviews via our student workers.

When assigning tasks, please be mindful of the fact that oral history projects may cause more work for people outside of your team as well. If your project involves the labor or skills of others, make sure they are included in

planning discussions. For example, if I know that my project will involve uploading materials to my organization's website, I would contact the head of that department to inform them of my plans and see if this is feasible for that department's workload. Again, in the next chapter we will dig into informed consent, but keep in mind that it means making sure all parties are knowledgeable about the oral history project—especially the areas in which they are involved.

Roles and Responsibilities

Now let's look at assigning roles and responsibilities. The assignment of tasks varies a great deal from one oral history project to another, depending (mostly) on the size, scope, and duration. Sometimes in a small project, such as one headed by a local history museum in a small community, one person does everything. On the other hand, a project planned within a large university or government entity that has sophisticated technology and many scholarly resources may have many hands on deck and the ability to create committees in order to ensure that roles are filled and the work gets done. Since most oral history projects lie in between these extremes, here are a few basic roles that need to be covered.

Project Director

Every project needs a director or leader, which may very well be you. The project director's role is to lead the project according to its design and to keep everyone involved in the project informed about the progress or any changes. This person also oversees all tasks (the budget, research, narrators, outcomes, and more), ensures that the tasks for the oral history project are properly covered, and guides any necessary pivots. In a sense, the project director can be seen as an orchestra conductor, making sure that the project stays on track and that all components are harmonious and in sync. The project director is the primary contact person and final decision-maker during a conflict.

Researcher/Subject Expert

As discussed earlier, research is a crucial part of an oral history project. Therefore, you may have a dedicated researcher for your project. This role might be filled by an external subject expert or someone on the team. Background research almost always includes library research among primary and secondary sources. It also can include conversations with members of a community being documented.

Interviewer

You also need interviewers, people dedicated to conducting the interviews for your project. Interviewers should have good people skills and be good listeners. They also need to be comfortable with the technology involved in doing oral history, since conducting interviews at a distance requires even more skill in managing technology.

Other Roles

Chapter 4, “Managing Remote Projects,” will discuss additional project roles, but be sure to assign responsibilities to each role for accountability in case anything is needed or goes awry. For example, when a piece of equipment needs repairs or is missing, then we know to go to the person in charge of equipment to get that issue resolved.

Now, you may be reading this and saying, “My team consists of me, myself, and I.” Please know that it is feasible to do an oral history project solo, but you may want to consider where you could get some help if needed to keep you from overworking or burning yourself out and to provide some support for your project.

Constructing a Project Design Statement

Now that we have established a foundation for what a project design is and why it is important, we can begin to develop our project design, which is a well-thought-out narrative that states the title, topic, methodology, scope, potential narrators, potential outcomes, selected archive, and time frame for the project. This narrative will be extremely helpful when explaining your project to potential narrators, seeking grant funding, and keeping track of your project. Let’s look at each element one by one.

Title

Though it seems simple, it is actually quite important to choose a title. The title of an oral history project should be clear, concise, and reflect the topic and stories gathered in the project. For example, if one is conducting an oral history project titled “Stories of Waco, Texas” but only involves the stories of people who went to or worked at Baylor University, then the title does not accurately reflect the project. In addition, you want something that is catchy but uncomplicated. With titles, it is appropriate to stick with the KISS method (Keep It Simple, Sam).

Topic and Purpose

This element is where all of that research comes in handy. Here is where those original brainstorming questions come back: What is the purpose for

conducting this project? What is it that you want to learn or discover? The research conducted will provide a backstory for the project, shape the narrative of the era in which your subject occurred, and help you understand the significance of the project to the historical narrative.

Methodology

After setting up the historical background for the project, discuss the methods used in forming this research, explain the gaps or common themes you noticed, create a justification for oral history as the appropriate method, and describe how the interviews will occur. What gaps are present in the preliminary research? Is oral history the appropriate method for this? How will the interviews be conducted?

Think of where oral history could help you fill in gaps that you noticed in your research. Were you searching the school annuals and realized that yearbooks for 1972 through 1976 were missing? Did you notice a lack of diverse perspectives on a topic and feel that it should be revisited? Is an anniversary or commemoration date approaching and you want to collect the institutional history of an organization? Is Grandma turning 100 and you want to capture her life story?

The methodology section could also serve as a justification for the type of interview conducted. For example, is the narrator in a space that you are unable to get to physically but a remote interview is possible? Answers to questions like this could influence the decision to go remote versus in person, to use video or audio, or to choose a particular method of remote interviewing.

Scope (Time and Place)

When determining the scope of your project, ask the following questions: When and where did this occur? What time and geographic limitations are being placed on this project? A determined scope can help focus a project, as in our previous example of refining a project on civil rights. We gradually narrowed it down to civil rights in the late 1950s and early 1960s; to civil rights in Waco, Texas, in the late 1950s and early 1960s; to, finally, civil rights protests in Waco, Texas, in the late 1950s and early 1960s.

Some projects, such as alumni or community projects, make the mistake of foregoing a scope with the idea that the project will cover all aspects of the topic and continue in perpetuity. For example, if conducting a high school alumni project, you want to capture the stories of all alumni. However, by determining a scope for your project, or by limiting the range of your project with specific geographic and/or time limitations, it can help refine a project and create a more focused narrator pool.

Another example, as in the case of the oral history project designed to gather high school alumni stories, involves starting with milestone alumni

groups rather than trying to interview everyone. Is there a specific year of change or a major event that happened in the school's history that should be explored? Did a fire destroy school records and erase a period of that school's history? Was the school previously in another neighborhood, or were major renovations done to it? These are the types of questions that can help you focus on a particular place and time within the overall topic.

Potential Narrators

Many times an idea for an oral history project revolves around a topic, such as a specific neighborhood, a social movement, or an event or natural disaster. In this case, you will be looking for a variety of narrators who can offer their own perspectives about the topic. Other times, as in the case of a life history, the choice of narrator is clear. Whichever path you take, make sure to choose narrators who have firsthand experience related to your topic, are representative of the range of people with experience related to the topic, and can contribute diverse perspectives.

These criteria are crucial for projects that tell the history of neighborhoods or communities. Community oral history projects should include the voices and experiences of those who make up the community, not just the "elite" or more famous/infamous names. When selecting narrators for community projects, take into consideration people who have lived in the community for a long time or who may have generational roots in the location. These are the people who can attest to the changes, comings and goings, and developments within the area and who are able to discuss the effects of changes in their communities.

When choosing narrators for your project, consider the following:

- Who is knowledgeable about the topic?
- What are the characteristics of the people you want to interview?
- What are the limitations?

Even if you are unable to come up with actual names of people to interview, create a list of characteristics you are looking for in narrators. If we continue to go with our topic of civil rights protests during the late 1950s and early 1960s in Waco, I would cultivate a pool of narrators who were alive during that time frame and who also lived in or around the Waco area. Then I would work with that pool to determine their knowledge of, involvement in, or witness to protest activity.

Selected Archives

Oral historians are not only concerned with conducting interviews but also in ensuring that these interviews are available for future generations. Preservation and future access are important factors. When discussing your

preservation plan, it is helpful to determine where and how you will archive your project.

Finding the best permanent home for your oral history project is one of the most important tasks to ensure long-term care and appropriate access. It would be beneficial to store your material in an archive that is local and/or shares the same interest as your oral history project topic. The Library of Congress Folklife Center suggests the following:

As you consider which repository might be a good fit, ask whether the documentation should stay in close proximity to the community of origin. Often, ethnographic materials are the most useful to the people documented and should be kept close to home.¹¹

If you are creating an oral history project documenting the stories of a particular neighborhood, it would be most beneficial to archive the materials in that specific neighborhood (or the closest local archive). However, if no archives in the area align with the topic, maybe widen the search to regional, state, or even national archives.

Keep in mind that not all archives are capable of processing and maintaining oral histories, which is okay. Nor will all archives be able or willing to accession, or take in, the materials you present to them, due to their collections policy or mission scope. Every archive or entity that accessions materials for either research or educational purposes should have a collection policy and/or mission statement. This policy or statement is developed in order to “give direction [or parameters] to the management of and work with handling a collection, both in the present and in the future.”¹² Viewing the collection policy of a potential archival repository can help determine if it is a best fit for your oral history project. One example of an accessible collections policy is the Library of Congress Policy Statements for the Veterans Oral History Project.¹³

When searching for an archives to deposit your interviews, consider a few things: Does this archives align with your project? What level of attention can be given to your materials? What is the ability of the archival staff to care for your materials? What does access look like for your materials (for you and future researchers)? The last thing you want is for the materials you donate to sit on a shelf, unprocessed and unable to be accessed.¹⁴

Although we are concerned about the longtime preservation of interviews and materials developed from our oral history projects, sometimes archiving may not be the best immediate decision. There may even be apprehension or hesitation over whether or not to submit to an archives at all. Are you still actively working with the materials and want to be able to have access to them as needed? Are you unable to find an archive that aligns with your project? Or are you concerned that an archive you initially considered may not be able to care properly for your materials? I once asked a prominent author

who uses oral histories in her research if she had archived her interviews. Although she knew it needed to be done, she had not yet found a place that she believed would give the interview collection the attention and care that it deserved, and therefore she made sure she made multiple accessible copies and kept the originals in a safe space in her home for the time being.

Furthermore, for community and cultural projects, does the local archive accurately reflect the needs of the community being documented? When conducting community projects, it is important to remember that many people from marginalized communities have had their stories taken and sold for profit, whether it be for financial or academic gain, and they are often left with nothing. As we will discuss in Chapter 3, “Ethical Considerations for Remote Projects,” it is important that the work we do and the interviews we conduct correctly represent and reflect the communities we are documenting. Do not fret or grow weary; eventually you will find the right home for your project and interviews.

Projected Outcomes

What are the future plans for the interviews and materials collected? In what ways will you share the stories and information gathered? Will it be through a website, documentary, dissertation, class presentation, session at a professional meeting or conference, or an in-person exhibit at a local community center? When discussing this element, think about what the end goal is for the interviews created for this project. Think through the ways that this project will be shared. Whatever the outcome may be, it should be reflective of the people whose stories created it.

Time Frame

What is the estimated time frame for the project from start to finish? Any milestones? For example, let’s say you want to create an oral history project for the fortieth anniversary of your company or institution. The anniversary is in a couple of years, and you would like to showcase it at a company luncheon. In this scenario there is an established deadline, so you would work backward to determine a time frame.

In creating a time frame, allow yourself two things: space and grace. Throughout this process there will be missteps, bumps in the road, unexpected challenges, and more—especially in today’s climate and environment. Many projects that were in progress in late 2019 and early 2020 came to an unexpected halt due to the pandemic. No one could have predicted that event, but plenty of other project-halting instances can occur: lack of funding, damaged equipment, changes in project focus, loss of narrators, or life interruptions that happen to us all.

Allow yourself time to pivot and the space to adjust your project design as needed. Things that may require adjustments include gathering your pool of narrators, schedule changes (hey, your narrators have lives too), interviewing, transcribing, narrator review of the transcript, etc. Allow time to develop and plan each of the project design elements, and remain flexible. Everyone will be happier.

When it comes to flexibility, Dan Fuller and Jean Greene, with The Utica Roots Oral History Project at Hinds Community College–Utica, know a thing or two. I had the pleasure to serve as a consultant on this project which was funded by a grant from the Institute of Museum and Library Services. Fuller and Greene give this testimonial in their case study:

While we are still in the early days of our project, one of the key lessons that we have learned so far is the importance of flexibility when undertaking an oral history project. Given that we started the project in the height of the COVID-19 pandemic, all our plans for in-person seminars and workshops had to be adapted for remote delivery. Our consultants were able to modify the plans we developed during the grant submission process to provide us with the training we needed. While I would have preferred our original intensive workshop approach with our team, one positive development from the distributed meetings is that the format did allow us more time to process the material we were learning in between each session. . . . As we have navigated all of the challenges of the pandemic, I am thankful that we had a detailed project plan in place as part of our grant-writing research. The effort that we put in on the front end to design the project helped us get off to a strong start and roll with the punches that the COVID-19 pandemic has thrown at us over the past eighteen months.¹⁵

Planning Your Budget

The cost of doing oral history varies enormously, and the cost does not necessarily reflect the success of the final result. Some oral history projects, family oral histories, or classroom projects, for example, use cell phone recorders and free cloud storage, and they are successful with no or minimal out-of-pocket expenses. At the other end of the spectrum are high-profile oral history projects at university oral history programs, presidential libraries, or corporations, where hourly cost estimates could range in the thousands. To give a sense of costs associated with oral history projects, a copy of BUIOH's cost schedule is in the appendix. Please know that everything listed in our cost schedule may not be feasible or required for your oral history project. The best approach is to plan an ideal project, specify which costs are necessary versus which are desired costs, work back and forth to adapt your plan to

your budget, and seek funding to meet the highly desired budget items (like transcription).

Another way to keep costs in line with expenses is to plan a phased oral history project, where a certain number of oral histories are conducted and processed with existing funds. With this model, the oral history team can feel the sense of completion and, at the same time, apply lessons learned from the first phase to the next set of interviews. One example of this is from a model used successfully for the Radcliffe College Alumnae Oral History Project.¹⁶ Project founder/director Alice Abarbanel had obtained a small amount of funding from the repository (Schlesinger Library at Harvard University) and from her local alumna group for the first interviews. She chose to begin with interviews of the oldest alumnae and interviewed six women in their eighties and nineties. These first six interviews turned out to be so successful, both in the enthusiasm of the narrators and in the support of alumnae groups around the country, that it was easy to generate additional funding from alumnae groups to continue the project. She changed her project design to continue as a phased project, loosely organized by alumnae graduation dates. So far, each phase completed generates enthusiasm and funding to continue to a next group of interviews.

While constructing the project design, it is important to establish the budget for project expenses. When building a budget, consider the following: technology purchases, overhead costs, interview expenses, processing rates, and preservation fees. Technology and preservation will be covered in later chapters, but basic technology that may be needed for a project include recording equipment (audio and video), microphones, batteries, recording media, recording platforms, external hard drives, preservation methods, and transcription software.

However, the budget should not only consider financial costs but also the cost of time. Will you hire an independent oral historian to conduct these interviews, or will you do the interviews yourself? Will you pay for help with transcription, or will you do it all yourself? A more in-depth discussion about transcription is in Chapter 4, “Managing Remote Projects,” but for now, let’s say the decision has been made to transcribe your interviews. The AI technology implemented in automated transcription programs continues to improve in accuracy, but these transcripts still require audit-checking and editing by a human, and, as discussed in Chapter 4, automated transcription may not always be the best approach. Either way, transcription can cost a lot in time, as it will take multiple hours to either clean up an automated transcript or transcribe from scratch.¹⁷ If you don’t have someone on your team to transcribe, hiring an outside professional is an option but will be costly. Which price are you able and willing to pay for your project?

Another element to consider when working through the budget for your project is the desired duration of the project. In an ideal situation, you would

be able to secure all of the funding for your project before the project begins. However, in some instances it is necessary to conduct interviews within an expedited time frame, such as interviewing individuals in poor health, preparing interviews for a public event, or completing a project within a grant cycle. On the other hand, maybe delivery of your equipment is delayed, the local archive you wanted to deposit your interviews with is short-staffed, or a narrator's availability conflicts with an interviewer's schedule. It is important to remain flexible and have the ability to adjust if needed. Allow yourself sufficient time to ensure that each oral history will be conducted, transcribed, and successfully deposited into a repository.

Lastly, be sure to include any costs for training in your budget. Whether you decide to enroll your entire team in an online workshop or create training manuals for interns and volunteers, be sure to include some sort of training or orientation in your budget. Several online oral history workshops are available for all levels of experience for those wanting to begin an oral history project, including BUIOH's "Getting Started with Oral History" e-workshop which is offered twice a year.¹⁸ Other trainings are offered, both nationally and internationally, in person and online, for durations of one day to a week long. Those interested in oral history have a variety of trainings to choose from, and completing training is recommended before beginning a project.

An old adage states, "How you start is how you'll finish." When it comes to your oral history project, it is imperative that you consider several different aspects of your project: what it will cover, who you will interview, what research needs to be done, what help you will have to do it, what you will do with these interviews afterward, and how you will transfer all materials to the archives. It is also important to factor in how doing oral history at a distance will affect communication and if the project is using the proper platforms or communication methods to effectively communicate with a team. Are you constructing any barriers by using a certain platform over another? Are you factoring in various time zones of team members when planning meetings or scheduling interviews? These things should be considered during the construction of your project design. A well-developed project design is the first step in planning a successful oral history project.

Hard Questions and FAQs

Dealing with Multiple Entities

When dealing with multiple organizations, departments, and institutions to complete an oral history project, it is imperative to clearly define roles and responsibilities at the outset. Each party involved must understand and agree to what is expected of them. For example, if an organization agrees to provide space for recording oral history interviews, the director of the oral

history project should develop a calendar of available times so that interviewers know when they can schedule interviews. A copy of the agreement, including the dates and times made accessible to the project and also information about the curators of the space, should be readily available. Then if any issues arise with the location, the team will have a document handy that outlines both the agreement made and who to talk to in order to resolve the misunderstanding.

Or, for example, if you have partnered with an institution that will allow you to use its unlimited Zoom account to conduct interviews, be sure to note the details of the agreement along with the account permissions granted. That way, if any problems occur with accessing the account or downloading interviews from the cloud, you have information you can point to on the permissions and use agreements. Or, if a local library loans you equipment, you want documentation showing what equipment you borrowed, the condition it was in when you checked it out, the terms of the borrowing period, and when the library expects you to return the items. By having this documentation on hand, it is clear to participants what is available for use and when to use it by.

Finding Narrators

Two of the most frequently asked questions I get when it comes to planning for oral history projects are these: How do I find people to interview? How do I get people to talk with me? This is especially true with remote interviews. However, several resources are at your disposal, such as alumni groups, clubs, societies related to the topic, and community centers. If you are able, go to where the people are (in person and virtually). See if there are any community events or meetings that you can attend. When going this route, make sure to reach out to the group ahead of time so they can put you on the agenda.

In addition, social media can be your friend! Many people can be located through Facebook group pages, individual Instagram accounts, or professional LinkedIn pages. If you decide to go through these channels and reach out to someone via instant message or direct message, be sure to have your elevator pitch—or key components from your project design—ready to share. Tell them who you are, the reason for reaching out, and a very brief synopsis of the project. Include your contact information, and invite them to contact you if interested. Once they respond, you can go more in depth about the project.

One last tip is to believe in the power of word of mouth. I remember being a new oral historian and librarian at the African American History Research Center in Houston. I was new to the city, new to the profession, and had not yet had the opportunity to build a reputable network. After reaching

out to many potential narrators, I landed my first handful of interviews. One common thing I would hear from my narrators is, “Have you talked to (fill in the blank with a name of someone who I was either unfamiliar with or was dying to connect with)? You should interview them. Here’s their information!”

Getting Community or Institutional Buy-In

Another frequently asked question pertains to getting community support and buy-in for an oral history project. I would like to caution those with this question from thinking it is an easy process. Depending on the community and on the historical treatment of the community, along with acknowledging the history of marginalized people’s stories being taken and profited upon, it will take some time to develop relationships with community members if you are not of said community. Your first action should be to try to develop relationships with the community, in general. Attend community events, determine who the community leaders are, and set up informal meetings with the leaders over coffee or a light meal. When discussing your project, use your project design! This gives people something tangible to read and share. When discussing the project, be sure to stress the importance of the project and how their voices and experiences can help. Hosting information sessions about your project could help increase participation. Also, clearly communicate what your planned or potential outcomes are going to be on this project—in other words, what you are doing with their stories. This will be discussed more in the next chapter, but be sure you are honoring the people and the stories of these communities. Do not simply use them for your research.

When trying to gain either community or institutional buy-in, you may have to conduct and publicize a few interviews to show how this project will work. Some people need to see what is being done before they will fully commit time, funds, resources, and their own voices to a project. By creating a sample of interviews, you can then encourage people to participate. Think of it as how grocery stores or ice cream shops allow customers to sample a dish or flavor. By tasting it and experiencing it for themselves, the customer can make an informed decision on whether they want to buy anything. But do understand that even if they take a sample, that does not guarantee they will make a purchase.

Conclusion

As stated before, the project design is the blueprint for your oral history project. Creating a plan for your oral history project is essential to its overall success. While constructing your project design, take time to think through and develop one that will help keep things on track, help ensure everyone

involved is fully informed, and help provide a strategic plan for roles and responsibilities. Incorporate each of the project design elements in your narrative, and have this easily accessible for your team and for potential narrators. In addition, make sure that the software, platforms, and tools you use for your project are ones that do not create hindrances or barriers for your team and participants. You want the process to be simple for those who are volunteering their time and resources for this project. Lastly, you want to ensure that you are offering clear and effective communication and providing informed consent, which we will explore more in the next chapter.

Notes

- 1 David Hartshorne, “What is a Project Plan and How to Write a Killer Plan in Six Steps,” *Monday* (blog), updated August 8, 2023, <https://monday.com/blog/project-management/how-to-write-a-killer-project-plan-in-6-simple-steps/>. Monday.com is a cloud-based-work operating system that can be used for project management, software development, operations, workflows, and more. This system is geared toward those doing remote work.
- 2 “What is a Blueprint?,” *EDUCBA*, updated May 26, 2023, www.educba.com/what-is-blueprint/.
- 3 Longqi Yang, David Holtz, Sonia Jaffe, Siddharth Suri, Shilpi Sinha, Jeffrey Weston, Connor Joyce, Neha Shah, Kevin Sherman, Brent Hecht, and Jaime Teevan, “The Effects of Remote Work on Collaboration among Information Workers,” *Nature Human Behavior* 6 (January 2022): 43–54, <https://doi.org/10.1038/s41562-021-01196-4>.
- 4 Valerie Raleigh Yow, *Recording Oral History: A Guide for the Humanities and Social Sciences*, 3rd ed. (Lanham, MD: Rowman & Littlefield, 2015), 77.
- 5 A Google search conducted on November 8, 2023, for “civil rights” produced around 2.67 billion (2,670,000,000) hits.
- 6 A Google search conducted on November 8, 2023, for “civil rights 1950s-1960s” yielded 25.1 million (25,100,000) hits, less than 1 percent of the search conducted for “civil rights.”
- 7 For those who are curious, the search term “civil rights 1950s and 1960s + protests + Waco, Texas” yielded a total of 1.8 million results (1,840,000), which is still a large amount but significantly less than the initial 2.67 billion. At this point it is up to the researcher to sort and prioritize the types of sources wanted for this project: newspaper articles, scholarly articles, videos, online exhibits, etc.
- 8 “Remote Interviewing Resources,” *Oral History Association*, published August 27, 2020, <https://oralhistory.org/remote-interviewing-resources/>.
- 9 Baylor University Institute for Oral History, “Oral History at a Distance” Webinar Survey, Spring 2022. The quantitative findings from the survey are included in the appendix, while the full survey results are available on this publication’s companion website, <https://library.web.baylor.edu/oralhistoryatadistance>.
- 10 In this chapter, the MOU is discussed as an agreement between parties; this document is typically used when organizations partner with one another for a project. Chapter 4, “Managing Remote Projects,” discusses contracts that a project can ask individual team members to sign. In the appendix is an example of an MOU that we use for our Community Oral History Grant, which we award to nonprofit organizations in the state of Texas who desire to document the history of their communities.
- 11 Nicole Saylor, “So You Want to Donate Your Documentary Collection to an Archives?,” *Library of Congress Blogs, Folklife Today: American Folklife Center*

- and *Veterans History Project*, January 4, 2018, <https://blogs.loc.gov/folklife/2018/01/so-you-want-to-donate-your-documentary-collection-to-an-archives/>.
- 12 Coordination Centre for Scientific University Collections in Germany, *Guidelines for Collections Policy and Mission Statement*, April 2017, https://wissenschaftliche-sammlungen.de/files/8214/9277/7962/HR_Guidelines-for-collections-policies-and-mission-statements_201704.pdf. Furthermore, the Society of American Archivists states that the “collecting policy is synonymous with *collection development policy*, *acquisition policy*, and *collection policy*, as well as other less common terms *collection development statement* and *documentation policy*. Archivists borrowed the idea from the library profession and developed it with much debate throughout the 1970s and 1980s.” Dictionary of Archives Terminology, <https://dictionary.archivists.org/entry/collecting-policy.html>.
 - 13 “Collections Policy Statements,” *Library of Congress* (Veterans Oral History Project), updated May 2022, www.loc.gov/acq/devpol/vet.pdf. Please note that collection policies can vary in length and depth, and this example is one of the more extensive versions.
 - 14 For a more in-depth list of things to consider when donating to an archive, see “Donating Your Personal or Family Records to a Repository,” Society of American Archivists, 2013, <https://www2.archivists.org/publications/brochures/donating-familyrecs>.
 - 15 Dan Fuller and Jean Greene, “The Utica Roots Oral History Project,” case study, Utica, MS. (Located in Section II.)
 - 16 The Radcliffe College Alumnae Oral History Project was begun by a committee of the Radcliffe Club of San Francisco in 2019. Its purpose is to record the oral histories of undergraduate experiences of Radcliffe College alumnae from the classes of the 1940s through the mid-1970s. The project uses volunteer alumnae as interviewers and archives the oral histories at the Schlesinger Library on the History of Women in America at Harvard University. More information about the project can be found on its webpage: “Radcliffe College Alumnae Oral History Project,” Radcliffe Club of San Francisco, www.radcliffeclubsf.org/radcliffe-college-alumnae-oral-history-project.html.
 - 17 Many reputable sources, transcription websites, and oral history guides note that it takes about four hours to transcribe one hour of audio from an oral history interview. Other sources quote one hour for fifteen minutes of audio, still making the ratio four to one.
 - 18 More information about the BUJOH “Getting Started with Oral History” e-workshop can be found at <https://library.web.baylor.edu/oralhistory>.

3

ETHICAL CONSIDERATIONS FOR REMOTE PROJECTS

Adrienne A. Cain Darough

“Number one, do no harm.” Although versions of this statement are often seen in medical and archival practices, this rule is the first bullet point of the American Anthropological Association’s Statement on Ethics (2012). The statement continues:

A primary ethical obligation shared by anthropologists is to do no harm. It is imperative that, before any anthropological work be undertaken . . . each researcher thinks through the possible ways that the research might cause harm. Among the most serious harms that anthropologists should seek to avoid are harm to dignity and to bodily and material well-being, especially when research is conducted among vulnerable populations.¹

I will argue that oral history is no different.

The practice of oral history has always been grounded in ethics. In fact, every step of the life cycle has ethical components: designing the project; selecting narrators; doing background research; conducting the interview; including the narrator in decisions; and practicing responsible archiving, access, and use. According to the US National Park Service’s manual, the ethical considerations fall into two categories:

One is the ethical concern for the interview process—methodology. The second is a concern for the person—rights, privacy, and dignity of the interviewee. . . . The ethical concern for the person being interviewed should always outweigh concern for the interview process.²

The COVID-19 pandemic forced oral historians to rethink every step of their work, in particular the close, personal relationship with the narrator which oral historians hold dear. Though remote interviews are hardly new, until now they have been viewed as a last resort. Now oral historians undertaking these quasi-familiar methods of remote interviewing are raising questions as they scramble to accommodate the situation, ensuring the narrator is comfortable while conducting meaningful interviews as they are rapidly adjusting, in real time, in an effort to understand unfamiliar technology. What if the internet connection is interrupted or fails? What can I do from a distance to ensure the narrator is comfortable with the interview process? How can I guarantee the narrator's interview space is quiet and secure?

This chapter will address ethical issues that arise in doing oral history, through the lens of a world where distance interviewing is becoming as common as in-person interviewing.

Your Best Resource—OHA's Principles and Best Practices

The Oral History Association's Principles and Best Practices suite has served as the foundation for ethical standards for practitioners far beyond the US-based constituency it represents. The sets of documents and writings guide oral historians through several tips and considerations with the goal of creating an ethical road map for practicing oral historians. It would also be helpful to view the OHA's Remote Interviewing Resources document with careful attention to "Considerations for Choosing an In-Person vs. Remote Interview."³

In addition to the OHA, other oral history societies and associations worldwide have an ethical component or statement that governs their behavior and practices. The aforementioned American Anthropological Association (AAA) expounds on the notion of "do no harm," especially if it causes harm to dignity and to bodily and material well-being with vulnerable populations. Additionally, the AAA's statement includes being open and honest regarding one's work, obtaining informed consent, and more.⁴ For the Oral History Association of South Africa, the first rule stated in their code of ethics is that oral historians planning an oral history project should consider "any possible harm that the interview process may cause to the interviewee's reputation or his/her community."⁵ It is apparent that the main concern of these organizations and societies is the care and protection of the people who are sharing their stories with us. It is imperative that these rules are followed to ensure that these participants are protected, whether interviews are conducted in remote or in-person environments.

Ethical Responsibilities to the Institution Sponsoring the Project

When creating and conducting an oral history project at a distance, it is very important to know the rules, procedures, and rights regarding the research you are conducting not only in your region but within the regions you are working in while conducting your project. Steven High, cofounder of the Centre for Oral History and Digital Storytelling at Concordia University in Canada, reflects on his own journey in conducting a transnational oral history project:

One of the challenges we face in undertaking transnational research is that there are very different ethics regimes in place from one country to the next. Oral historians must go through institutional review boards in Canada and the United Kingdom, while they are now (mainly) exempted in the United States. There are no ethics regimes in Italy, France, or Germany. Yet, because the funding is coming from Canada, we need to follow—as a project—the Canadian rules. How to do so? Luckily, oral history is a global community of practice with a shared ethos and methodology. There is therefore substantial agreement across our project team, and we have agreed to follow a single ethics framework, now approved at the home institution of Concordia in Montreal. Interviewers will need to complete a remote oral history workshop to ensure we are all on the same page. Our team has already grown to more than seventy researchers.⁶

Informed Consent in Distance Oral History

According to the OHA, informed consent is defined as an “agreement that documents, verbally or in writing, that the narrator has been given all the information necessary to come to a decision about whether to participate in the oral history project.” The purpose of informed consent is to make sure participants know everything they need to know about the project, including potential outcomes for the materials they are giving you, in order to make an educated decision about their participation.⁷

It is important that you and your participants know the rights of your narrators for your oral history project. Overall, narrator rights include the right to do the following: ask and receive answers to questions about the project and procedures, refuse to answer certain questions or discuss certain topics, review and edit transcripts, withdraw from the project at any time, and restrict use or access to their interviews.⁸

Before you start to panic about narrators opting to withdraw, I will say that the few times I have seen someone withdraw from a project, it was typically due to a lack of informed consent, meaning that something happened that they were not fully or correctly informed about that, in turn, made them

uncomfortable. I often advise people that the last thing you would want is for your narrator to be home on a Sunday watching PBS and see their life story in a documentary that they were not aware of. Once again, informed consent is truly important for you and your narrator. One of the ways this discussion can be facilitated and navigated is through the pre-interview process.

Getting to Know You: Ethics in the Pre-Interview

The pre-interview process can be viewed as the practice round or warm-up for the actual interview. It is also a great opportunity to strengthen trust and build rapport with the narrator. The interview should not be the first time the narrator sees your face or hears your voice. The pre-interview will be discussed in several chapters throughout this book, but it is important to discuss it here from an ethical standpoint. In a distance setting, the pre-interview takes on an additional role of getting acquainted with the narrator while ensuring they are comfortable with the interview process and the remote interview setting.

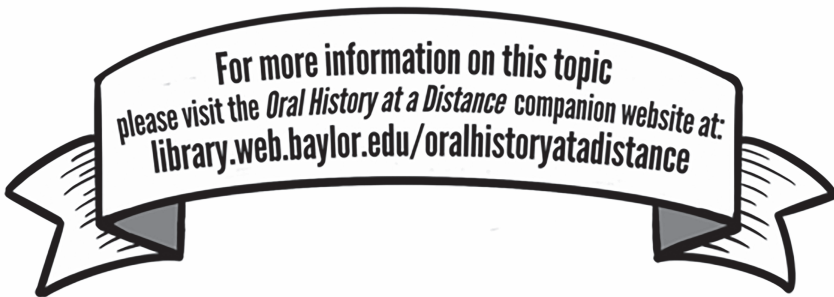
The pre-interview process is important for many reasons. It allows the interviewer the opportunity to go over the process of the interview: the topics to be discussed, estimated time frame, and follow-up steps. It is also a good time to review the project design (have an accessible copy ready to share), to go over any release or deed-of-gift forms that will require their signature, and to make sure the narrator understands their role as a participant in the project. During the pre-interview, be sure to give the narrator space to ask about the project and their role as a participant.

Pre-Interview in a Remote Setting

In remote interview scenarios, it would be highly beneficial to conduct the pre-interview in the same setting as the actual interview. The pre-interview is traditionally not recorded, but I would like to provide an argument for recording it in a remote setting. There are already so many things to be aware of during a remote interview, such as, Is the connection stable? Is the audio and video quality clear? Is the narrator comfortable with a potentially new medium? Because of this, taking notes can seem a little daunting. By recording a virtual pre-interview, you can focus more on building rapport and engaging in the conversation and then revisit the recording later to see if you may have missed anything in your notetaking. The pre-interview should only be recorded with the narrator's consent, and it should be explained and understood that this recorded pre-interview is not meant to be archived or live alongside the oral history interview, just as it would not be for an in-person interview. The recording simply serves as a means to an end and allows for the opportunity to truly connect with your narrator.

Another reason to conduct the pre-interview in the same method as the interview is because it will allow the interviewer to “scope out the territory” to address any distracting sounds, technology issues, or personal items that could impede the quality of the recording. When conducting a remote interview that involves a video-recording component, make sure to observe the background. Are medication bottles on a nearby table? Is a pile of laundry in the corner? Is a bra hanging on the back of the doorknob? Is a toddler running around sporting only a diaper? Does a cat keep trying to lick your virtual face? (Yes, I have seen all of these happen.) For phone interviews, do you notice any sounds in the background? Echoes? Barking dogs or loud traffic? Although we cannot control all the elements that may appear in a remote interview, we can take note of a few things to ensure a good-quality recording and great representation of our narrators. We’ll dive more into representation a little later.

In addition, the pre-interview is another opportunity to provide informed consent. It is a great time to talk about the topics to be discussed and the equipment being used and to give a walk-through of the platforms that you will use to conduct these interviews. Troy Reeves, head of the University of Wisconsin–Madison Oral History Program, notes in his case study when describing interviews during the pandemic, “We conducted a pre-interview with all our narrators and explained to them how we would record their oral history, why we chose that platform, and what would be expected from them.”⁹



More on Informed Consent—Managing Expectations

“Never make a promise you can’t keep.” You may have heard this quote, or a similar version of it, at some point in your life. This saying has been used in several pop and R&B songs, typically as a warning in (mostly romantic) relationships and stated in regard to keeping the trust or happiness of a partner—and often dives into the consequences of not doing so. This quote also applies to the relationships within your oral history project. What happens when you

make a promise to your narrator or oral history funder and then break that promise? How does that affect their trust in you and your project?

I am an advocate for managing expectations from the outset. If I conduct a four-hour interview today, I am not promising my narrator a fully edited transcript tomorrow. However, I cannot blame narrators for thinking this is possible. Many oral history-adjacent avenues such as podcasts, YouTube videos, and documentaries have exploded due to the accessibility of technology and the ease of creating media with cell phones. Many people now are seeking oral history as a popular, trendy way to tell and share stories. When communicating with your narrators, clients, or partner organizations, be sure to be honest and clear about what you can and cannot do.

“I Was Watching a Documentary on PBS and Thought You Could Recreate That”

Late spring 2022, a local veteran contacted me about wanting to interview a distinct group of people who could contribute stories about the history of aviation, their service branch, and their veteran experiences. He wanted to capture these stories in person during their reunion weekend in a local convention center since the majority of participants were not living in or near Waco, Texas. He emailed me this information:

I am a retired USAF aviator, and I'm hoping to get some assistance for an important upcoming event. On the weekend of May 20, 2022, I will be hosting a reunion of the 522nd Fighter Squadron at the Waco Convention Center. Though the squadron has a long history to include various aircraft, the particular period of time for attendees committed to attending the event is between 1969 and 1993, when the squadron was flying the F-111.

The gathering gives us a unique opportunity to do something special which we've never done. (More than sixty ex-aviators will be attending, plus wives and guests.) That is, capturing stories on audio/video. It's particularly unique in that the F-111 was a two-place airplane and many crews will be rejoining, making the sharing of stories even more interesting from their somewhat differing roles (pilot/weapon systems operator). Making this even more urgent is the fact that we are aging aviators and have already lost many of our comrades.

I have no experience or skills, not to mention equipment, in recording these stories. As a matter of fact, it appears that none of us who are attending the event possess any of that. (I have asked!) I am therefore reaching out for assistance. If this is something your department might be able to assist with, perhaps even as a student project, please contact me.¹⁰

Sounds like a great opportunity, right? As the daughter of a US Air Force veteran who served as an aircraft mechanic and worked on planes just like this, I found this to be an interesting and exciting opportunity. However, I was aware that when I get requests like this, my role often involves tempering expectations. I knew that I needed to obtain more information and articulate what we can and cannot do here at Baylor University Institute for Oral History (BUIOH).

Again, with the rise of oral history byproducts, people often believe that oral history is a quick and easy process. In later chapters will be discussions about processing and the time it takes to do so. In my role as oral historian, project director, and planner, I must explain what our process is, what is feasible, the time it takes, and the output I can deliver. Here are some of the phrases and statistics I keep in my back pocket to illustrate:

- Oral history interview recordings are typically one to two hours long. Unfortunately, we are unable to conduct sixty-plus oral histories in one day. However, we can capture a few shorter stories that day and reach out to conduct remote interviews (with out-of-town participants) once the reunion is over.
- I cannot create a fully edited documentary covering the stories shared during that weekend, but I can provide the raw files that can be edited by a professional videographer who can help meet your needs and expectations.
- Unfortunately, I do not have the ability to provide a fully edited transcript tomorrow. Transcribing is a time-consuming process with an average time being four hours to transcribe one recorded hour, and it takes longer if the recording is poor quality, the speaker is hard to understand, or a lot of unfamiliar words are used. If this is something you need immediately, I can refer you to professional transcription services or suggest an automated transcription program that may be able to help you with this.

After many conversations, I was able to provide the veteran with these feasible options: “How about we have the participants share a story or two about their experiences with the aircraft in person, and then we can follow up with remote interviews later? This way we can capture these important stories but leave room for a more thorough interview after the reunion.” The veteran replied, “I never considered that. That’s a great idea!”

Please understand I am not mocking the veteran for this. I simply need to portray that when it comes to oral history, the tasks involved can be very different and are often misunderstood, hence the importance of informed consent. This is an opportunity to teach and share how oral history works. Through this education and understanding, I can set both of us up for success by sharing what oral history is and is not, and also what I can or cannot do to make this project happen. By doing so, I am tempering expectations and working with the client toward a viable solution.

Following Up

Whenever I have a conversation, whether in person or remotely, with a potential narrator or person with an idea for an oral history project, I follow up with an email that wraps up our conversation. Not only does this provide a recap of what we discussed, but it also allows an opportunity to make sure that we are on the same page and to correct any misunderstandings. Here is an excerpt of a follow-up note sent after my in-person meeting with the veteran:

It was really nice to officially meet you and talk with you today. As promised, here's a recap of our meeting:

- Recruit volunteers for interviewing. Once confirmed, I can provide equipment and interview training.
- Let's set a priority interviewee list and prioritize speaking with those people at the meeting.
- We agreed to do short segments (~fifty minutes) on location and allow that to lead to more in-depth interviews in the future (that can be conducted virtually from our studio).
- I will reach out to the Air Force ROTC here at Baylor to see if we are able to recruit students to help out (manning equipment, etc.) and let them sit in on the interviews.
- I'll see if there is an additional video camera (or two) I can check out from the library.
- Secure recording space either at the Courtyard hotel or Waco Convention Center.

Please let me know if I have left out anything or misunderstood anything listed. I look forward to working with you on this project!¹¹

In the email, I provided a recap of our conversation, listed out the expectations and tasks assigned to each person, and provided an opportunity for him to correct or add anything to the list that I may have misunderstood or omitted. This way, we would be on the same page and have a mutual understanding.

Representation

Have you ever seen a salacious headline or watched an incriminating sound bite that depicted a person in a less-than-favorable light? Did you ever go to the original source and see that what was shared was *not* the entire story? Or wasn't even remotely true? Clickbait!

Oral history is not a clickbait type of methodology. As noted in OHA's Principles and Best Practices:

Oral history is distinguished from other forms of interviews by its content and extent. Oral history interviews seek an in-depth account of personal

experience and reflections, with sufficient time allowed for the narrators to give their story the fullness they desire. The content of oral history interviews is grounded in reflections on the past as opposed to commentary on purely contemporary events.¹²

Per this definition, it is possible to conduct ethical remote oral histories. However, remote situations pose certain nuances and considerations that must be addressed in order to meet this goal.

It is important for our narrators to be correctly represented throughout the entire project. One word of advice that I share with beginning oral historians is that when going into the interview, let go of any preconceived notions, stereotypes, or “known” truths or beliefs about the topic. Allow your narrator to share *their* perspective, *their* experience, *their* story. It’s about them, not you. Yes, you have done a great deal of planning and research to get to this point, but this is not a time to show off what you know. Remain open-minded. Their responses may align with your thoughts and assumptions, or they may contradict what you believed. Remember, it is about them and their experiences, not your beliefs.

In addition, knowing you are being recorded can present a false need or pressure to put your best foot forward or present yourself in an acceptable way. There is nothing wrong with wanting to look one’s best by dressing nicely or getting fixed up for a video interview. However, it is an entirely different thing to try to hide one’s accent. Encourage the narrator to be themselves, speak as they would naturally speak, and show up as themselves—not who they think you want them to show up as. It may be much more difficult to do this with remote video interviews since the narrator and interviewer both have an instant live feed of themselves right in front of them on their screens, which has been noted to cause individuals to become more critical of their actions and appearance.¹³

Something else to consider regarding remote video interviewing is the concept of Zoom anxiety, which deals with the anxious anticipation of unexpected moments and the worry over the inability to control them. During the COVID-19 pandemic, we saw many entertaining videos of cats jumping on keyboards mid-meeting and a commercial where a father tries to keep his composure while his children run amuck in his office during a business pitch. Many of us have experienced speaking up to contribute a great idea in a meeting only to hear those now-infamous words: “Your microphone is muted.” According to PsychCentral, Zoom anxiety often overlaps with Zoom fatigue—a strong sense of post-meeting exhaustion—and can make participants feel nervous, uneasy, forgetful, and stressed.¹⁴ Although these statistics deal more with group meetings than one-on-one interviews, take into consideration how these could affect your narrator. Think about what it would be like to share your life story with someone, to have someone ask

detailed questions about a moment in your life that you may have not thought about for years—decades even—or intentionally forgot. Think about how it would feel to discuss a friend or family member who is no longer here, your favorite spot to hang out as a teenager that no longer exists, or a neighborhood that you grew up in that has been significantly altered due to gentrification or urban development. What feelings do you think would surface?

In wanting to make sure our narrators are correctly represented and to provide clarity for future listeners, it is important to follow up and clarify any unfamiliar statements or terms. For example, I come from a family of five—my mother, father, two older sisters, and myself—and three of us served in the military. As mentioned before, my father served in the US Air Force, while my sisters served (and my brother-in-law is still serving) in the US Army. Often when we are all gathered, having a discussion, a slew of acronyms will come out of nowhere, along with names of different military bases (which they know the exact location of while I may not even know the state), procedures, uniform pieces—all a common language and shared experience for them. Sometimes I can follow along, and sometimes I must remind them that nonmilitary-affiliated folks are in the room, and then they backtrack and explain to me what this term means or the significance of this place, etc. Think of this in terms of your narrator and project. If phrases, terms, or places are mentioned that you as an interviewer are unaware of, do yourself and your project a service by asking follow-up questions for more details for the sake of clarity. Keep in mind that if you as the interviewer are unclear about what is being said, it may be confusing to the future listener or researcher as well. It is better to have too much explanation than misunderstanding in the interview.

Asking follow-up questions can be difficult remotely because the physical distance hinders the ability to read body language and visual cues. For example, during a phone interview it can be difficult to avoid talking over your narrator or interjecting too early. Even with remote platforms that allow for video, a lag is present that can inhibit the ability to connect, relate, or react instantaneously. Several examples of remote interviews have been shown on television that feature two or more people talking over one another due to the inability to hear each other or pick up on certain cues or perhaps due to a delay in their internet services, which in turn causes a jumbled mumbled mess of words. Not to say that this does not happen within in-person interviews, but it is more of a problem with remote interviews. One way to possibly alleviate this issue is to acknowledge the lag with your narrators and express your desire to avoid interrupting them. It may be very useful to allot a few seconds in between your narrator's answer and your next question to try to avoid talking over them. It can be difficult to know when your narrator is done with a particular point, especially if conducting an interview using a method in which you cannot see them, such as the telephone or an audio-only platform.

Another method of ensuring correct narrator representation is allowing the narrator to review their transcript and audio, which is included in the list of narrator rights, to make sure that what is conveyed is what was intended. At BUIOH, we use the cloud-based storage system Box to send audio, video, or text files to our narrators for review, whether the interview was conducted in person or remotely. It also provides an opportunity for the narrator to correct anything that may have been misspoken. For example, in one interview that I conducted with a local pastor, he spoke of the difficulties and harsh treatment of gay men during the AIDS epidemic of the 1980s and 1990s in New Orleans. He named a dear friend of his from the clergy who had passed away due to complications from AIDS, and he talked about the neglect of care this friend received from health-care professionals. After allowing the narrator to review his transcript, he contacted me in a panic: he had mixed up the name of his friend with someone else. The gentleman he *did* name, also a friend, was very much alive and well. The pastor joked, “I can’t believe I killed him off!” We both laughed, and I assured him we would get it corrected, but he was relieved and grateful that he had the chance to review his interview before we made it available to the public.

Preserving Interviews for Future Use

An additional ethical consideration is to determine the ways these interviews can and/or will be used in the future and how to best create and preserve them for future use. Begin by creating the best recording possible. This includes making sure the recording is clear, in a preservation format, and accompanied by appropriate research notes.¹⁵ In addition to keeping and obtaining complete records about the project (e.g., the project design), be sure to include the research conducted for the project and any information pertaining to the narrators. This information will be extremely helpful to future researchers and the selected archives.

By gathering this information, you will be the favorite person of the future curator, librarian, or archivist who will preserve your materials. Trust me—I am a librarian and archivist, and nothing warms my heart more than to have a project donated that contains not just the recordings but also signed release forms as well as notes and background information about the project. It also ensures that enough information is presented to avoid the project being misrepresented.

Speaking about archives, this should also be a part of your long-range outlook. A plan should be in place to preserve your project to ensure it is available for future generations. As mentioned in Chapter 2, “Project Design,” the archive that will house and preserve your project should be one that aligns with your project as well. For example, if I create a project based on oral

history interviews with veterans of the Vietnam War who reside in Texas, one place I may consider as a permanent home is the Vietnam Center and Sam Johnson Vietnam Archive at Texas Tech University because (1) the topic of the project and the mission of the archive align with one another; (2) it is an established and well-respected archive; (3) the archive has dedicated people tasked with the preservation of these materials; and (4) the archive is accessible in person and online.

What if archiving is not the best plan? As I briefly mentioned in Chapter 2, you may be in a situation where archiving may not be the best option for now. I once attended a conference focused on archiving materials and stories of under-documented populations, and the idea of not archiving came up. At first I gasped and thought, What do you mean *not* archiving!? But when I thought about it, it made sense. Consider this: What if no archive exists that can properly care for my project? What if the subject matter is so sensitive that it does not feel safe housing it elsewhere? What if this project will not receive the care and attention it deserves and will only sit on the shelf? What if the archives do not make the project accessible? How does that serve this project and the narrators in the long run? Ultimately, it is a judgment call for the oral historian, interviewer, and archive.

Although the archivist in me was flipping out, I thought more about what would be best: to archive a project somewhere that is not a good fit, does not have the resources to care for it, and/or does not align with my project goals or mission; or to keep the interviews and materials in my own possession, making sure that I create multiple copies for safekeeping. This is especially true for projects that focus on stories from minorities or underrepresented groups who have historically been taken advantage of, misrepresented, and taken from in the name of research only to see their belongings and stories whisked away or inappropriately interpreted.

Access and Ethics

An additional concern for oral historians deals with access to the interviews that we create and curate. Access is often a task that is left up to the librarian or archivist who maintains the materials, but it is important for oral historians to think about what access means and how it can affect the people we interview for our work. This is something that should be considered at all stages of the oral history process. In this excerpt from the case study provided by Steven High with the Centre for Oral History and Digital Storytelling, High shares his experience on these matters:

Ethics is often equated only with the interview in oral history projects. But we quickly learned that stories were being shared in all kinds of project spaces, such as in post-performance discussions, digital stories, our

biweekly live radio program, or our regular meetings. What do consent, mitigation of harm, and withdrawal mean in these *other* spaces? Ethics is often predicated on the idea that in one corner we have the researchers and in the other the researched, and we are going to regulate that space in between. But with true collaboration comes blurred boundaries. What is even on or off the record?¹⁶

It is important to consider ethics when it comes to how researchers and listeners will encounter these oral histories and stories. A popular method—and arguably one of the easiest methods—of sharing oral histories is to make them available online. Just because this method is popular, do not assume that your narrator is okay with you posting their interview on YouTube or another virtual visual platform. It is a popular avenue for video and audio sharing; however, that may not be the best or safest option when it comes to your project and your narrators. Consider what the ramifications would be if this interview could be accessed by anyone. Could your narrators or others named be put in danger? Is subject matter discussed that is sensitive or not suitable for all audiences? If so, decide on a way to work around this. One option is to restrict the use of the interview with a statement such as, “This interview will not be accessible via the internet.” Or you may offer an option to redact a section and not upload the full interview per the narrator’s consent. Or a website or online portal could include a pop-up waiver that announces this interview contains sensitive material that may not be suitable for certain audiences. These are just a few examples of how to protect access to interviews that contain sensitive materials.

Legal Release Forms—Protecting Your Project and Participants at a Distance

A legal release form—also known as a deed of gift, permission form, or donor agreement form—is a document that dictates the rules and uses for the interviews that are conducted for the project. This section will cover the basics of legal release forms, their importance, the ethics within these agreements, along with a few examples that can be found in the appendix.

In the ongoing spirit of informed consent, the release form should clearly communicate the expectations of the narrator signing the form. It should not be a rushed experience but something that is read, reviewed, and understood before signing. In addition to narrators, the interviewers who will be conducting the interviews need to sign a release form, unless it is understood as a work-made-for-hire situation.¹⁷

The best release forms are written in simple, straightforward, inclusive language so that those who sign it have a clear understanding of what they are signing and agreeing to. Although legal release forms may vary depending upon the project or institution, they all should include the same basic elements: the donor agreement, copyright transfer, and future use statement. There are several examples that you can draw direction from, including BUIOH's release form in the appendix.

Please note that if you are an employee of an institution, university, archive, or library, there may be a version of a release form that you are required to use or language already available to help you craft one. Since this era of remote interviewing may be new to some, now may be a good time to review the forms already in use to check the following: Is language used that is prohibitive or exclusionary? Is the form easy to understand? Can it be easily translated to another language if needed? Does it include various formats (audio and video)? Are any language uses or processes outdated? For example, while I was reviewing and updating the release forms at BUIOH, I found that the internet was still referred to as the *World Wide Web* in some places. Although it is still applicable, that term is rarely used anymore to describe the internet.

With any legal release form, it would be helpful for it to begin with language that discusses the purpose of the project. This wording can come directly from your project design and is another measure to ensure that you are providing informed consent to your narrator.

As previously mentioned, release forms should contain the following elements:

- the donor agreement, which is a statement that shows the nature of the agreement made between the donor (narrator) and the project director, project, institution, organization, etc. (i.e., you), which could be as simple as “I, Adrienne Cain, give this oral history to the Smithsonian Institution”;
- the copyright transfer, which is a statement in which copyright is transferred from the narrator to the project director, project, institution, organization, etc. (again, you);
- and a future use statement which lists all known and potential uses of the interview in the future.

Examples of when you might need a future use statement are if you know the alumni interviews you collect will be used to create promotional materials for your university's alumni association, or if the interviews you gather from community members will be used as classroom learning material for your seventh-grade local history course. If one of these were the case, make sure that information is included in the language and that your narrators are aware.

A Quick Note on Copyright

What is copyright, and why is it important? Why ask for copyright? Copyright covers certain privileges that are needed to process an oral history interview or project. The first is the right to reproduce. As you may know, or will learn in the following chapters, one of the first actions to take after conducting an oral history is to make copies, or reproduce the interview, and then put these copies in various places to ensure safekeeping in case anything happens to the original. Next is the right to prepare a derivative work. In the case of an oral history, the most common example of a derivative work would be the transcript. It also includes the rights to distribute copies, perform publicly, and display publicly—all of which are important if you plan to share these interviews with the public, create online or in-person exhibits, or even create songs or plays based on the interviews you conduct.¹⁸

A QUICK NOTE ON COPYRIGHT

As we enter this brief discussion on copyright, I want to include a disclaimer: the following information is based on laws and copyright acts in the United States. Please become familiar with the rules and regulations of copyright in your respective areas.

When it's explained, it doesn't seem as nerve-racking, does it? This is why it is helpful to spell this out for your narrator rather than just stating "transfer of copyright." We are in an age where ownership of your words, photographic images, and content creation is of high interest, so make it easy for your narrator to understand what is being asked for and why. Also know that your legal release form is reflective of the agreement between you and your narrator. This may include a series of negotiations or restrictions agreed upon. For example, a narrator shares their discomfort with their interview being on YouTube, so you make an agreement that it will not be uploaded to that platform. That should be noted in your legal release form. This form should establish the rules and parameters of the use of the interviews in your project and, as previously mentioned, some that are discussed with your potential narrators from the outset.

You should be willing, able, and available to answer any questions that your narrators or interviewers may have as they are presented with the legal release form, and your project design can help with this. In addition,

your release forms should be easily accessible and in a format that is easily shareable but not able to be manipulated, such as the commonly used PDF format.

How Should I Go About Getting a Signed Form in a Remote Setting?

Several options exist to acquire a signed release for remote interviews. One option is to email a digital copy of the release form to the narrator and ask them to print and sign the form, scan or photograph it, and then email or text it to you. They could also return it to you via snail mail. Software programs such as Adobe Acrobat allow users to create an electronic signature, or you can also use internet-based signature systems such as DocuSign, which is free, that allow a secure delivery and signature. Or you can send the form the old-fashioned way, by snail mail. The narrator signs it and can scan the form or take a photo and send that, or they can send the original back by mail. No matter the method, it is imperative to have a release form signed by your narrator. This form gives you permission to proceed with your project and is essential for transcribing, preserving, and making your project interviews accessible to future viewers and listeners.

Hard Questions and FAQs

When Do I Present the Release Form to the Narrator? Before or After the Interview?

There are arguments for both scenarios. Some oral historians and interviewers prefer to get it signed at the beginning of the interview to ensure that it is done and not forgotten, while others feel it is preemptive to sign beforehand because the interview has not taken place yet. In my opinion, it honestly does not matter when, as long as a signed agreement form is obtained. No matter when you decide to present the form, it is a best practice to make sure that the narrator is told during the pre-interview that they will need to sign a form for permission to record the interview. It is not ethical to unknowingly spring a release form onto an unsuspecting narrator.

What If My Narrator Wants to Drop Out of the Project?

According to the list of narrator rights, narrators have the right to withdraw from a project at any time. If you find yourself in a situation in which one of your narrators wants to withdraw from the project, first, have a conversation about why. Determine whether or not the reason can be alleviated with a restriction or by redacting a portion of the interview. At the end of the day, you must follow the wishes of the narrator.

In the rare instance that this does occur, it is almost guaranteed that the reason is due to something happening that the narrator was not aware of. Lack of communication and transparency can create an atmosphere of distrust between the narrator and project partners. I cannot stress enough the importance of informed consent for your narrators and project participants.

Should I Get a Release Form for a Family Oral History?

Although family oral histories can seem like a simple sit-down with family members to gather stories, I strongly suggest that you get a release form that grants permission for you to record them for this project. You may decide to donate the interviews to a local genealogy library or similar institution for future preservation, and no archive will accept this collection of interviews without release forms. In addition, it is not uncommon for family belongings to be fought over once someone passes, with arguments over who has the “right” to have this or that. To protect your project and your family’s legacy, it would be best to get release forms from them, even if it is “just a family project.”

What Do I Do If My Project Narrators Are Uncomfortable with a Traditional Release Form?

In some instances, the issue of copyright ownership may arise. A narrator may be concerned about giving ownership of their stories to a project, or there may be an issue with giving ownership to an archive or institution that may not necessarily reflect the heart of the project. One solution is a Creative Commons license. According to “Who Owns Oral History? A Creative Commons Solution,” authored by Jack Dougherty and Candace Simpson, Creative Commons is a “licensing tool developed by the open-access movement to protect copyright while increasing public distribution.”¹⁹ Furthermore, the OHA states, “These irrevocable licenses are used to define how the narrator, as the copyright holder, would like the general public, rather than a specific party, to be able to make use of their oral history materials.”²⁰ Creative Commons licenses offer a great deal of flexibility, as they allow for open access to oral history interviews but put copyright in the hands of the narrator.²¹

I Understand That Oral History Is Exempt from IRB Review, But My Institution/Research Department Still Requires It. Which Route Should I Go?

Some disciplines are subjected to IRB review. What is IRB? It stands for Institutional Review Board, which is a board of individuals who are responsible for ensuring the safety of human subjects in projects that involve people as

research subjects. Since oral history deals with human beings, it was once classified as a method of research that requires review. Luckily, oral history—along with journalism, biography, literary criticism, legal research, and historical scholarship—is now exempt from IRB review.²² However, I strongly caution you to check with your institution—whether you are faculty, staff, or a student—to make sure that is the case for your location. If your institution or research department is telling you that you still have to go through the IRB process, I strongly encourage you to follow their direction. You can offer to point them to the direct clause of exemption, but at the end of the day, listen to them.

Conclusion

Although methods for conducting our interviews have pivoted and expanded, we as oral historians and practitioners are still held to a high ethical standard when it comes to practicing oral history. Not only are we concerned with our projects and research, but we should also be concerned about our narrators and their well-being. Be mindful of what this process means for your narrators: the vulnerability, exposure, and potential implications it may bring. We have a responsibility to protect our narrators and to make sure they are fully informed about what their role is, what the project aims to do, what will happen to their interviews, and any potential outcomes involving their interviews in the future. It is also important to understand how each element of your oral history project is impacted in a remote setting—from planning, to understanding ethics, to managing your project.

Notes

- 1 “AAA Ethics Blog: Principles of Professional Responsibility,” *American Anthropological Association*, amended November 1, 2012, <http://ethics.americananthro.org/category/statement/>.
- 2 “Oral History,” *US National Park Service*, updated August 13, 2021, www.nps.gov/subjects/oralhistory/index.htm.
- 3 “Considerations for Choosing an In-Person vs. Remote Interview,” in “Remote Interviewing Resources,” *Oral History Association*, published August 27, 2020, <https://oralhistory.org/remote-interviewing-resources/#1-considerations-for-choosing-an-in-person-vs-remote-interview>.
- 4 “AAA Ethics Blog.”
- 5 “Outline of a Code of Ethics for Oral History Practitioners in South Africa,” *Oral History Association of South Africa*, www.concernedhistorians.org/content_files/file/et/81.pdf.
- 6 Steven High, “Bridging Distance in Project-Based Research: The Cases of ‘Montreal Life Stories’ and ‘Deindustrialization and the Politics of Our Time,’” case study, Montreal, Quebec, Canada. (Located in Section II.)
- 7 The full definition provided on the Oral History Association’s website states, “An agreement that documents, verbally or in writing, that the narrator has been given

all the information necessary to come to a decision about whether to participate in the oral history project. Informed consent does not cover or deal with copyright. The interview process must be transparent, with ongoing participation, consent, engagement, and open discussion among all parties, from the first encounter between interviewer and narrator to the creation of end products. Informed consent plays a key role in ensuring transparency.” OHA Glossary, <https://oralhistory.org/informed-consent/>.

- 8 This listing of narrator rights is drafted from John Neuenschwander’s *A Guide to Oral History and the Law*, but these basic principles can be found within the Oral History Association’s “Principles and Best Practices” (<https://oralhistory.org/principles-and-best-practices-revised-2018/>), Oral History Australia’s “Guidelines for Ethical Practice in Oral History” (<https://oralhistoryaustralia.org.au/guide-ethical-practice/>), and the draft of the Oral History Association of South Africa’s “Outline of a Code of Ethics for Oral History Practitioners in South Africa” (www.concernedhistorians.org/content_files/file/et/81.pdf). Each of these statements and guidelines contains similar basic principles outlining the rights of narrators and interviewers in the oral history process.
- 9 Troy Reeves, “Moving Past ‘Analog’ Remote Recording: Total Recorder, Their Story, and the UW–Madison (Wisconsin) Oral History Program,” case study, Madison, WI. (Located in Section II.)
- 10 Local veteran, email message to author, March 28, 2022.
- 11 Adrienne A. Cain Darough, email message to local veteran, April 12, 2022.
- 12 “OHA Principles and Best Practices,” adopted October 2018, Oral History Association, <https://oralhistory.org/principles-and-best-practices-revised-2018/>.
- 13 Shira Feder, “A Cyberpsychologist Explains Why You Can’t Stop Staring at Yourself on Zoom Calls (and Everyone Else is Probably Doing the Same),” *Insider*, May 3, 2020, www.insider.com/why-you-stare-at-yourself-zoom-calls-psychologist-2020-4.
- 14 Claudia Rodriguez and Courtney Telloian, medically reviewed by Jacquelyn Johnson, “Zoom Anxiety is More Common than You Think: Here’s Why,” *Psych Central*, June 25, 2021, <https://psychcentral.com/anxiety/zoom-anxiety-is-more-common-than-you-think-heres-why#what-it-is>.
- 15 See Chapter 6, “Remote Recording Technology,” for a more detailed discussion on recording formats and other technical aspects for interviewing.
- 16 High, “Bridging Distance in Project-Based Research,” case study.
- 17 According to John Neuenschwander, in *A Guide to Oral History and the Law*, 2nd ed. (New York: Oxford University Press, 2014), 69, “Employees and independent contractors often create copyrightable works for others. The work-made-for-hire doctrine is the mechanism by which the act seeks to sort out the ownership rights of the various parties who may be involved in the creation of a copyrightable work.” For example, as an employee and faculty member of Baylor, I do not need to sign a release form for the interviews I conduct for the Institute for Oral History because it is understood that in my position, whatever interviews I conduct belong to my employer. This is often the case for those working at libraries, archives, etc.
- 18 Neuenschwander lists six exclusive rights of copyright in *A Guide to Oral History and the Law*, 71: “(1) to reproduce the copyrighted work in copies or phonorecords; (2) to prepare derivative works based upon the copyrighted work; (3) to distribute copies or phonorecords of the copyrighted work to the public by sale or other transfer of ownership, or by rental, lease, or lending; (4) in the case of literary, musical, dramatic, and choreographic works, pantomimes, and motion pictures and other audiovisual works [which could include oral histories], to perform the copyrighted work publicly; (5) in the case of literary, musical, dramatic, and choreographic works, pantomimes, and pictorial, graphic, or sculptural works,

- including the individual images of motion picture or other audiovisual works, to display the copyrighted work publicly . . . ; (6) in the case of sound recordings to perform the copyrighted work publicly by means of digital audio transmission.”
- 19 Jack Dougherty and Candace Simpson, “Who Owns Oral History? A Creative Commons Solution,” *Oral History in the Digital Age*, 2012, <https://ohda.matrix.msu.edu/2012/06/a-creative-commons-solution/>. This article is a great resource to show how Creative Commons licenses can work well for oral history projects.
 - 20 Definition from OHA’s Principles and Best Practices Glossary, <https://oralhistory.org/best-practices-glossary/>.
 - 21 More information about the options for and types of Creative Commons licenses are listed and explained in great detail on their website, <https://creativecommons.org>.
 - 22 “Subpart A—Basic HHS Policy for Protection of Human Research Subjects” (known as the Common Rule), Code of Federal Regulations, Title 45, Subtitle A, Subchapter A, Part 46, Section §46.102, www.ecfr.gov/current/title-45/subtitle-A/subchapter-A/part-46#46.102.

4

MANAGING REMOTE PROJECTS

Michelle Holland

At this point in the oral history life cycle, the initial planning has been done and the project gets underway. As mentioned in Chapter 2, “Project Design,” all oral history work consists of a sequence of steps, beginning with an idea and ending with one or more recorded interviews that have been archived and typically made available to the public. Though there are many variations, we call this set of steps a project. This chapter discusses best practices for managing oral history projects, with special attention given to managing projects remotely.

Like many of us, I began thinking a whole lot about working remotely in the spring of 2020. The COVID-19 virus became a legitimate concern for our corner of the world right before Baylor’s spring break, and the office manager at the Institute for Oral History (BUIOH) emailed our student workers, letting them know what to expect upon their return: “I will be placing hand sanitizer throughout our suite that you can use. Also, there will be disinfectant wipes in the transcription area to wipe your headphones and keyboard.”¹ We never dreamed that the one-week spring break would turn into two weeks; that Baylor would ask all of its professors to transition their classes to a remote format, first for only two weeks and then for the remainder of the semester; and that our city’s mayor would issue a shelter-in-place order.² All within two weeks. We found ourselves figuring out how to set up our student workers, who are a vital part of our office workflow, to do their work remotely—and then ourselves.

Our office was fortunate in that the university had recently, in 2018, moved our server to the cloud via Box, so we already had the ability to access most of our files remotely. And working from a distance was not uncharted territory for us. Before 2020, students, staff members, and partners had

occasionally worked remotely due to illness, temporary mobility challenges, travel, or the inherent process of conducting interviews in the field, but up until the spring of 2020 it had always been a temporary setup. So while I felt a measure of relief in knowing that we *could* function in a remote environment, I also knew that unanticipated challenges would arise. For me, the most worrisome factor was having no idea how long the lockdown would last. I knew we could work remotely—but for how long?

When people hear “remote oral history project,” their minds often turn immediately to how that affects the interviewing process itself—and understandably so. However, the remoteness of a project has implications for other aspects of the work as well. As the manager of our transcript workflow and editorial students (transcribers and audit-checkers/editors) at BUIOH, I learned during the lockdown that in the remote world, organization and communication are more important than ever. Flowcharts, spreadsheets, written training/instruction guides, file management systems, and regular meetings are essential to well-run remote projects.

Managing People: The Oral History Team

Project Director/Project Manager

Though oral history projects can exist in many forms, from a one-person endeavor to a large-scale enterprise with multiple team members, many of whom may be working in different locations, one person should always be at the helm, overseeing all phases and ensuring that all project roles are fulfilled, tasks completed, and partners kept in the loop. In this book, we call that person the project manager and task them with helping to bridge whatever distances are involved with the project, be they between team members, between interviewers and narrators, or both.

Outside of the project director, roles for an oral history project typically include researchers, interviewers, technical experts, digital processing technicians, transcribers, centralized support persons, bookkeepers, and archivists. These roles may be taken on by a single multitasker or mixed and matched according to the skills of each worker in larger projects, but it is imperative that team members, however many there are, understand the intention of the project and their responsibilities and are properly trained.

Researcher/Subject Expert

For any oral history project, research is critical so that interviewers can ask narrators informed, thoughtful questions. Larger projects may want to bring someone on board who is knowledgeable of the overall topic or era that the project explores, to help interviewers think through specific topics they may

want to cover with their narrators. This person can put together selected research materials for all interviewers to consult and also point interviewers to other useful resources. Even if a dedicated researcher joins the team, interviewers will still want to research matters on their own that are particular to their narrators.

Interviewer

An interviewer is at the heart of an oral history project and will be involved in researching topics that the project aims to investigate. Additionally, an interviewer will be responsible for conducting a pre-interview with each narrator, and one or more follow-up recorded interviews. Interviewers may also create lists of challenging words, field-specific terms, and proper nouns—spelled correctly—for transcribers and serve as a liaison with the narrator where needed in the post-interview/processing phase. The interviewer is sometimes the best person to transcribe an interview because of their preparation for and memory of the conversation. In a classroom setting, teachers might make transcription a requirement for their student interviewers.

Technical Expert

For remote projects, the role of technical expert takes on a heightened level of importance. Depending on the project design, the narrator and interviewer may be in different locations, the interviewer may be out in the field with limited technology, or all team members could be working remotely. Regardless, the technical expert will be in charge of helping everyone to set up their respective equipment and software properly, test out everything to make sure it is functioning properly, and troubleshoot any problems.

Digital Processing Technician

This team member will work with the team's archivist and handle incoming interview files: creating an entry in the project's data management system for each interview, placing the raw media files in a safe space for preservation purposes, concatenating individual audio and video tracks into one continuous track as needed, and creating an access version of the interview file for sharing with the public. If a narrator requests that the project remove a segment from their interview, the digital processing technician would likely be the one to isolate and delete that portion from the recording.

Transcriber

An early decision that project managers need to make is whether or not the interviews will be transcribed, as this decision will significantly impact the

training, team, timeline, and budget of a project. A transcript is a written representation of the interview that greatly increases its visibility, accessibility, and usability, and the Oral History Association lists transcription in its Principles and Best Practices.³ That said, quality transcription is a time-consuming task that project directors need to understand before writing transcription into the project plan. Unless someone has personal experience with transcription, it is easy to underestimate how challenging it is—and also how long it will take—to do it and do it well. Project managers should devote time to learning about transcription so they can give clear instructions to their team on how to create professional-looking, useful, and accurate transcripts.⁴

Fortunately for remote projects, transcription can easily be done from a distance. Project managers and transcribers can set up workstations at home, school, or the office—preferably a quiet space, free from distractions, so that transcribers can focus on each narrator’s voice and story. Each transcriber will need a pair of good-quality headphones, a transcription foot pedal, and transcription software that will sync the audio with the foot pedal for easy advancing and backtracking of the audio.

Most projects will make use of paid automated transcription services that will generate rough versions of transcripts using AI technology,⁵ but this method may not be the most appropriate for every interview. For group interviews, poor-quality audio recordings, or strong accents, old-fashioned (manual) transcription may be the better choice. But no matter the method, transcription is a tedious process that requires someone with a good ear, an attention to detail, and a love of research since transcription involves looking up how to correctly spell the many proper nouns and uses of jargon that naturally surface during conversations. Alternatively, some projects may out-source transcription to professionals.

And there are less-expensive alternatives to transcription. An interview summary, often called an abstract, or an audio index/audio log can also increase accessibility to the interview content.⁶ Another possibility is to take advantage of the open-source Oral History Metadata Synchronizer (OHMS), which allows users to create detailed audio indices with or without an existent transcript.⁷

Centralized Support

For large projects where team members are working in various locations, centralized support is critical. The person(s) assigned to this role will be responsible for gathering and digitizing hard copies of documents, making sure all files (both digitized and born-digital) are labeled correctly and placed where team members can locate them, and checking in and checking out equipment. Basically, this person will oversee and organize all of the “stuff” that a project uses and accumulates.

Bookkeeper

This role ensures that the project adheres to its budget and uses its funds wisely. Most granting agencies and financial partners will understandably want to see receipts and detailed reports of how their money is being spent. The bookkeeper will need to implement some organizational method, such as a spreadsheet, at the beginning of a project to keep track of expenses, and this person should make notes to explain any deviations from the initial proposed budget, such as unexpected expenses or the project not buying something it initially thought it needed.

Archivist

Oral history interviews must be preserved, and this is the task of an archivist. Most people think of archiving and preserving as happening at the end of an oral history project, but these steps start much earlier than that. During the planning phase, the project should identify a repository that seems like a good fit and start a conversation about what recording and documentation practices the repository prefers. The team archivist will help the team stay on track with the wishes of the repository.

Putting It in Writing

When team members agree to serve on a project, the director should ask each one to sign a contract that outlines their roles and responsibilities. Having individuals sign this form professionalizes a project, which is particularly important for ones relying on volunteers. The contract need not be anything elaborate; it just needs to state, in plain terms, what the individual has agreed to do for the project.⁸

Managing Training

Unless your oral history project is a one-person operation, the individuals working on the project will organize as a team, and training is vital for the successful execution and completion of such projects. For scenarios in which team members are in different locations, training sessions should ideally use the same platform that interviews will be conducted in. This will allow everyone involved with the project to become better acquainted with the platform, discuss weaknesses to be addressed, and have a better understanding of the final recording files they will be working with and supporting.

Some team members will have specific tasks to be trained in and will require separate training sessions, as discussed here, but project managers should schedule a general meeting with the team at the beginning of a project to introduce everyone and announce the parts they will play, talk about the goals and importance of the project, and discuss information that is relevant

to everyone. If in-person training is possible, providing beverages, fruit, pastries, cookies—whatever is appropriate and the team will enjoy—is a time-honored tradition of encouraging get-to-know-you chatter and letting your team know that you appreciate their time. For remote training sessions, managers will have to be creative with finding ways for team members to interact and also to add an element of fun.⁹

Interviewer

By the end of their training session, interviewers need to understand the importance of asking informed, open-ended questions. For projects relying on volunteers, or for classroom projects, it is inadvisable to simply give interviewers a list of topics or questions, even if the interviewers are from the community being interviewed. Instead, the project manager or team researcher should provide interviewers with a manageable amount of reading material, point them in the direction of other useful resources, and help them understand how to formulate interview questions from the research.

If narrators and interviewers will be in different locations, the training will need to include detailed instructions on how to use the technology involved in distance interviewing. The project will want to hold the interviewer training session on the platform that the project has chosen for interviews, if using video, even if the session could be held in person, since it will be easier to explain the technology if everyone is using it during training. Furthermore, silence is an important tool in the interviewer's tool kit, and learning how to allow for it in an interview—as it might feel even more uncomfortable in remote settings—and not jump to fill in that silence can garner gems of stories. However, using silence effectively is challenging when there is a delay in sound or video transmission, or when the interview takes place over the telephone and there are no visual cues to work off of. Talking about all of this with interviewers will give them time to mull over their approach in the days leading up to their interviews.

Training should include exercises for interviewers to conduct practice interviews on the same recording platform and setup they will be using in real-time interviews. This exercise will prepare them and aid in calming their nerves when the time comes for the actual interview. From 2020 to 2022, the Oregon Jewish Museum and Center for Holocaust Education (OJMCHE) conducted a large-scale remote oral history project to explore the COVID-19 experience as well as recent political events, and project manager Alisha Babbstein made practice interviews a part of the training process. She explains:

After each training session, I scheduled individual mock interviews (of myself) for each interviewer to test their skill level operating the software and to allow me to troubleshoot any issues before they began an official interview. I also had the interviewers practice asking me a few questions to get a feel for both the question set and for actually conducting an interview.

I would intentionally answer questions vaguely or with a tangent to encourage them to ask follow-up questions and practice guiding the interview.¹⁰

In addition to teaching interviewers best practices for conducting an oral history interview and insisting that they practice, project managers also need to stress the importance of conducting a pre-interview to work out any technical kinks or compatibility issues with a narrator. In our spring 2022 survey of oral history practitioners who were active during the COVID-19 pandemic, several pointed out the elevated importance of these meetings for remote interviews, with one respondent stating:

It was imperative to schedule a substantial pre-interview conversation via [the recording platform of choice], to make sure everyone was comfortable with the technology. These pre-interviews usually lasted longer than usual, so I had to budget time differently. But the longer pre-interviews set the stage for better interviews—a good reminder of how important interviewing fundamentals are.¹¹

In their case study about the Arthur Ashe Oral History Project at University of California, Los Angeles, project director Yolanda Hester and interviewer Chinyere Nwonye also mentioned the significance of pre-interviews for remote projects:

Pre-interviews became the most vital step in our process. We decided early on that all pre-interviews must be done via Zoom, unlike in the past when a quick phone call would do. These prep sessions not only allowed us to confirm whether narrators had access to a computer but also to verify whether they had a functioning camera and microphone. And since Zoom records video, something we were not collecting before, the pre-interviews allowed us to make suggestions as to where narrators should sit to get the best light or reduce background noise. We were also thankful for the many family members of narrators who served as tech support on the other end, helping narrators navigate the technical aspects of the project. Besides the tech run-through, the biggest benefits of the pre-interview were the levels of comfort and confidence it bestowed on narrators before the formal interview and that it allowed for collaboration on the interview outline.¹²

Writing a guide for interviewers that explains common computer/telephone settings that need to be adjusted, how to achieve the best lighting and framing for video interviews, and ways they might want to arrange (and ask narrators to arrange) the space behind them is highly recommended.¹³ For the volunteer interviewers she oversaw for OJMCHE's project, Alisha Babbstein "created training materials, including a PowerPoint slideshow with step-by-step

instructions supported by screenshots directly from TheirStory screens, a checklist, and a project FAQ to help them respond to likely questions from narrators about the project.”¹⁴ Yolanda Hester and Chinyere Nwonye with the Arthur Ashe Oral History Project decided that narrators needed a manual, too:

Many of our narrators, contemporaries of Ashe, were retired and their daily routines were not tied to a computer, so our first task was to help train narrators on these new tools. After reviewing several sample manuals and concluding that they assumed a level of familiarity with computers, Chinyere decided to create a how-to manual from scratch. She utilized both text and images describing how to download, install, and use Zoom.¹⁵

Transcriber

Humans are still a vital part of the transcription process, even if a project is using an automated transcription program, as discussed earlier in this chapter. Although the technology surrounding automated transcription has improved significantly, it still struggles determining between multiple speakers and cannot comprehend the full breadth of language, culture, and context, and thus these transcripts require thorough audit-checking for accuracy and editing of punctuation. When meeting with transcribers for training, the project manager should explain the expectations and deadlines for the transcripts and ask them if they need any help setting up their workstations. Next, project managers should make sure that transcribers have access to all the templates, examples, resources (including the agreed-upon style guide),¹⁶ software, and equipment that they will need, and project managers should go over each one with them so that they understand its purpose. When the transcribers get started, the person in charge should look over several pages of their work and offer feedback, as detailed later in this chapter.

Other Roles

Specific training sessions may not be needed for other team members, but a project manager should meet with all of them individually, or by role for large projects, to ensure that they understand what tasks they are responsible for and that they know where to find everything they need to do their job.

Managing Communication and Feedback

For an oral history project, communication is key for success, and this is especially important when working remotely. It is essential that team members keep in contact and hold regular meetings, preferably by live video, to avoid misunderstanding or one person going off on a tangent.

To enable communication between team meetings, project directors can compile a list of phone numbers and email addresses and make the list available to the group. They can also survey team members concerning how they prefer to communicate—whether by talking on the phone, emailing, texting, or meeting face-to-face (whether in person or via a videoconference platform). Obviously, each person's preference will not be suitable for every situation, but the information will help everyone know the best way to reach someone—and to reach them quickly, if needed. Emergencies do happen, even in oral history!

As team members get started in their designated roles, the person in charge should review their first samples of work and provide feedback. Most team members should go through training, as outlined earlier, but they will still need guidance to ensure that they are on the right track. After reviewing everyone's work at the beginning, the project manager should continue to spot-check submissions and also check in with team members from time to time to see if they are dealing with any new challenges—and to simply make sure that they do not feel forgotten, which is a danger when working remotely. A large 2020 study by the Harvard Business School found that virtual business meetings between interns or new employees and their managers can be just as meaningful as in-person meetings, so never underestimate the power of a brief video chat.¹⁷

Along those same lines, the project director should not be the only person offering feedback. In the summer of 2021, *Forbes* magazine published the results of a study of more than four thousand employees around the world which found that highly engaged employees responded that they felt heard at work three times more than highly disengaged employees. That same study reported that 74 percent of employees said they do their jobs better when they feel heard.¹⁸ Therefore, it is vital to let team members know that you want to hear their ideas for how to make the project better. Certain aspects of the project will be set in stone, but for areas that are flexible, such as workflow, a project manager should be open to testing ideas that team members suggest and making changes. In his case study that reflects on two large-scale oral history projects, “Montreal Life Stories” and “Deindustrialization and the Politics of Our Time,” Steven High, a history professor at Concordia University in Canada and founding member of the Centre for Oral History and Digital Storytelling, details the need for instituting a spirit of true collaboration in oral history projects. He states, “Collaboration needs to be organic and not reduced to bureaucratic reporting requirements.”¹⁹

To achieve an environment in which everyone feels engaged and heard, project managers will want to read up on some basics about introverts and extroverts so that they understand how whichever category they themselves fall into will affect their leadership and they also understand how to help their introverted team members flourish.²⁰ This is especially noteworthy for large projects in which team members are in different locations, as the distance will only exacerbate everyone's personalities and habits. Erica

Dhawan, a researcher of human innovation and collaboration, sums it up this way: “The key for leaders is to create a digital environment that fosters and encourages a range of communication styles so that everyone can engage authentically.”²¹

Accountability

Moving through a project from beginning to end, project managers should hold team members to high standards. In a remote environment, and especially if working with volunteers, it is easy for the project to take a backseat to life and for oral history quality to nose-dive. While perfection should never be the expectation, directors should continually encourage team members to do their best and, when things go wrong, to think of ways to do better next time. One way to maintain standards is to, again, spot-check work as it comes in to ensure that team members are adhering to guidelines. If the person in charge notices a consistent problem with something, they should gently inform the individual of the error and ask them to correct it.

In the same vein, project managers should help team members stay accountable, and a tried-and-true way to achieve this is by requiring regular updates and time log submissions. This is recommended even for nonpaid volunteers. They may not be getting monetary compensation, but they made certain promises when they volunteered for the project and should be held to those promises. Naturally, some individuals may need to back out of a project for a variety of reasons, but others need to show they are serious about putting in the time and completing the tasks they signed on for.

Inspiration

In any long-term project, keeping spirits high is an arduous task, and this is especially true for endeavors relying largely on volunteers who are working remotely. The person at the helm of a remote oral history project should be intentional about expressing appreciation for everyone’s work and celebrating milestones and jobs well done along the way. They should remind the team occasionally of the big picture and encourage them to take pride in their work. On the other hand, project managers also need to stay alert for signs of fatigue or dissatisfaction and, if feasible, reassign team members to different roles. If a team member seems particularly disengaged from the project, it is advisable to schedule a face-to-face meeting and ask if everything is okay.

Here are a few tips for motivating and inspiring team members:

- Compile a list of birthdays, anniversaries, or other important dates for team members and send a quick text or email on those days.
- Share with team members any compliments or thank-yous that you receive from narrators, family members, or project partners.

- Ask interviewers and transcribers to share memorable stories they encounter with the team.
- Announce encouraging milestone updates to the team, such as every x individuals who have been interviewed, x interview hours that have been recorded, or x pages that have been transcribed. The numbers you decide on will depend upon the size of the project.

Keeping Enthusiasm in Check

For most project managers, the challenge will be checking in enough with their team, but enthusiastic project managers should avoid checking in too much. As noted earlier, managers should seek to be informative, helpful, and encouraging, but they also should be mindful not to overwhelm their team members with messages and meetings, especially if they are dealing with volunteers who have jobs and other obligations to juggle on top of the oral history project. Speaking to this concern, a research team from the psychology departments at University of Georgia and University of South Florida explored communication with remote workers in various occupations during the COVID-19 pandemic and concluded the following:

In considering communication frequency, managers should recognize the potential tradeoff between performance and burnout. Small gains in performance are unlikely to be beneficial over time if accompanied by an increase in burnout [from excessive communication]. Rather than focusing on communication quantity, managers may be better served by focusing on quality, which is beneficial for both performance and [prevention of] burnout.²²

The researchers defined *quality* in this context as “the extent to which a person feels that they received the information needed to do their job.”²³ What this recommendation looks like will be different for every oral history project and may even vary between particular team members, but project managers should aim to put in place a regular regime of communication, while being mindful that all exchanges and meetings serve a specific purpose. No one likes to feel like their time is being wasted.

Managing Equipment: Hardware and Software

Oral history projects can include a dizzying array of equipment: laptops, scanners, cameras, audio and/or video recorders, lights, microphones, memory cards, external hard drives, transcription foot pedals, headphones, and a variety of cords and adapters—each item with its own model number, technical specifications, and connection to other equipment. Things get even more

complicated if some or all of the team members are working remotely, if the interviews are conducted remotely, or if the project must supply equipment to narrators. This chapter offers guidance on how to organize and care for equipment; see Chapter 6, “Remote Recording Technology,” for details on how to select and use technical equipment.

Paper Trail

The larger the project, the more important it is to have a system for keeping track of equipment. Though some smaller projects may wish to simply use a paper system, we recommend using digital tools for keeping records. A spreadsheet is a good format, though simpler methods can be devised as well, such as a table on a word-processing document. If the recordkeeping system is on a shared platform in the cloud, team members can check out equipment and report damaged equipment from the field. Whatever the method, the most important thing is to make a note of each piece of equipment and when it is checked out or in. The spreadsheet or table should also include the following information for each item: a detailed description, including model name and serial number (or a number that the project assigns and attaches to each item); date of purchase; location of purchase; cost; name and contact information of person who checked out the item; physical location of where the item resides when not checked out; and a notes field where problems can be documented.²⁴ People may be picking up items from a central location, team members may need to purchase items and then be reimbursed later on, or the equipment manager might be mailing items to team members or even narrators. Judy Hughes, a consulting historian, writer, and multimedia producer conducting interviews in Australia during the pandemic, felt that her narrators having quality microphones was critical for remote audio recordings. In her case study, she describes how she mailed one to each narrator, even though that was no easy task at the time due to COVID-19 restrictions.²⁵ Whatever a project decides to do regarding equipment requires a well-thought-out plan so that the project/equipment manager knows at all times what the project has to work with and where everything is, since even a few items going missing could create budgetary and logistical nightmares.

For example, imagine that a project conducting interviews over a video-conference platform purchases six webcams and six microphones to distribute to interviewers and narrators as needed. The equipment manager mails out several of these items early in the project but then forgets about them as no one requests equipment for several weeks. But suddenly, the project adds three interviews to the calendar with narrators who all request both a webcam and microphone, and the equipment manager can only find one of each. If the project has good records, they will know exactly who to contact to have the equipment returned. If not, they will have to spend time figuring out who owes the items—or purchase more.

Responsibility

To help the project adhere to its budget, the project manager should emphasize to team members that they are responsible for equipment in their possession. Team members need to understand that if they lose or damage something, they will need to reimburse the project for the cost to replace it. This expectation should be in writing on an equipment-loan-agreement form that team members sign as they check out items.²⁶

Software

In addition to all the hardware, a project will also rely on a wide variety of software products and services to assist with tasks such as the following: processing and editing interview recordings (audio and/or video); creating and audit-checking transcripts; digitizing physical documents; and creating a website, online database, or multimedia exhibit to share the project with the public. Fortunately, software is easy to deliver to remote workers, but most licenses will involve passwords or registration keys that the project needs to keep up with and distribute as needed.²⁷ Moreover, many software companies limit the number of users or devices that can download/use each license, and the team should be mindful of these details so they can be resourceful and good stewards of their budget.

User Training

It is the project manager's responsibility to ensure that team members understand not only their job but also the software and hardware they will use to do their job so that there is uniformity amongst all generated files, and a great way to accomplish this is via instruction sheets that outline all preferred settings for the project. These instruction sheets can be text only or include screenshots/images for settings that are complicated to explain. Project managers can give these guides to team members according to role and then ask interviewers to send in test tracks from their recorders, digital processing technicians to share the first interview files they process, centralized support persons to send in a few digitized documents, transcribers to send in the first few pages of transcripts they work on—whatever the case may be—to double-check that everything is in order. These extra measures at the beginning will help to prevent headaches and extra work later on.

Oral History SOS

Next, because machines and technology can malfunction—and tend to do so at the most inconvenient of times—project/equipment managers should either

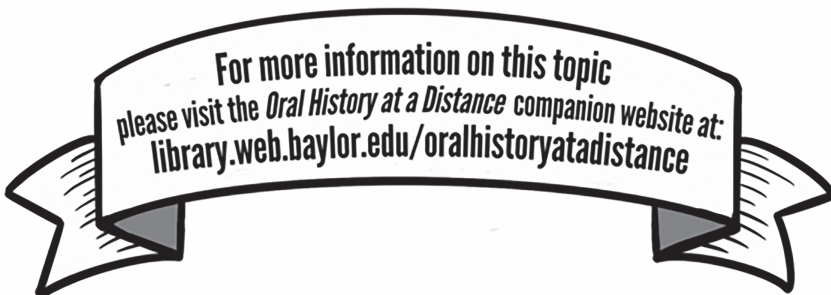
test out items before loaning them out or give team members instructions for how to regularly perform these tests. This will prevent a number of technical mishaps. For other, unavoidable equipment snafus, every project needs to designate at least one person to answer the team's technical questions and to be on call for emergencies that may arise during interview sessions. Every team member should keep this number in an easy-to-find location.

Managing Files

Oral history projects produce loads of files: receipts, research notes, signed contracts, equipment loan-out forms, audio and video recordings, current photographs of narrators, interview data forms, word lists, transcripts, abstracts, audio indices, historical documents and photographs that narrators may share—and the list goes on. Remote projects necessitate that these files, whether born-digital or digitized, be available and readily accessible to all team members. The project manager must formulate a plan at the outset to keep everything in order since failure to do so could result in lost files and an arduous, time-consuming task to find, reconstruct, or work around the casualties.

Sharing Files (in the Cloud)

Remotely managed projects should consider signing up for a cloud storage platform where team members can upload/update items in real time. The cloud account will serve as a central storage and delivery space and will allow the project manager more oversight as to what everyone is, or should be, working on.²⁸ One respondent from our 2022 survey recommended, “Especially when working with multiple interviewers, have one location where files are uploaded or deposited (e.g., Box), and have a checklist of what should be submitted or completed for every interview for consistency and quality control.”²⁹



File-Naming and Formatting Conventions

To most of the world, the requirement for file-naming conventions is one more stupid rule imposed upon them by the techies. To digital archivists, the protocol for naming files can make the difference between finding an important file (interview recording, transcript, associated image or document) or one related to it—or losing it forever. And sometimes when a file cannot be located, a project manager or team member will spend time recreating it—only to later find the original missing file under an unexpected name. (Yes, this has happened to us, and it’s very discouraging!)

From the beginning, the project manager needs to construct a file-naming system, or communicate an existing one, and then remain vigilant about this throughout the project.³⁰ Ideally, each interview should have a base that all related files share. For example, the audio recordings for two interviews with John Howard Holloway could be labeled “holloway-jh_2021-11-06” and “holloway-jh_2021-11-13,” with “holloway-jh” and sometimes the date serving as the base. The folder for his interviews would be labeled “holloway-jh” with related files named as follows:

- holloway-jh_contract
- holloway-jh_historical image 1
- holloway-jh_historical image 2
- holloway-jh_interviewer research notes
- holloway-jh_narrator correspondence
- holloway-jh_narrator transcript corrections
- holloway-jh_newspaper article
- holloway-jh_2021-11-06_abstract
- holloway-jh_2021-11-06_interview data form
- holloway-jh_2021-11-06_transcript
- holloway-jh_2021-11-06_word list
- holloway-jh_2021-11-13_abstract
- holloway-jh_2021-11-13_interview data form
- holloway-jh_2021-11-13_interview photo
- holloway-jh_2021-11-13_transcript
- holloway-jh_2021-11-13_word list

There is no one way to label a file, and the best system will depend on the project and what the chosen repository may prefer, but it is essential to develop a system early on and stick to it.

In the same vein, and related to the information discussed earlier in this chapter under “User Training,” the project manager should outline policies for how everyone should format files so that all similar files are the same type and quality—and to prevent the redoubling of efforts later on. The project/team archivist will want to consult the repository for their protocols for

digital files, to include both scans of photographs and documents as well as technical specifications for born-digital files.

For maximum efficiency, the project director should request digital (and not paper) copies of all documents contributed by team members and partners, if possible. The pandemic and the necessity to work remotely accelerated the importance of and dependence upon remote access to documents. For example, when our student transcribers and editors began working from home in 2020, I soon noticed a problem: they did not have access to the physical “Notes and Correspondence” folder that we had created for each narrator and housed in filing cabinets in our office. At that point in time, these filing cabinets were where we stored interview data forms, research notes, word lists, and any other information that interviewers provided us, and these documents were extremely useful to our students working on transcripts.³¹ Once lockdown restrictions eased and our faculty and staff were back in the office, I was able to look for these documents myself and scan and add them to the digital folders for our students to access while working remotely. While on the one hand I was excited to be able to provide these materials to the students, I often thought about how I was scanning documents that had, for the most part, been created digitally in the first place. There was a disconnect. Granted, we could not have predicted the pandemic and importance of asking for documents in digital form, but the situation made us aware of how we should start doing so as soon as possible.

A brief tangent and word to the wise for project managers: make things easy on yourself where possible. It is easy to fall into the trap of saying, “Oh, I can do that. It won’t take long,” but small tasks add up over the life of a project. A project director has lots on their plate to begin with, and they should remove anything from that plate possible.

Deed-of-Gift Form

One of the most important files for any interview is the deed of gift, or contract, which explains ownership/copyright of the interview. This form can be particularly challenging to acquire for remote interviews, as evidenced by our 2022 survey. Several respondents cited the difficulty in obtaining signed forms as a challenge that cropped up during the pandemic.³² However, failure to secure a signature from the narrator can keep an interview in limbo, unable to be processed, transcribed, indexed, archived, and shared. Oral historians have different opinions on when to ask for that signature. Some believe during the pre-interview or right before the interview is best, while others prefer to wait until after the interview or interview series is complete. Either way, the project manager needs to stay on top of this and see to it that no processing work on the interview begins until that signed contract materializes. This is for both ethical and pragmatic reasons. Without the signature, the team has no legal or ethical right to work with the interview

recording, and should the narrator never sign the form, the team would have spent countless hours processing an interview that could not be made public. Hence, project managers or interviewers should work with narrators to find the most convenient way to get signed forms from them. If narrators are tech-savvy and the repository accepts digital signatures, a digital form might be the most convenient method. If a snail mail copy is preferable, the project director should contact the narrator to let them know when the form is in the mail, and then they should also set up reminders to follow up if the signed form has not been returned by a certain date.

Transcripts/Contact with the Narrator

At BUIOH, we believe that giving narrators the opportunity to look over their transcripts is an important part of the oral history process. We send narrators their transcripts to review in digital form, and we ask them to email us any corrections that we need to make. We recommend sending narrators PDFs instead of Word documents to discourage heavy-handed revisions. The goal is for narrators to correct any misspelled proper nouns or misunderstood words—not to edit or change the interview. Narrators vary a great deal in their response to seeing their spoken words in print. Some ignore the request to review and either fail to respond altogether or approve the transcript after barely looking at it. Others are aghast at seeing their spoken words in print and wish to edit extensively. (The latter is especially true with academics, teachers, public figures, and writers.) Because of this, we send transcripts along with specific instructions for reviewing, explaining the importance of only making corrections, not sweeping edits.³³ The digital world makes it easy to also share recordings with narrators, and our normal protocol is to place a PDF version of the transcript and an MP3 or MP4 of the audio or video recording in a cloud-based folder and to include a link to these materials in an email to our narrators. This method has several advantages:

- reduces the temptation for narrators to rewrite sections since PDFs are difficult to edit;
- increases visibility for narrators with impaired vision, as they can enlarge the files on their screens;
- saves everyone the cost and hassle of postage, especially if narrators live in another country;
- saves on the cost of supplies like paper, ink, and envelopes;
- eliminates time spent on our end trying to decipher difficult-to-read handwriting;
- allows us to save each narrator's edits in their digital folder in the cloud for easy preservation and access; and
- relieves us from having to find physical space to store marked-up transcripts.

If narrators prefer a hard copy to review, they can print a copy on their end or request that the project mail them one.

Since interviewers have the strongest personal relationship with narrators, it may make sense for them to be the point person to communicate with narrators about their transcripts. But whatever the transcript review phase looks like for a project, managers need to record the date transcripts are sent to narrators for review, record the date of approval of the transcript or when corrections are received, and follow up with narrators who have submitted neither by the deadline.

Managing Expectations

Distance introduces more opportunities for things to go haywire, despite the best of planning and intentions, and project directors should work earnestly to manage expectations of team members, narrators, and partners so that no one gets discouraged or is unpleasantly surprised with the end products. The project team should have frequent discussions about the challenges and limitations of a remote project.

One area where this will be highly important is that of recording quality when interviewers and narrators are in different locations. For those unfamiliar with remote interviews, and oral history in general, they may very well expect studio-quality recordings, the kind they hear on professionally produced radio and television programs or in some online content. While some projects will have the budget, connections, and expertise to achieve this level of quality, most will not, and everyone should understand what the project's recordings will sound like and also that the lower quality will impact the transcription process as well.

Hand in hand with the recording quality is the technology itself. Team members can assist narrators with plugging in devices, installing programs, and arranging settings, but they have no way of knowing the full scope of what all is going on with narrators' technology and internet/phone connections. A pre-interview meeting is a helpful way to root out problems but is only a start. Not having access to both computer setups is a built-in obstacle with remote recordings.

Along those same lines, when conducting remote interviews, interviewers are tasked with controlling two recording environments instead of one. Many in-person interviews end up with a variety of sounds in the background: dogs barking; trains, planes, and automobiles passing by; construction; neighbors mowing lawns and trimming bushes; family members or coworkers going about their day; and various people calling on the phone or popping in for visits. Now that two locations and backgrounds are at play, interviewers have their hands full trying to achieve a clean recording where the narrator is clearly audible. In an article she wrote for the Oral History Society's blog, Angham Abdullah, who recorded interviews with Syrian refugees in Wales during the

pandemic, noted the challenge of “dealing with the noise of children at the interviewee’s house, street noise, postmen and deliveries at my door or their door, my next-door neighbour’s loud music, and my smoke alarm going off whenever my daughter burnt her eggs!”³⁴ Over in Canada, Kimberley Moore with the Manitoba Food History Project was also conducting interviews during the lockdown and ended up with these unfortunate sounds on a recording:

A few minutes into our interview I could hear, on the interviewee’s line, what sounded like a baby crying. This was the interviewee’s cat. I had not sequestered my cat or dog for the interview (they normally ignore me and sleep, respectively). Yet, shortly after the cat began to yowl on her end, the dog woke up on my end and began to whimper in a way that only an insecure, senile, geriatric dog can. I leaned over to pick up the dog, startling him into a blood-curdling yelp. As I was doing so, my cat joined us on my desk to block the camera with her tail as she walked across my keyboard.³⁵

It will help for interviewers to emphasize to narrators the need for quiet, but life goes on during interviews, and interruptions are simply doubly likely with remote recordings.

When it comes to the relational aspect of oral history, interviewers conducting remote interviews may face difficulties in building rapport and effectively communicating with narrators. Some narrators will not mind the use of remote technology and will appreciate the convenience it affords, but others who, under the best of circumstances, are slow to open up will test the best of interviewers’ skills.

Finally, remote projects can present significant scheduling challenges, particularly if team members and/or narrators reside in different time zones. If that is the case, the team should make meeting times as clear as possible in all correspondence, be it for team meetings or interview sessions, and send reminders ahead of time. For instance, instead of saying “10:00 a.m. local time” (whose local time?), write it as “10:00 a.m. CDT.” Take advantage of websites that will help you do the conversions correctly, since calculating time zones can get confusing fast.

Managing expectations is not an easy task, but a project manager should attempt to open everyone’s eyes to the inherently messy nature of oral history but also the awesomeness of being able to make the world a smaller place with remote technology.

Managing Sticky Situations

Finally, the project director will have to manage any sticky situations that develop. These are a given with large projects but can be an issue with smaller

ones as well. Project directors should be prepared to apologize for mistakes that are not their own, put out fires, and make tough decisions.

For starters, project managers will need to step in when things go wrong. This could mean, for instance, taking responsibility for recordings that are corrupted, lost, or unusable due to technological problems, communicating the predicament to narrators, and gauging whether or not they are open to a redo. It is the type of phone call that everyone dreads having to make, but, as a Baylor doctoral student explains, the situation can turn out well:

After concluding an interview over the telephone for an oral history project, using a brand-new recorder, a staff member at the Institute for Oral History reached out to inform me that I failed to properly save the interview. Disappointed, I thought through my options, and I worried that the interviewee, who had just given me a significant amount of time and provided wonderful insights during the oral history, might be uninterested in conducting another interview. I was wrong, though, and she enthusiastically participated again! I made sure to press the proper button on the recorder this time.³⁶

In this example, the student was both project manager and interviewer and so was the obvious person to relay the unfortunate news. For larger projects with a team in place, the interviewer may naturally want to be a part of this conversation, and even take the lead, but the project manager needs to ensure that the communication and follow-through happen.

Next, project managers may deal with narrators who fail to submit corrections after initially expressing excitement at having the opportunity to do so. They may ask for several deadline extensions but ultimately never find the time to focus on reviewing their transcripts. It is a difficult position to be in: the person in charge would like to keep accommodating a narrator's request for additional review time but also has to be mindful of the overall project timeline. If project managers find themselves in this situation, they will need to kindly yet firmly communicate to narrators that they cannot wait any longer for corrections and must move forward with processing these interviews.

Finally, all projects are at risk of losing team members due to moves, health issues, family emergencies, overcommitment, or any number of other reasons. It might prove even more difficult to retain workers for projects where they are working remotely. Regardless, it is the project manager's responsibility to find replacements for these individuals or to pick up the slack themselves. Similarly, they may be put in the awkward position of needing to let team members go who have fallen behind on their work and are holding up the project.

Conclusion

Although the fundamentals of oral history stay the same when conducting remote oral history interviews, project managers need to understand what adjustments need to be made so they can train and lead their team to the successful completion of a project. A respondent from our 2022 survey underscores why organization and communication, as discussed in this chapter, are key to keeping everything on track:

The amount of attention that needed to be paid to files across devices and platforms, almost a “chain of evidence” situation with recordings from individual computers uploaded to the cloud, being retrieved and then processed by other people on different machines, [and] also copies uploaded to transcription services—[I] still get a bit dizzy thinking about it.³⁷

But the same survey-taker also added this tantalizing prediction about the cloud-based nature of remote oral history interviewing:

In a way, I can see projects moving a little quicker. Or at least, processed quicker from the recording phase to some kind of output. It feels like the audio is seamlessly in the system when you record remotely and the files can be accessed/worked on more easily.³⁸

Regardless, in order to be successful, it is vital for a remote oral history project to have a focused project manager who institutes proper training of team members and consistent, clear communication with all parties involved. The next chapter offers rich food for thought on how to prepare interviewers and narrators for recording meaningful interviews in remote environments.

Notes

- 1 Dianne Reyes, email message to BUIOH staff and students, March 5, 2020.
- 2 Linda A. Livingstone, email message to Baylor University (BU) family, March 11, 2020; Livingstone, email message to BU family, March 16, 2020; Livingstone, email message to BU family, March 23, 2020.
- 3 “OHA Principles and Best Practices,” adopted October 2018, Oral History Association, <https://oralhistory.org/principles-and-best-practices-revised-2018/>.
- 4 For an in-depth look at transcription, see Teresa Bergen, *Transcribing Oral History*, *Practicing Oral History* (New York: Routledge, 2020). Another great resource is BUIOH’s *Style Guide: A Quick Reference for Editing Oral History Transcripts*, which is accessible on BUIOH’s website, <https://library.web.baylor.edu/oralhistory>, under “Oral History Resources.”
- 5 One free option is OpenAI’s open-source platform, Whisper. To learn more, visit <https://openai.com/research/whisper>.
- 6 Examples of both an interview abstract and an audio index/audio log can be found in the appendix.

- 7 Oral History Metadata Synchronizer, www.oralhistoryonline.org.
- 8 A contract BUIOH uses with its student transcribers is located in the appendix.
- 9 For ideas on how to enhance a virtual or hybrid training session, see Kym Price, “10 Ways to Make Virtual and Hybrid Onboarding a Success,” Zoom Blog, August 31, 2021, <https://blog.zoom.us/10-ways-to-make-virtual-hybrid-onboarding-a-success/>.
- 10 Alisha Babbstein, “A Community Connecting during a Pandemic: Case Study for *Oral History at a Distance*,” case study, Portland, OR. (Located in Section II.)
- 11 Baylor University Institute for Oral History, “Oral History at a Distance” Webinar Survey, Spring 2022. The quantitative findings from the survey are included in the appendix, while the full survey results are available on this publication’s companion website, <https://library.web.baylor.edu/oralhistoryatadistance>.
- 12 Yolanda Hester and Chinyere Nwonye, “Pivoting in Crisis: The Arthur Ashe Oral History Project at UCLA,” case study, Los Angeles, CA. (Located in Section II.)
- 13 The 1947 Partition Archive is a global oral history project that has been managed remotely since 2010 and has so far collected nearly ten thousand interviews. Their website contains excellent examples of information, guides, and tips that oral history projects can put together for interviewers. See www.1947partitionarchive.org/. The “Oral History Documents” link does not always appear on their website, but these documents can be accessed by typing “Oral History Documents” and “1947 Partition” into your search engine.
- 14 Babbstein, “A Community Connecting during a Pandemic,” case study.
- 15 Hester and Nwonye, “Pivoting in Crisis,” case study.
- 16 BUIOH uses an in-house style guide based on *The Chicago Manual of Style*. It is available for free on our “Resources” page, located at <https://library.web.baylor.edu/visit/institute-oral-history/resources>.
- 17 Lane Lambert, “Managers, Here’s How to Bond with New Hires Remotely,” *Harvard Business School*, August 13, 2021, [https://hbswk.hbs.edu/item/managers-heres-how-to-bond-with-new-hires-remotely?cid=spmailing-33601563-WK%20Newsletter%208-18-2021%20\(1\)-August%2018,%202021](https://hbswk.hbs.edu/item/managers-heres-how-to-bond-with-new-hires-remotely?cid=spmailing-33601563-WK%20Newsletter%208-18-2021%20(1)-August%2018,%202021).
- 18 Caroline Ceniza-Levine, “New Survey Shows the Business Benefit of Feeling Heard—5 Ways to Build Inclusive Teams,” *Forbes*, June 23, 2021, www.forbes.com/sites/carolinecenizalevine/2021/06/23/new-survey-shows-the-business-benefit-of-feeling-heard--5-ways-to-build-inclusive-teams/?sh=742559635f0c.
- 19 Steven High, “Bridging Distance in Project-Based Research: The Cases of ‘Montreal Life Stories’ and ‘Deindustrialization and the Politics of Our Time,’” case study, Montreal, Quebec, Canada. (Located in Section II.)
- 20 For a good starting place, see Rebecca Knight, “How to be Good at Managing Both Introverts and Extroverts,” *Harvard Business Review*, November 16, 2015, <https://hbr.org/2015/11/how-to-be-good-at-managing-both-introverts-and-extroverts>.
- 21 Erica Dhawan, “Managing Introverts and Extroverts in the Hybrid Workplace,” *Harvard Business Review*, August 19, 2021, <https://hbr.org/2021/08/managing-introverts-and-extroverts-in-the-hybrid-workplace>.
- 22 Kristen M. Shockley, Tammy D. Allen, Hope Dodd, and Aashna M. Waiwood, “Remote Worker Communication During COVID-19: The Role of Quantity, Quality, and Supervisor Expectation-Setting,” *Journal of Applied Psychology* 106, no. 10 (October 2021): 1475, <https://doi.org/10.1037/apl0000970>.
- 23 Shockley, Allen, Dodd, and Waiwood, 1468.
- 24 For more recordkeeping guidance for an oral history project, see Nancy MacKay, *Curating Oral Histories: From Interview to Archive*, 2nd ed. (Walnut Creek, CA: Left Coast Press, 2016), 50–4.
- 25 Judy Hughes, “Oral History at a Distance: A View from Australia,” case study, Melbourne, Australia. (Located in Section II.)

- 26 An example of this form is in the appendix. If a project is mailing items to narrators, it should generally only send items that it would be okay not getting back.
- 27 BUIOH uses Express Scribe for transcript-related work and sends the following to students working remotely: the executable file, installation directions, the registration code, and instructions for selecting preferred settings.
- 28 When signing up for a cloud account, be sure to select a plan that includes plenty of space for the large media and image files your project will generate.
- 29 BUIOH, “Oral History at a Distance” Webinar Survey.
- 30 Chapter 6, “Remote Recording Technology,” covers naming conventions from an institutional perspective.
- 31 In January of 2022, BUIOH executed a plan to go completely digital with the processing of interviews, and now all of these materials are in digital form and kept in the cloud alongside the original recordings and subsequent transcripts.
- 32 BUIOH, “Oral History at a Distance” Webinar Survey.
- 33 See the appendix for the email we send narrators when asking them to review transcripts.
- 34 Angham Abdullah, “Talking through Windows: Interviewing Syrian Refugees in a Pandemic,” *Oral History Society Blog*, February 26, 2021, www.ohs.org.uk/regions/wales/talking-through-windows/.
- 35 Kimberley Moore, “Hitting Pause and Hitting Record: Remote Interviewing with Zencast,” *Oral History Review*, June 5, 2020, <https://oralhistoryreview.org/podcasts/remote-interviewing-with-zencast/>.
- 36 Allie R. Lopez, email message to author, June 13, 2022.
- 37 BUIOH, “Oral History at a Distance” Webinar Survey.
- 38 BUIOH, “Oral History at a Distance” Webinar Survey.

5

INTERVIEWING AT A DISTANCE

Stephen M. Sloan

As seen through the first four chapters, many aspects of practicing oral history change in the shift from face-to-face to remote projects. However, there is no aspect of the methodology where this shift is more fully felt than in the interview itself. The relationship between the interviewer and narrator—underpinning the ultimate success of the oral history—is fundamentally changed with the increased social distance between participants. Rather than argue the false dichotomy of which is better or worse, this chapter will instead focus on the pros and cons of working with narrators to conduct interviews in a remote environment.

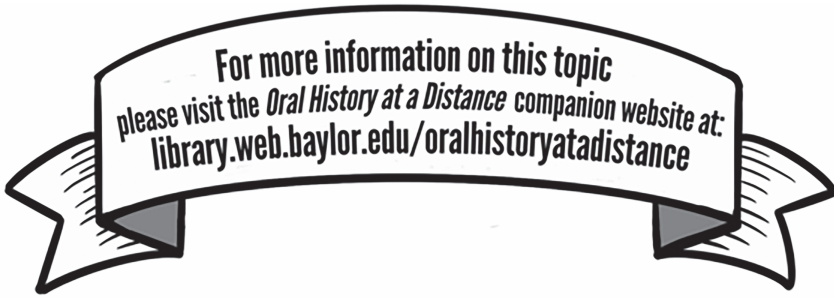
Practitioners have long argued the qualities of the oral history interview that make it distinctive. It is a long-form, recorded exchange that privileges open-ended questions and embodies a collaborative approach between oral historian and narrator.¹ When done best, interviewers listen closely, quietly, and actively. They are judicious in the ways in which they insert themselves into the interview. Oral historians frame the interview space and seek to connect with narrators to relate aspects of the participant's firsthand experience, gathering not just content on research topics at hand but exploring the meaning and significance of these for the narrator with an eye toward broader understanding. Oral historians can also strategically use silence to allow space for narrators to extend or nuance their descriptions. They also employ well-informed follow-up questions to fully investigate research topics. Interviewers should push back against generalizations and stereotypes in order to understand the narrator's perspective, worldview, and experience. They also avoid asking leading questions while fully pursuing their research aims through gathering elaborations, examples, and rich descriptions from the narrator.

The Interviewer/Narrator Relationship

It was well into my extended face-to-face oral history interview with Mary Ellen Weathersby Pope when it happened. A centenarian, there was little that slipped past her in each exchange between her, the narrator, and me, the interviewer. I glanced down quickly to see if my Marantz audio recorder was capturing good audio at adequate recording levels. As my eyes briefly panned down for an instant, she stated, “You falling asleep?” I recall vividly her hyperawareness of what was going on with me during the oral history. She was reading my nonverbals, and these perceptions were connected to how she saw me engaged, or unengaged, in the exchange. In my many years of face-to-face interviewing, I have also noticed an often-unanticipated bond that develops between interviewer and narrator, especially over the course of conducting a life history or a long series of interviews with the same narrator. Upon completing our multiyear, twenty-three-interview series on his life and career, former Baylor University Coach Grant Teaff asked me, as I prepared to leave, “So, you coming by next week?”² After all he had shared and what had passed between us, a cultivated rapport had developed through our time together. It seemed that to break off the relationship abruptly would betray our attachment. As my time with Mrs. Pope and Coach Teaff both demonstrate, there is a lot that passes between oral history interview participants, much more than merely the recollections of the narrator. In going remote with practice, the increased distance introduces new qualities to these relations and surely reshapes the attributes of what is exchanged.

Remote Relationships

Researchers conducting interviews through distanced frameworks have, in the past, routinely commented on the ways in which the greater social distance can alter the relationship between interviewer and narrator. In their qualitative interview projects utilizing Skype in the UK in the mid-2010s, sociologists Lo Iacono, Symonds, and Brown noted that, because they could not share the space with participants, “We lost a bit of the social contact and the energy from the other person. When interviewing someone in person, just the act of making them a cup of tea or coffee, for example, can create a connection.”³ As they observed here, some of the changes in the interviewer-narrator relationship that come with greater social distance may be small but can still be profound. In our webinar follow-up survey of those who had switched to distance interviews since March 2020, one respondent noted their disappointment at not being able to give the traditional gift they always provide to narrators: a floral lei.⁴ In the quick jump to distance oral history for interviewing, some failed to fully realize the ways in which remote work places the narrator and the interviewer in distinctly new environments and the implications of this for the oral history relationship. The new configuration places each participant in novel contexts.



Narrator Environment

For remote oral history work, it is a given that the narrator is placed in an environment quite different than they have traditionally experienced in face-to-face interviews.⁵ Although they still may be physically in the same setting, such as their home, the space that they occupy during the distance interview itself makes it a quite different context with some important new qualities.

Although this has been much more discussed from the interviewer standpoint, distance work can present a significant time and cost savings for the narrator as well. This can be true in a variety of ways, from the time it takes to prepare their home to host the interviewer or the time and cost to travel to the interview at a designated location. This is something that has not often been fully considered by project planners but becomes more evident with remote alternatives.

One issue that often comes up in discussions of remote oral history is narrator concerns about privacy and security during online interactions. This apprehension has been fed by internet users' growing general concern about the confidentiality and anonymity of online activity as methods to access and track personal information have increased in sophistication and application.⁶ In this remote or less intimate configuration between interviewer and narrator, there can be real concerns about who is listening in or who will listen to the interview. Therefore, interviewers should take steps to use and configure recording technology to increase security and enhance privacy, and they should find ways to communicate this in accessible terms to their narrators to reassure them of confidentiality. One simple step in this regard can be letting participants know that the online recording will only be stored locally and not kept in cloud storage.

An additional important change that comes to the narrator environment in remote oral history is participants now are required to operate recording equipment. In several ways, the qualities of their setup and connection, and their ability to manage each, can significantly impact the recording and the interview dynamics. There is a level of dependence now on the narrator's technological proficiency, even in circumstances where there is click-and-speak

access to an interview platform for videoconferencing. Despite the expanded experience generally with such platforms, researchers often note that familiarity and comfort with distance recording is still a real issue with some narrators. In face-to-face recordings, of course, the interviewer retained almost complete control of both the selection and use of equipment, but now these are topics that must be entered into more fully to set up and run the recording.

Along with new equipment and platforms, videoconferencing relies heavily on a robust internet connection. The issues of bandwidth, lagging internet, and connection quality impact the fidelity of the recording, as will be examined in Chapter 6, “Remote Recording Technology,” but for our concerns we must also consider the ways in which these issues play into the interviewer-narrator relationship.⁷ A bad connection and unfamiliarity or discomfort with the platform can amplify the remote nature of the project.⁸

Even an element such as silence, which has always played an important part in the interview for the interviewer and narrator, can be much more challenging to interpret and navigate online. As oral historian Alexander Freund notes, silence can mean many different things for narrators. Some of these are obvious to interviewers, others quite obscure. Freund writes, “Silences may express individual or collective forgetting, collaborative remembering, discomfort, reluctance, (self-)censorship, noncompliance, confrontation, reticence, politeness, fear, anger, deceit, taboos, secrets, contemplation, concern for the other, reflection, conformity, or that which need not be told.”⁹ In an online environment, the nature of the silences suggested earlier can be a much harder read for the interviewer. In addition, silences can take on new meanings for the narrator as well. One academic study by a group of German communications experts noted that a delay can be read by the narrator in a host of ways. When compared to others, an online participant with even a slight delay in speaking was rated to be “less friendly, less active, less cheerful, less self-efficient, less achievement-striving, and less self-disciplined.”¹⁰ Therefore, we work to limit unintended silences through good equipment and a reliable connection, but we still work to probe the more meaningful silences Freund highlighted as they emerge in the interview.

For the narrator environment, it is incorrect to assume that narrators have good spaces from which to videoconference. Besides the issues of connectivity and equipment, a lack of privacy can come from recording in a home or workspace.

Sometimes during the COVID-19 pandemic we needed to move interviews online in the middle of a multi-interview oral history. This required the narrator to acquire/adapt to a new set of skills, both technical and interpersonal, in the remote environment. Can the narrator support remote work on their side? What are the advantages and disadvantages in working with this particular narrator in their new context? It can be right for some and not for others. If a suitable space can be found, the visible copresence of the interviewer

does make a difference for the narrator. As Susie Weller noted in her study, good quality video brought a “temporal and emotional connection . . . that was salient in determining the richness of the interaction.”¹¹

For many narrators who partner with oral historians to do interviews in a remote context, the distanced arrangement can be empowering. It gives added flexibility in scheduling and rescheduling and also provides an exchange from which they can easily disconnect if they decide to. As one oral historian related in our survey of distanced interview practices, “The interview environment is on their [the narrator’s] terms, which results in them feeling extremely comfortable and prepared.”¹²

Interviewer Environment

To adapt existing or initiate new oral history interviewing projects, it is also important for the interviewer to realize the attributes of the new environment they operate from in a remote setting. Significant here and related to the discussion earlier, the new interviewer context notably diminishes their ability to address issues with the narrator’s environment. This can include the ability to limit or reduce distractions for the narrator or alter the setup to improve the quality of the recording. In their distance project conducting qualitative interviews, one research group of doctoral students taking a qualitative methods course highlighted their diminished ability to speak or address environmental distractions for participants in their project as a significant challenge. In their case, this included interruptions, home-privacy issues, and unreliable internet connections.¹³

Although the interviewer has less ability to address narrator issues, their environment in remote work allows them to mitigate risks that may have been encountered in traditional face-to-face fieldwork. This could be the issue of interviewer safety, where research might take them to settings and situations that might be potentially hazardous, such as sites with political instability or violence. Often, in working with student projects, ensuring a recording location comfortable for the interviewer as well as the narrator can be challenging. Of course, interviewing during the COVID-19 pandemic highlighted the concerns that contact can sometimes bring in terms of health risks, so distance interviewing is a useful tool to address this.

Along with mitigating risk, the new interviewer environment can also provide a softer introduction of an interviewer to a narrator or a community of narrators. In other words, not being copresent is inherently less invasive for the narrator. In some cases, this provides a much lower threshold of commitment for the narrator to agree to participate in the oral history. For Kelsey Roach, a PhD student in curriculum and instruction, a remote oral history project was the ideal approach to initiating her research exploring the approaches and frameworks of Indigenous educators. Her recruitment of

narrators and work with participants would have been much different if the access requested had included coming onto tribal land to conduct the interviews.¹⁴ So for some oral historians, this more subdued introduction could be critical for project success.

An additional challenge in distanced oral history work that the new interviewer environment presents is securing the necessary forms and the narrator's signed consent for the oral history. In a distanced format it seems that this has been a much greater challenge than with copresent interviews. Although oral historians have often obtained consent after the interview, the findings from our webinar follow-up survey suggest that it may be beneficial to shift to the practice of securing rights to use the interview before the recording begins.¹⁵

For the interviewer working with a narrator remotely, their new environment offers, quite literally, a limited view. Whether on the telephone or videoconferencing, less contextual data on the narrator and their environment is available to the researcher. Several oral historians who have moved from face-to-face to distance interviewing note, of course, the loss of personal touch and the challenges of reading body language as effectively as they did in the more traditional configurations. There is value in observing the narrator's setting or, across a project, multiple narrators' environments. For oral historian Leonard Cox, moving to distance interviewing had a significant impact on the general observations he usually includes with his interviews. In face-to-face settings, he would record "vivid field notes from noticing the sky the day of the interview to a grandmother's photograph on a kitchen wall."¹⁶ For sociologist Ann Oberhauser's research on gender and home-based economic strategies in Appalachia, the fieldwork with women was about the opportunity "not just to observe, question, and then leave, but to engage with them on their own terms, in their own space."¹⁷ For distance interviews, both the interviewer and narrator now occupy a more liminal space. In this new "place" for the interview, the interviewer will need to work harder and seek other, creative ways to gather and benefit from the information that came just by sharing the same space in copresent interviews.

Before exploring the dynamics of interviewing in a remote setting, it is important to pause to reflect on the means of interface used in your oral history project and the ways in which the chosen method of connecting may impact the exchange. As media theorist Marshall McLuhan penned many years ago, "The medium is the message," signaling a reminder to study the vehicle through which information is being communicated as a critical element, as opposed to just examining the messages carried.¹⁸ Therefore, before we turn to discussing interviewing, or gathering responses, it is valuable to consider the mediums of videoconferencing and the phone once again, not from a technological standpoint but from the ways in which they act as intermediary between interviewer and narrator.

More Technology, New Dynamics

Much of the existing literature on oral history remote interviewing to date has focused on the best technology to use for recording. However, it is equally important to realize the central place distance work provides new technologies as the intermediary between participants as they operate in remote contexts and the way in which the medium shapes interview dynamics. The platform is not just a means of recording but a new portal through which the interviewer and narrator see and interact with one another. Recording technology, of course, has always had a central place in oral history, and the adoption of new technology to capture sound and audio is what made the modern oral history movement possible. As a result, oral historians have long thought about the role of technology in the relationship between interviewer and narrator. A story from my own experience illustrates this point. It was back in October 2007 when I set out to conduct an oral history interview with longtime Waco florist Harry Reed.¹⁹ I was excited about the interview, and although I would be doing audio recording, I knew I needed other tools to document Reed's story. I grabbed the still camera to take some pictures of Mr. Reed at the time of the interview, I took a flatbed scanner to create digital images of historical photos that Reed may have, I took my laptop computer to use with the scanner, and I took my digital audio recorder. As I was leaving the office, I had second thoughts about how much technology to insert initially into this exchange. I ended up using them all but introduced them over time and contextualized the role of each item.

In the realm of recording technology, oral historians have long considered which technologies were the right choice for their projects and how much technology the design of their project called for in their relationship with narrators. For oral history at a distance, the options have settled into two primary frameworks for the interview: telephone-based or videoconferencing-based interviews. As we reconsider each platform, key here for this chapter is to interrogate the ways in which they impact the dynamics of the oral history interview.

Interviewing via Telephone

The Vietnam Center and Archive at Texas Tech University has always conducted interviews remotely, by telephone. Project head Dr. Kelly E. Crager²⁰ offers his reflections on his many years of experience conducting telephone-based interviews with veterans of the Vietnam War in a case study included in the second section of this book. In this piece, he notes the many reasons why he has chosen to utilize this mode of interviewing and why it works best for his oral history project. Through detailing the associated benefits and challenges that come with the approach, Crager gives us reasons to weigh

the phone as an option for doing oral history. For Crager, the cost and time savings and increased reach in going remote loom large in choosing this alternative, of course, but he also stresses other benefits. In the race against time to interview veterans, Crager notes the accelerated pace of work that the telephone enables and the fact that it uses a technology so familiar to his narrators. He acknowledges the challenge of having no nonverbal cues between the oral historian and narrator and the fact that it makes detailing more emotional content more difficult for the participant via the phone.²¹

Crager's case study goes on to highlight additional pros and cons of telephone-based oral histories.²² Because of the long history of using this technology, there is a much deeper literature on the issues that recording oral history over the telephone presents. Many of the especially insightful studies relate to telephone-based surveys. In her work breaking down the approach in 1990, Glynis Breakwell noted some of the attributes of telephone interviews that she had experienced in her research. For surveying work, she noted few differences in distance surveys over face-to-face interactions, although her research indicated that individuals were more frank, especially in regard to personal matters, on the phone. As a project manager, she also highlighted the advantage of distance work enhancing the ability to centralize data gathering for an initiative.²³

While noting several of the characteristics of telephone-based interviews for surveying, Breakwell also includes some important drawbacks to the method that oral historians should take special note of. The long form of oral history may be a challenge via the telephone as she maintains that telephone interviews were more acceptable to participants if they were restrictive in length (about fifteen to twenty minutes). Also, of note here is that open-ended questions, privileged by oral historians, generally garnered condensed responses over the telephone. In their responses, participants generally talked at a quicker pace and avoided silence. For most respondents, complex questions, or those with a large number of response options, were much more difficult to field via telephone than they would have been face-to-face. Breakwell advises that interviewer "questions should be structured with this in mind."²⁴

The upside: using the phone for oral history offers a tried-and-true technology deeply familiar to narrators that also has highly reliable connectivity. Although not widely embraced by oral historians, it has been employed in interview settings since the 1970s and 1980s.

Interviewing via Videoconferencing

For most oral historians, the move to distance recording means a primary reliance on online videoconferencing platforms. This, of course, introduces a host of additional considerations through also now employing and documenting the moving image. For decades, oral historians have weighed the

benefits of using audio and/or video as a mode of recording. Historically, when assessing this choice in face-to-face interviews, considerations have included everything from the comfort of the narrator with video to logistical issues such as staging, additional skill sets required, the format and size of produced video files, and the significantly higher cost. These costs included not just additional equipment and staffing for the interview but the added costs of preservation. As oral historian Doug Boyd noted back in 2012, “I know well that as a general rule, I can structure an oral history project to conduct ten audio interviews for the cost of one professionally recorded video interview.”²⁵ Despite these issues, some truly impressive oral history work has been conducted with video since the 1970s, but audio continued to retain its primary place as the medium for oral history recording for these reasons and others.

However, the quantum leap to remote oral history that the COVID-19 pandemic initiated has dramatically increased the volume of video-based interviews being conducted by oral historians worldwide. The ascendancy of video-enabled VoIP (Voice over Internet Protocol), such as the popular video-conferencing platform Zoom, as a communication option quickly overcame many of the traditional barriers to include video in the work of oral historians.²⁶ It was immediately more easily staged and operated in an environment where participants became more accustomed to seeing themselves on video. The costs were instantly lowered, and cloud solutions even provided easy online storage of recordings. Although video now comes much easier, it is a dramatically different view.

The lens, or window, of the videoconferencing view is remarkably different than the standard setup utilized by oral historians in traditional face-to-face oral history video. This is true for the ways in which the field of view is framed and what is and is not included in the shot. A standard videoconference participant window is shot with the participant’s face and upper chest centered. In traditional oral history videography, however, the rule of thirds was often employed in the placement of narrators. The rule of thirds placed the center of the narrator’s face within the left or right third of the frame and left the other two thirds of the field of capture open. For the viewer, the rule of thirds “creates a sense of perspective and intimacy that is often lost with a straight-on, centered shot.”²⁷ Video shot in traditional face-to-face assumed the presence of a viewer or an audience outside of the immediate exchange with the interviewer, and it delivered a more compelling and well-composed arrangement. It established a relational angle between the narrator and the future audience who would view the media.

A significant change in the nature of the video here is also the fact that the interviewer is included in the video record as well. Standard in videoconferencing, this would have been a rare occasion in traditional oral history videography. Videoconferencing now includes additional data about the

interviewer, usually off-screen in prior circumstances. Some researchers have noted the value of this additional data as now we have more documentation of the interviewer, about whom less is usually known during the interview. Digital media and video composition specialist Crystal VanKooten argues that including both participants in the frame affords a more accurate representation of the exchange. Video that involves a view of both parties reveals the “conversational link” and better reflects a “methodology of interdependence” that takes place during the interview.²⁸

Not only does videoconferencing present oral historians with a new frame through which they view and interact with their narrator, but, as seen earlier, the nature of the new window also allows participants to see themselves as well in real time through their device. This is a truly novel environment for both narrator and interviewer. Experience and research have shown that real-time monitoring of your own presence in the interview can influence the focus of both individuals during the oral history. As writer Meghan O’Gieblynn noted, our relationship with video-based platforms such as Zoom offers participants

not an ordinary mirror, or even an ordinary digital mirror. The self that confronts you on these platforms is not the static, poised image you’re accustomed to seeing in the bathroom vanity or the selfie view of your phone camera . . . but the self who speaks and laughs, gestures and reacts. . . . [We’re] obliged . . . to see our looks of dismay, our empathetic nods, our impassioned gestures, all of which appear so different from how we imagine them, if we imagine them at all.²⁹

Before videoconferencing it was just so unusual to get this sort of glimpse of self, and psychologists have noted that we seem to be endlessly fascinated with this particular view of ourselves.³⁰ This phenomenon is true for narrators and for interviewers, now observing themselves as well as observing the other participant. There is also evidence that this phenomenon of viewing the self or, as others have called it, self-objectification has an impact that may be gendered. Studies indicate that the more time women spend focused on their appearance during videoconferences, the greater their levels of Zoom fatigue and cognitive taxation become.³¹

This is a propensity that researchers have been aware of for decades, and, while an oddity for the general population, it has special implications for the work of oral historians. As we privilege being deeply engaged with tracking the experience of the narrator during the oral history interview, we must be aware that there will be a pull, or tendency, to watch ourselves on-screen. Despite this tendency, it is best practice for the interviewer to keep video on during the oral history interview, as some research indicates much greater participant engagement among speakers with their video on.

Although the self-view window can be disabled in most videoconferencing platforms, it seems few users made an active effort to disable this view of self while still projecting their video feed to other participants. For most, the “self-view window acts as an easy self-check, providing a sense of security, and as a reminder of one’s manners in front of the camera.” Most did not know that you can turn this self-view off.³²

The visual element, of course, is the key strength of videoconferencing as a tool for oral historians. In a survey of whether individuals preferred using video with online conferencing or operating with video off, findings showed that “the presence of video seems to be important mainly for maintaining connections rather than improving communications.”³³ We know from the depth of research done through online instruction that users are significantly more engaged when they have their cameras on than when they have them off.³⁴

In weighing the merits of this new view through videoconferencing, social geographer Susie Weller and others have maintained that the configuration of participants in remote oral history via video arguably offers a more intimate arrangement than the traditional arrangement of an interviewer and narrator in person. Weller notes that the videoconferencing lens is more reflective of what sociologist Erving Goffman called the eye-to-eye ecological huddle. This he defined as a framed, focused gathering of participants with “a single visual and cognitive focus of attention . . . that maximizes each participant’s opportunity to perceive the other participants’ monitoring of him [or her].”³⁵ Some commentators on distance oral history have agreed that videoconferencing provides a prolonged arrangement toward one another that would be unusual or uncomfortable in a copresent configuration. As one respondent noted in the “Oral History at a Distance” webinar follow-up survey, “At times I felt that the ‘intimate distance’ created by the computer screen aided rapport and comfort.”³⁶ So, videoconferencing is a remote view but one that is configured, to borrow this phrase, as an intimate distance. Weller argues that, for some remote interviews, then, “mediated forms of communication can facilitate a more intimate connection and a feeling of close physical proximity, conducive to the building of rapport.”³⁷ The reality of what connection can be established via participants in a videoconferencing setting explains the reasons why it has dramatically expanded in use where the telephone has never been broadly adopted by oral historians. It may also help explain the common fatigue that can set in with videoconferencing because of the closeness of the connection. In their study on exhaustion and fatigue in Zoom-based videoconferencing, communications experts highlighted that videoconferences maximize elements that are sometimes avoided in face-to-face interactions: “long periods of eye contact, large/close-up views of faces, and faces staring at you even when you are not speaking.”³⁸

Conducting Interviews at a Distance

After considerations of the new environments for narrator and interviewer and some discussion of the medium through which narrator and interviewer connect at a distance, the dynamics of conducting an interview at a distance can now be explored. These key elements discussed are reflective of the many ways in which the pacing and character of the interview have shifted with remote oral history. One thing to keep in mind, however, are certain cases where interviewers who work at a distance will see fewer changes from working face-to-face to going remote. In Charlie Morgan's case study on distance oral histories recorded by the National Life Stories project in the British Library during the COVID-19 pandemic, he reflects on the sorts of interviews that seemed least changed in moving from face-to-face to remote. He noted that "it is easier to conduct a remote interview with someone you already know, or where it is a more focused interview compared to a life story."³⁹ This suggests additional criteria that may make remote interviews more distinct from copresent exchanges: a new narrator or a more in-depth interview.

Pre-Interview Connection Creativity

After we have introduced our oral history project to participants and they have agreed to participate, it is time to begin building connections with the narrator. The absence of face-to-face contact between the interviewer and narrator necessitates that interviewers get creative and take other approaches to building rapport and relationship. One key advantage in this regard is that the distance format makes it much easier to facilitate pre-interview contact and interactions than face-to-face formats often provide. In the evolution of their Principles and Best Practices, the Oral History Association (OHA) has increasingly emphasized the importance of a pre-interview with the narrator. In many projects, however, this unrecorded, informal meeting has often been a logistical or financial impossibility for many in-person projects to actually accomplish.

OHA guidelines encourage the pre-interview to provide the opportunity for the interviewer to review the purposes and procedures of the project, gather additional narrator background information, and begin the process of informed consent for the narrator.⁴⁰ Scheduling and conducting a pre-interview meeting with the narrator is much easier via distance, and it provides an occasion to begin establishing rapport and allows for a preview of the recording landscape, such as the technology setup or the home recording environment, that the interviewer will be working with during the oral history interview.⁴¹ This session can also be a chance to address the narrator's expectations for the interview and perhaps explain the framework of the interview and project. For distance interviews, it is also valuable here to

distinguish or frame the formality of the oral history as a research exercise, as a way of emphasizing the special ways in which this meeting will be different from other online video or telephone calls.⁴²

With copresent relationship building set aside, oral historians will need to build trust and rapport in new ways during the pre-interview. Flexibility will always be necessary to make the interview process a positive experience for people sharing their stories. In their early remote online-based interviews, researchers Hannah Deakin and Kelly Wakefield incorporated a round of email exchanges prior to their Skype sessions to build rapport with their narrators. In their experience, the virtual framework established with the narrator in advance of the interview “allowed information to be exchanged and a connection to be developed.”⁴³ They argued that these additional interactions would not have taken place had the interviews been conducted in the standard face-to-face fashion.

The Role of the Device

For videoconferencing, with the computer or smartphone as intermediary, it is especially important to clearly define the role that the device should and should not take in the oral history. Since computers and smartphones are used for a host of applications outside of oral history, the narrator’s existing relationship to the device can come with some assumptions that complicate their understanding of its use for a formal oral history interview. For example, the narrator might be inclined to search the internet during the interview to verify facts, spellings, or dates. Case in point, when historian Amy Achenbach asked narrator Julie Todaro for the names of certain Girl Scout Camps during a Zoom-based interview, Todaro wanted to be accurate in her response. After a pause to consider, Todaro provided the following response as noted in the transcript: “You know they still have them. I can look it up. (typing on the computer)”⁴⁴ Most of us are accustomed to using digital devices to access, clarify, or confirm knowledge, so it was natural to employ the computer as a reference. However, as you can imagine, this could be problematic for the goals we are pursuing in an oral history interview as the narrator may move away from their own thoughts or responses and incorporate online data.

It is important, therefore, for the interviewer to define or clarify the role that the device should serve throughout the interview. Even if using the device is second nature to the narrator, the use of it for oral history is quite novel. It may be a device to share information but should not be seen by the narrator as a vehicle to search for or supply information during an interview. Pre-interview conversations should include researchers and/or project planners outlining the nature of the information they are seeking to gather on their project—principally the experiences, perspectives, and opinions of the

narrator. In the past, the interviewer has generally established and managed the technology during the interview, but now the narrator often has that access as well.

Attention

Related to the dynamics of new devices in interviewing remotely, oral historians should be aware of the ways in which attention or focus may operate in a distance exchange. There are new elements to be considered here that impact the experience of the narrator and the work of the interviewer. Respondents to the “Oral History at a Distance” webinar follow-up survey noted that narrators tended not to fully set aside both the time and mental energy to focus on the interview to the extent usually brought to face-to-face interviews.⁴⁵ The flip side of remote interviewing, that this process provides the narrator more flexibility and control over the conversation, means there can be more narrator distraction or diminished focus on interviewer questions. Framing the interview well for the narrator is key here to increase focus, and close listening and direction in questioning are important to ensure the oral history meets the research objectives.

For the interviewer, however, distance interviewing means that their own actions during the exchange can become much less distracting for the narrator. Checking the time, verifying recording, taking notes can all be done without disturbing the narrator or sending mixed messages to them through nonverbal actions. Some freedom results from distance between the narrator and the interviewer. This has often been cited by researchers who prefer telephone-based interviews. The telephone affords a freedom of movement to both narrator and interviewer. In her article on COVID-19 work with oral history, Anna Kaplan relates a story of oral historian Benji de la Piedra embracing this novel liberty to move: “Unconfined to a seat, he was able to pace the room during ‘the more reflective parts, or the parts where I’m asking questions from a more intuitive place,’ but returned to a chair or sitting on the floor when taking or referring to his notes.” Although this will not always be the case for oral historians working remotely, it does suggest the possibilities of listening techniques that move beyond the traditional stillness of the body.⁴⁶

Candor and Sensitive Topics

To date, research on whether a narrator is more open or candid in a face-to-face versus a remote interaction has provided mixed conclusions. Some early research on telephone-based interviews found that those who participated in quantitative telephone interviews were more likely to “censor their answers to questions in order to protect themselves.”⁴⁷ In the modern age, this can be

compounded by the concerns of online surveillance and the fact that, when copresent, the immediate audience for the oral history is much more defined than the perceptions and realities present interacting online.

Other researchers, however, maintain that as individuals have become more attuned to virtual communication, remote candor is becoming less of an issue. Some phone-based researchers have long maintained that their approach generates more honest data. Although professional opinions conflict on the issue of candor, it is clear that building rapport and trust with the narrator is important to create a space where they can be frank during the interview, especially regarding sensitive topics. In their early, large project studying drug use among college students, researchers found significant and consistent difference between in-person and telephone responses to substance-use questions. Their results suggest that, at the time and under the circumstances of those interviews, in-person narrators were more likely to report using multiple substances.⁴⁸

In reflecting on their interview experiences with traumatized nurses, researchers Meredith Mealer and Jacqueline Jones found that exploring sensitive topics within the population they studied remotely offered an “avenue for a rich, in-depth exploration of meaning in the context of vulnerability that should be considered a primary rather than additional approach for qualitative study.”⁴⁹ They argue that the emotional distance of a non-present interviewer was helpful for narrators in discussing trauma. For them, the power differential between researcher and participant “can be ameliorated through virtual space.”⁵⁰ This study echoes older research as well. In Stephen Dunham’s educational research, he found that even though rapport was more difficult to establish at a distance, “the subject may feel less threatened, particularly if the subject matter is of a sensitive nature.”⁵¹ Despite conflicting studies, there seems to be ample evidence to suggest that dealing with sensitive topics at a distance may have some real advantages.

Timekeeping and Recording

As an oral historian, I am often very aware of clocks. From hearing them ticking in the background of the recording to using them to monitor the length of an oral history session, timekeeping is one more of the interviewer’s responsibilities that the narrator needn’t worry about. When designing our space for copresent interviews at the Institute for Oral History (BUIOH), we placed the clock where it would be visible to the interviewer, not the narrator. With distanced interviews, however, both narrators and interviewers are now much more aware of time during the interview. In videoconferencing, the utilitarian features of the computer lens offer an ever-present reminder of the current time. As the participant gazes into the screen, the time is a constant reminder at the top or bottom right of the window in most platform configurations.

It is perhaps this greater time consciousness that has led online interactions to be generally shorter than face-to-face recordings. In their qualitative interviewing project, medical researchers Krouwel, Jolly, and Greenfield conducted an in-depth analysis of the length and breadth of video calls versus face-to-face interviews in this hybrid project. Their findings indicated that in-person interviews were 33 percent longer and used 14.6 percent more words. The speech rate was 16 percent higher in video calls than it was for in-person interviews.⁵² It is true, however, that the general growing experience with online communication has increased the average length of interactions via videoconferencing. With the 2020 explosion of the use of Zoom during the COVID-19 pandemic, it was noted that the average length of a video call on the platform had grown to fifty-four minutes by 2021.⁵³ Although this was double the average length of a Skype conversation in 2015, it is still considerably shorter than most oral history interviews.⁵⁴ In the archives of BUIOH, one large sample size, the average length of an oral history recording is one hour and twenty-one minutes.⁵⁵ It is also worth noting that business applications have driven much of the growth of the average length of video calls, with the Zoom default suggesting a one-hour meeting for each interaction.⁵⁶

Like the more prominent presence of timekeeping in the interview for the narrator, there are also more evident and continual reminders that the exchange is being recorded and that there is audience beyond the interviewer for the recording. Videoconferencing platforms leave the recording light on for each participant, and connectivity issues and platform navigation offer frequent reminders. This is a shift from what was often the experience of narrators in the past, which could often feel like simply two individuals in a room talking. Interviewers should work in building rapport with the narrators to clarify and fully explain the purpose and use of the recording being created as it looms larger in distance sessions.

A Quicker Pace

Whether conducting interviews remotely via telephone or through videoconferencing, there is ample evidence that not only is the length shorter but the pace of distance recording is also quicker than it is in more traditional, copresent interviews. This observation is in tension with the slow pace and longer form that oral historians typically privilege. Slowness has been a value to oral historians. Not directly referring to distance interviewing but commenting on the rush of the digital age in general, oral historians Sheftel and Zembrzycki argued that “relationship building, interviewing, and careful analysis, all of which are at the core of oral history, take time. . . . Slowness allows us to consider the impact, context, trajectory, and implications of our work.”⁵⁷ It is important that oral historians find ways to communicate and model a slower-paced exchange for our narrators and ourselves.

A more accelerated pace means that interviewers need to come to their interview more fully prepared as they are using a format that presents less of a casual, open-ended recording. One documented phenomenon that contributes to this as well is the higher level of exhaustion that emerges in videoconferencing. During the COVID-19 pandemic, the popularity of the virtual platform and the grind of its extended use led to the term *Zoom gloom* being coined popularly.⁵⁸ So, time spent in the interview session will need to be monitored much more closely than was the case in copresent interviews.

Serial Interviews

Because of the factors explored earlier, narrators are more likely to give extended time to oral historians in person rather than online. However, the greater ease of connection through telephone and videoconferencing opens up the likelihood and promise of serial, or multiple, interviews with the narrator. Doing a series of interviews with a single narrator can bring a host of benefits to an oral history project. A progression of recordings allows for cross-checking, key follow-up questions, and greater familiarity and trust with the narrator. The added worth of serial interviews in general has long been argued by oral historians. Without additional interviews in his project on Taiwan's grassroots politicians, political scientist Benjamin L. Read maintained that he would have walked away from a single interview with "many misimpressions, half-truths, partially understood anecdotes, and missed opportunities."⁵⁹

The use of serial interviews also allows the interviewer to explore a wider range of key topics and approach them from different angles. It delivers the space within which oral historians prefer to work and gives room to learn from knowledge that emerges from one interview to the next. In fieldwork with distance interviews, this turn towards utilizing series as more of a standard seems to be happening in practice. One respondent to the "Oral History at a Distance" webinar survey noted that they organically moved to spreading out interviews with elderly narrators over a period of several days so as not to tire out their participants.⁶⁰ It is much less of an "ask" to request additional interviews from narrators and offers new ways to organize an oral history of an individual.

Less Data, Richer Texts?

As pointed out earlier, the position of the interviewer in a remote oral history setting offers a vantage point that provides fewer cues and contextual information from the narrator. As some researchers have pointed out, however, fewer nonverbal markers necessitate that what could be communicated through other methods must now be spoken. Less visual means more verbal.

This finding is a common advantage emphasized in literature examining transcripts produced from telephone-based interviews.⁶¹ As Kelly E. Crager from the Vietnam Center and Archive Oral History Project argues in his case study included in this volume, distance interviewing encourages narrators to be much more descriptive in their interviews.⁶² As the resultant text from the recording is often central in the analysis of what is gathered by researchers, Amanda Holt argues this is a real strength of transcripts produced from telephone interviews because “*everything* had to be articulated.”⁶³ For her, the medium of production produced a much richer text from which to begin analysis.

Concurrent with the age of remote recording is an era where new technologies are making it much easier to produce affordable and accurate oral history transcripts as well as new tools to analyze or explore the text created. Online recording also makes it an easier step to facilitate online transcription, and many platforms already support the creation of rough AI-generated texts from the audio or video.

Researchers who focus more strictly on the text produced from the interview for coding and analysis have noted the value of having only the data spoken in the interview. Reflecting on her use of telephone interviews, psychologist Amanda Holt argued that the

lack of “ethnographic” information derived from participants’ homes, communities, and, indeed, their “selves,” enabled the subsequent discourse analysis of data to “stay at the level of the text.” I could not add my own “contextual” data to inform my analysis, as there was not any available. I could only refer to what participants themselves “orient towards” in making analytical leaps between the material and the discursive, which is arguably preferable when conducting a critical realist discourse analysis.⁶⁴

So, in this view more data outside of the transcript is less than preferable. In other words, less data, richer texts. Although this is not the view of most oral historians, it is true that the analysis of oral history often centers primarily on the text, which can offer thicker descriptions with less reliance on the nonverbal.⁶⁵

Conclusion

Oral historians should be thoughtful and deliberate in employing remote interviews. Weighing the merits of an in-person versus a distance interview should be a consideration not just at a project level but from narrator to narrator. One survey respondent noted the mixed results they encountered in some interviews on the same project and within a similar population when they simply switched from conducting remote oral histories with city dwellers

to doing the same with rural dwellers with less internet connectivity.⁶⁶ The fact is that there will be many narrators who, for a variety of reasons, will be unable to navigate or operate within a distance recording environment. For those who will, oral historians must rise to the challenge that historian Katherine Waugh presents to us for the narrator: we must design the remote interview in a way that allows the transient space of the distance oral history “to be as comfortable and secure as possible.”⁶⁷

Not sharing a physical environment with the narrator in distance interviewing means some losses for the interviewer. There are new tests for building rapport and trust, real difficulties in gauging body language, and tracking the narrator is more of a challenge.

However, the new age of distance interviewing unlocks access to voices who might not otherwise have been interviewed or found a place in the record. It can reach more diverse narrators and expand a project’s geographical scope radically. There are also opportunities to obtain a greater depth of content remotely. The platform can provide more repeated contact with the narrator than face-to-face in an era where there is a prevalent willingness to engage in online encounters. Oral history at a distance can be more empowering for the subjects of oral history interviews, and it can be a means to extend additional influence over the research process.

As oral historians move forward, we will rely on improved connectivity, more stable internet connections, and clearer audio and video from innovative technologies.⁶⁸ For this, and a host of other reasons, oral historians should track and weigh incorporating advances in both the methods and practices for remote interviews.

Notes

- 1 The basic principles of oral history interviewing that are generally agreed upon can be referenced in the Principles and Best Practices of the Oral History Association, located at <https://oralhistory.org/principles-and-best-practices-revised-2018/>.
- 2 Grant Teaff served as head football coach at Baylor University for twenty years (1972–1992) and as the longtime executive director of the American Football Coaches Association (1994–2016). The first nineteen interviews of the oral history series occurred in his AFCA office or conference room, and the setting for the last four was his study in his home.
- 3 Valeria Lo Iacono, Paul Symonds, and David H. K. Brown, “Skype as a Tool for Qualitative Research Interviews,” *Sociological Research Online* 21, no. 2 (May 2016): 11.
- 4 Baylor University Institute for Oral History, “Oral History at a Distance” Webinar Survey, Spring 2022. The quantitative findings from the survey are included in the appendix, while the full survey results are available on this publication’s companion website, <https://library.web.baylor.edu/oralhistoryatadistance>.
- 5 For some experiential insights into what it is like to be a narrator in a traditional, face-to-face oral history interview, see Stephen M. Sloan, “On the Other Foot: Oral History Students as Narrators,” *The Oral History Review* 39, no. 2 (Summer/Fall 2012): 298–311.

- 6 Surveys show that the majority of Americans are concerned about digital privacy and the ways in which their interactions online are collected, stored, and used. See Brooke Auxier, Lee Rainie, Monica Anderson, Andrew Perrin, Madhu Kumar, and Erica Turner, "Americans and Privacy: Concerned, Confused, and Feeling Lack of Control over Their Personal Information," *Pew Research Center*, November 15, 2019, www.pewresearch.org/internet/2019/11/15/americans-and-privacy-concerned-confused-and-feeling-lack-of-control-over-their-personal-information/.
- 7 In Chapter 6, Steven Sielaff gives us several suggestions on how this can be improved, including encouraging our narrators to use a wired (rather than a wireless) connection when videoconferencing.
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- 9 Alexander Freund, "Toward an Ethics of Silence? Negotiating Off-the-Record Events and Identity in Oral History," in *Oral History Off the Record*, ed. Anna Sheftel and Stacey Zembrzycki, Palgrave Studies in Oral History (New York: Palgrave Macmillan, 2013), 223, https://doi.org/10.1057/9781137339652_13.
- 10 This was observed in connections with as short as a 1200ms transmission delay compared to a connection with no delay. See Katrin Schoenberg, Alexander Raake, and Judith Koeppe, "Why Are You So Slow?—Misattribution of Transmission Delay to Attributes of the Conversation Partner at the Far-End," *International Journal of Human-Computer Studies* 72, no. 5 (May 2014): 485.
- 11 Weller, "Using Internet Video Calls," 623.
- 12 BUIOH, "Oral History at a Distance" Webinar Survey.
- 13 Michelle M. Falter, Aaron A. Arenas, Gordon W. Maples, Chelsea T. Smith, Lisa J. Lamb, Michael G. Anderson, Elizabeth M. Uzzell, Laura E. Jacobs, Xavier L. Cason, Tiara A. N. Griffis, Megan Polzin, and Nada Z. Wafa, "Making Room for Zoom in Focus Group Methods: Opportunities and Challenges for Novice Researchers (During and Beyond COVID-19)," *Forum: Qualitative Social Research* 23, no. 1 (January 2022), <https://doi.org/10.17169/fqs-23.1.3768>.
- 14 Kelsey Roach, at the time a Baylor University curriculum and instruction PhD candidate, was researching the experiences, practices, and histories of Native American K–12 educators.
- 15 BUIOH, "Oral History at a Distance" Webinar Survey.
- 16 Leonard Cox, informal interview with author about the transition to remote recording practices experienced during the COVID-19 pandemic, November 17, 2021.
- 17 Ann M. Oberhauser, "The Home and 'Field': Households and Homework in Rural Appalachia," in *Thresholds in Feminist Geography: Difference, Methodology, Representation*, ed. John Paul Jones III, Heidi J. Nast, and Susan M. Roberts (Lanham, MD: Rowman & Littlefield Publishers, 1997), 172.
- 18 Marshall McLuhan, *Understanding Media: The Extensions of Man* (New York: McGraw-Hill Book Company, 1964), 7.
- 19 Albert Harry Reed, interview by Stephen M. Sloan, October 9, 2007, transcript, Baylor University Institute for Oral History, Waco, TX, <https://digitalcollections-baylor.quartexcollections.com/Documents/Detail/oral-memoirs-of-albert-harry-reed-series-1-transcript/2137084>.
- 20 Dr. Crager has served as the oral history project head for the Vietnam Center and Archive since January 2008. He has conducted hundreds of telephone-based interviews and teaches HIST7000: Practicum in Oral History.
- 21 Kelly E. Crager, "Interviewing Remotely: The Vietnam Center and Archive Oral History Project as a Case Study," case study, Lubbock, TX. (Located in Section II.)

- 22 Crager, "Interviewing Remotely," case study.
- 23 Glynis M. Breakwell, *Interviewing* (New York: Routledge, 1990), 84.
- 24 Breakwell, 84.
- 25 Douglas A. Boyd, "Audio or Video for Recording Oral History: Questions, Decisions," *Oral History in the Digital Age*, 2012, <https://ohda.matrix.msu.edu/2012/06/audio-or-video-for-recording-oral-history/>.
- 26 Voice over Internet Protocol (VoIP) is a technology that allows you to make voice calls using a broadband internet connection instead of a regular (or analog) phone line. "Voice over Internet Protocol (VoIP)," *Federal Communications Commission*, accessed April 7, 2023, www.fcc.gov/general/voice-over-internet-protocol-voip.
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- 30 Shira Feder, "A Cyberpsychologist Explains Why You Can't Stop Staring at Yourself on Zoom Calls (and Everyone Else is Probably Doing the Same)," *Insider* (May 3, 2020), www.insider.com/why-you-stare-at-yourself-zoom-calls-psychologist-2020-4.
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- 33 Balogova and Brumby.
- 34 Kostadin Kushlev and Adam Epstein-Shuman, "Lights, Cameras (On), Action! Camera Usage during Zoom Classes Facilitates Student Engagement without Increasing Fatigue," *Technology, Mind, and Behavior* 3, no. 3 (Autumn 2022), <https://doi.org/10.1037/tmb0000085>.
- 35 Erving Goffman, *Encounters: Two Studies in the Sociology of Interaction* (Indianapolis: Bobbs-Merrill, 1961), 18.
- 36 BUIOH, "Oral History at a Distance" Webinar Survey.
- 37 Weller, "Using Internet Video Calls," 617.
- 38 Géraldine Fauville, Mufan Luo, Anna Carolina Muller Queiroz, Jeremy N. Bailenson, and Jeffrey T. Hancock, "Zoom Exhaustion and Fatigue Scale," *Computers in Human Behavior Reports* 4 (August–December 2021): 3, <https://doi.org/10.1016/j.chbr.2021.100119>.
- 39 Charlie Morgan, "National Life Stories," case study, London, United Kingdom. (Located in Section II.)
- 40 "OHA Principles and Best Practices," adopted October 2018, Oral History Association, <https://oralhistory.org/principles-and-best-practices-revised-2018/>.
- 41 What is meant by "recording landscape" can include a variety of factors, from narrators' familiarity and comfort with technology to potential distractions in their recording environment that could be addressed. Issues that emerge in the pre-interview meeting could also encourage a pivot to telephone recording or a shift to a face-to-face interview.

- 42 Face-to-face oral history interviews are quite distinctive as an interaction. In this, it would be difficult to mistake it for a more casual, informal conversation. General online meetups can vary from a business conference to relaxed hangout.
- 43 Hannah Deakin and Kelly Wakefield, "Skype Interviewing: Reflections of Two PhD Researchers," *Qualitative Research* 14, no. 5 (October 2014): 610.
- 44 Julie Todaro has had a long-term commitment to the Girl Scouts organization in many ways, including producing the opera *Daisy*, the story of the founding of Girl Scouts. Julie Todaro, interview by Amy Achenbach, April 7, 2021, transcript, Baylor University Institute for Oral History, Waco, TX.
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- 46 Anna F. Kaplan, "Cultivating Supports while Venturing into Interviewing during COVID-19," *The Oral History Review* 47, no. 2 (September 2020), 220, <https://doi.org/10.1080/00940798.2020.1791724>.
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- 55 Baylor University's Institute for Oral History began collecting oral history interviews in 1971. This average is drawn from 9,285 hours of recording across 6,888 interviews.
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- 57 Anna Sheftel and Stacey Zembrzycki, "Slowing Down to Listen in the Digital Age: How New Technology is Changing Oral History Practice," *Oral History Review* 44, no. 1 (Winter/Spring 2017): 111, muse.jhu.edu/article/660131.
- 58 The documented fatigue and impaired well-being reported from excessive usage of videoconferencing. See Nerys Williams, "Working through COVID-19: 'Zoom' Gloom and 'Zoom' Fatigue," *Occupational Medicine* 71, no. 3 (April 2021): 164, <https://doi.org/10.1093/occmed/kqab041>.
- 59 Benjamin L. Read, "Serial Interviews: When and Why to Talk to Someone More Than Once," *International Journal of Qualitative Methods* 17, no. 1 (January–December 2018): 8, <https://doi.org/10.1177/1609406918783452>.
- 60 BUIOH, "Oral History at a Distance" Webinar Survey.

- 61 Even in conducting audio-only interviews face-to-face, I have often worked with the narrator to describe a visual element that may enter the interview with an eye toward a more descriptive text for the transcript, such as working with a narrator to describe a schoolhouse bell picked up and rung or a favorite species of bird that passed by outside the window during the oral history.
- 62 Crager, "Interviewing Remotely," case study.
- 63 Amanda Holt, "Using the Telephone for Narrative Interviewing: A Research Note," *Qualitative Research* 10, no. 1 (February 2010): 116.
- 64 Holt, 115.
- 65 The lack of the ability to read the narrator also means that they need to be encouraged to verbalize their real-time interview experience, things the interviewer may normally intuit in face-to-face settings. This can include their discomfort with a question asked, their need for a break, or their desire to bring the interview to a close.
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- 67 Katherine Waugh, "Failing to Connect? Methodological Reflections on Video-Call Interviewing during the Pandemic," *The Oral History Review* 50, no. 1 (2023): 76, <https://doi.org/10.1080/00940798.2023.2178316>.
- 68 The level of technical or connection problems, such as low sound and bad picture quality, can lead to a higher level of exhaustion for both participants in the interview.

6

REMOTE RECORDING TECHNOLOGY

Steven Sielaff

Lorynn Divita was not averse to the idea of spanning distance to capture oral histories for her research. A professor of human sciences and design at Baylor University, her willingness to crisscross the central and eastern regions of Texas and interview leading bootmakers had led to her acceptance as a Baylor University Institute for Oral History (BUIOH) Faculty Fellow for 2020–21. Trained in oral history methodology by the BUIOH staff and loaned professional audio recording equipment, the project seemed well in hand until the COVID-19 pandemic swept over the United States in the spring of 2020. With the summer fast approaching, Lorynn suddenly shifted into a world of videoconferencing software and emails containing scheduled hyperlinks, as well as the new dynamic of connecting with narrators who sat hundreds of miles away from her while both stared and spoke into tiny electronic devices. Thankfully that same summer, BUIOH built its on-site recording studio, complete with computer and telephone stations for distance interviews. In a promotional video shot for the Baylor Library Board of Advisors, Lorynn shared,

Because of [the BUIOH recording studio], we've spoken with bootmakers in [El Paso,] Amarillo, Houston, and Austin, which we never would have been able to do before Zoom. We're very excited, and the bootmakers are excited to share their stories with us.

For those who do not consider themselves proficient with technology, managing recording equipment and keeping track of digital files during a project can often be some of the more harrowing aspects of the oral history

process. Imagine, if you can, the flurry of activity of a typical prerecording environment (connecting cords, checking batteries, testing levels, etc.), but now remove the narrator from the room, give them their own equipment to set up, and ask both parties to somehow communicate with each other. This is the situation many oral history practitioners find themselves in when first contemplating how to translate the in-person experience to a distanced interview. While some of the equipment-based elements to distanced recording may seem familiar, they are almost always impacted by new and/or random circumstances surrounding the particular environment the interview takes place in.

An essential element in the overall development of the oral history field is the way in which technology enables humanity to capture stories through the human voice. First came the invention of recording processes, equipment, and media to preserve the voice, followed by the mass production and dissemination of recording equipment that made it possible for a growing number of professional and amateur historians to literally record history. With the advent of the digital age, the technology became a part of everyday life for us all, and now, the twenty-first century offers seemingly limitless ways to record audio and video. Now, the introduction of remote recording only adds to this complexity.

This chapter discusses the impact that distanced interviewing has on the digital recording technology required to best capture the interview. I begin by describing the various established procedures and technologies utilized in a standard in-person interview process, then pivot to the unique ways in which a remote interview requires different and/or additional considerations, both in terms of technology and best professional practice. One major note before we proceed: this chapter will not endorse any particular product or service but may provide examples of current choices available or cite online resources that do so as well. Since technology shifts almost as quickly as history itself, this section will rely heavily on *Oral History at a Distance's* web-based companion to stay current with trends and markets post-publication.

Traditional Recording Environments

Early in the project design phase, oral historians must choose whether to record their interviews in audio and/or video. There are huge differences when it comes to the outcomes or consequences of each method, including but not limited to equipment choices, expertise needed, effect on the narrator, effect on the user/listener/viewer, and impact on archiving protocols. This section will discuss the basics of both audio and video recording environments and will set the stage for the more complex scenarios found in remote recording projects.

In-Person (Audio)

Since the inception of oral history as a professional avocation in the 1940s, interviews have been conducted in a room containing an interviewer, a narrator, and a recording device placed between the two.¹ While decades of technological progress in audio engineering have produced equipment of varying sizes and capabilities, the overall environment remains the same. In the twenty-first century, in-person audio interviews are typically captured by a professional-grade digital audio recorder utilizing either onboard directional/omnidirectional microphones or dedicated external microphones. Audio-recording environments, therefore, can span the gamut of a room in either a home or office space where the interviewer brings the equipment on the day of the visit to professional sound studios with built-in recording hardware and professional microphones stationed around a central table.

In-Person (Video)

Professional oral history interviews captured on video are typically centered around the type of shot the oral historian wants to capture. Though a vast variety of shots are represented on both analog and digital media from the past several decades, in our current digital age of oral history, most video interviews are centered around a static close-up shot of the narrator.² Creating the proper environment for a quality video interview is much more complicated than that of an audio-only interview. Not only is the videographer introduced as a third person in the room but the amount of additional equipment needed (including, but not limited to, the video camera, a lighting kit, reflectors, external microphones, tripods/stands, and lighting/picture-quality verification aids) and expertise in its setup and use can give both interviewers and narrators pause when considering its value to the project. Features of the room itself, such as natural lighting sources and decorative backdrops, also affect the filming. Though the equipment list is extensive, most video interviews are still conducted in homes or indoor public spaces. Finally, many narrators will be concerned regarding their appearance on camera, which can even impact their acquiescence to the interview in the first place.

Traditional Recording Equipment

Professional Audio Recorders

In the first several decades of professional oral history, recordings were achieved with machines that captured sound on analog media, beginning with the larger open-reel tape and then shrinking in size to the audio cassette tape or microcassette tape. The recording machines themselves shrunk as well so that you no longer needed a product the size of a suitcase but could

hold the entire recorder in your hand. As analog transitioned to digital in the late 1990s to early 2000s, a great number of products and media came and went until the professional recorder industry settled on two main options for solid-state digital recording media: CompactFlash (CF) and Secure Digital (SD), with the latter eventually winning out and becoming the standard onboard media used across the industry. In addition to this media, recorders in the twenty-first century feature screens that display decibel levels, track file lengths, and provide menu options for how the sound is captured, specifically what file format to use (currently the professional recommendation is for an oral history interview to be recorded in WAV format for preservation).³

Modern audio recorders are around the size of your hand and provide multiple options for how to capture the sound: onboard directional or omnidirectional microphones, three-pronged XLR connector inputs for external professional microphones (so named for the original Cannon X connector [X] that later added a latch [L] for a satisfying click and rubber [R] for resistance/fit),⁴ or any number of other inputs to connect additional microphones or devices through which sound data is transferred. While onboard omnidirectional microphones can help blend speakers across two channels, they are also more susceptible to room noise. Directional microphones, with the ability to focus on a tighter field of reception and independent level settings, are the professional standard for quality, though remember that, in an oral history interview, the vast majority of speaking is done by the narrator, and therefore for those listening with headphones, a certain amount of audio mixing would help to normalize the left/right balance. The price range of recorders typically is based on the number of inputs or audio channels it can process; the quality of microphones supplied; as well as certain internal components such as preamplifiers (or preamps), which convert weaker sounds to a proper level without requiring the recorder to capture a louder, often noisier initial signal. These recorders also employ direct current (DC) power cords, battery power, or a combination. They can be connected to a computer via a USB cord to transfer files, though files are also easily transported by removing the SD card and reading it directly on another device.

Professional Video Recorders

BUIOH recorded its first video oral history interview in 1979 using a homebrewed setup, featuring a bulky analog video camera connected to a small tube television, for visual assessment, that recorded to an analog Betamax tape. Though other video oral histories existed before this time, this general analog concept prevailed until the evolution towards digital videorecording mimicked the audio world, resulting in smaller cameras with onboard screens and smaller forms of recording media, with tape-based cassettes eventually giving way to SD cards. Today, video recorders can range from simple camcorders



FIGURE 6.1 Dr. Thomas L. Charlton, founding director of BUIOH, poses next to the office's initial video-recording kit, circa 1979, which recorded to Betamax tape and utilized a CRT (cathode-ray tube) television for quality control. (Photograph property of Baylor University Institute for Oral History)

to digital single-lens reflex (or DSLR) cameras with onboard video capabilities, to professional machines that require specialized lenses and feature an entire host of calibration options. Perhaps the most distinguishing modern feature is the ability to record in high-definition (HD) formats, which are typically represented as options starting at 720p and concluding with the highest resolution available to the unit. In almost all situations, the audio for the interview will continue to be recorded by a separate, external microphone connected to the video recorder, or sometimes connected to a different professional audio recorder with the intent of splicing the video and audio files together in postproduction. Recordings are stored on solid-state media in the form of SD cards, though many cameras require special versions that both hold more data and provide faster transmission speeds than SD cards used for audio devices only. Currently there is no agreed-upon format for video preservation like there is for audio,⁵ though many cameras provide file-type options such as AVI or MP4 that are widely accepted by archiving institutions. Video cameras almost exclusively need plug-in power to operate for the long periods of time required to capture an oral history, though onboard batteries can serve as backup. SD cards transfer recorded data the same as

with audio recordings, though more complex cameras allow for data to be captured in real time to an external solid-state hard drive.

Microphones

In the professional audio world, microphones are fairly straightforward in that you decide what sort of polar pattern (the physical space the microphone best captures sound from) you wish to capture and then purchase the industry leaders in each category. With the advent of mass remote communication through personal computers and smart devices, however, there are now more choices and more decisions to make in this area. In this section, I will discuss the major polar patterns and their use in physical space, differences in professional equipment setups, and finally, the options for purchasing new or adapting old equipment for remote environments.

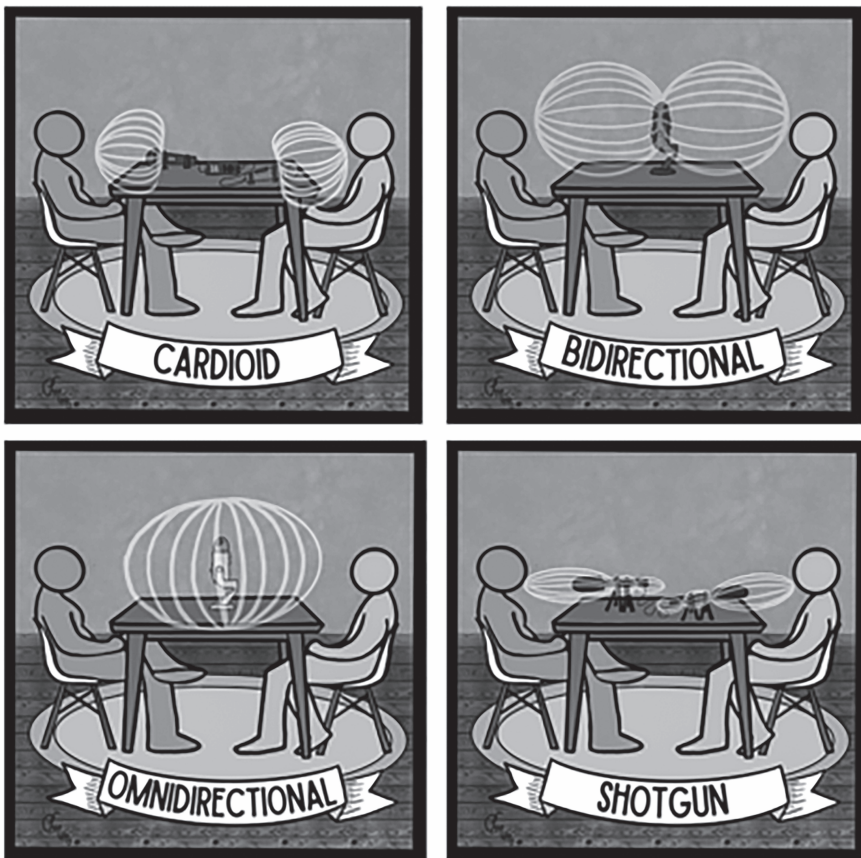


FIGURE 6.2 Microphone Polar Patterns

Common Polar Patterns

Four main types of polar patterns are deployed in oral history recordings. The first is cardioid (sometimes referred to as unidirectional), and it is the most common as its pattern focuses primarily on the 180-degree range in front. Most microphones you see sitting on top of or attached to tables that are placed in front of your favorite talk show or podcast host are cardioid. In oral history circles, these microphones are set up in pairs so that each speaker has a separate channel of recorded audio dedicated to them. The second pattern is bidirectional, or figure eight. This type of microphone assumes there will be sound to record in both the front and back of the placement. This can be helpful in oral history if you are looking to use only one microphone in a setting where the participants can sit close to each other. In addition, bidirectional-style microphones can be deployed in pairs and kept in the same line with the participants so that the resulting channel recordings are not as one-sided as cardioid. The third type of microphone is omnidirectional. These microphones record sound from all directions within the microphone's range. This creates the ultimate even distribution of sound, especially in a headphone-playback environment, but could also introduce unwanted noise aspects from around the space. Finally, we have the shotgun, or lobar, pattern, the term *shotgun* taken from the long cylindrical shape of the microphone itself. This pattern is thin, long, and utilized primarily to focus on sound emanating from a specific point from across the room. Shotgun microphones are often deployed in video oral history interviews and are sometimes suspended from the ceiling. Knowing the strengths and weaknesses of these four patterns will aid an interviewer in determining the best microphone to use in a particular space.

Differences in Microphone Types

In professional circles, almost all microphones use an XLR or 3.5 mm connection—or require an adapter to switch between the two. Some microphones also require onboard power (usually AA or AAA batteries) or draw their energy from a feature known as phantom power, which means the power to run the microphone is drawn from the equipment to which it is connected. Power needs for microphones are important to pay attention to as they can dictate equipment decisions beyond the microphone itself. Power also plays a role depending on the internal workings of the microphone, which is usually represented when describing the microphone as either “dynamic” or “condenser.” I will not go into the physics behind the differences in the two but will merely say that condenser microphones require phantom power to operate properly, whereas dynamic microphones create more of their own energy but often require something known as a preamplifier, or preamp, to boost the signal to an acceptable decibel range. Preamps can be purchased

separately or can be features found on certain recording devices. Make sure you research any power needs for your microphones, and remember that it will probably take extra time to thoroughly test and possibly augment your equipment choices to get the best sound quality and levels out of your setup.

Remote Recording Environments

Telephone (Landline/Cellular/Hybrid)

The original technology for conducting remote oral histories, landline telephones, at their core, can provide the simplest of connections and sound sources so that an interviewer can use the recording equipment of their choice to capture the conversation. Besides the obvious fact that telephone connections mean separate recording environments, an important distinction for landlines is that they are physically tethered so that location choices for both participants are limited to the location of the phone line, a fact that could be overlooked when you consider that, in a country like the United States, a vast majority of the population has gone wireless.⁶ Capturing the audio from a telephone conversation usually is accomplished one of two ways: either the speaker is placed near a separate microphone/recording device, or an adapter is used to transmit the sound signals to a recording device directly. For those who wish to further invest in a telephone recording setup, mixers can be employed between the lines and the recorder to help balance levels and improve sound quality.

Cellular phones allow flexibility for the participants' locations and some choices for the interviewers in recording the conversations. With this freedom comes considerations regarding cellular signal strength. In addition, cellular phones introduce a heavy reliance on battery life unless one uses a cord to voluntarily tether themselves to a power outlet or uses an auxiliary portable power bank. Concerning the recordings, smartphones have access to any number of applications that allow both local and cloud-based storage of conversations. As we will discuss later, the quality and security of these recording options will play a major role in which application is chosen for the job.

Both landline and cellular phones can be used interchangeably for any telephone-based distance interview setup. In addition, conference call and videoconference platforms allow multiple users to utilize telephones to call in and participate alongside others, opening the door for both group interviews and additional recording options through these platforms. The decision for the interviewer on which platform to choose typically is driven by the recording method that works best, though for both sides of the conversation the ultimate factor may be a combination of cellular signal strength and reliability. Proper testing and dedication to a single location for cellular users are key factors in creating a steady environment. Regardless, one of my maxims

when it comes to this type of recording is, “It’s hard for a telephone interview not to sound like a telephone interview.”

Online (Audio)

The popularity of the podcast medium is mainly responsible for the sector of online platforms available for capturing quality audio when the interview participants are in different physical locations. The majority of these platforms employ “double-ender” recording systems, which means each participant’s audio is recorded locally and then uploaded to the platform’s server where they are merged into a single high-quality product. This means that each interview participant has the ability to invest in additional equipment and produce a sound file that can approximate the in-person experience. Of course, this setup comes with several environmental considerations: room ambience, equipment access/familiarity, and online bandwidth, to name just a few. Many platforms now feature video elements that are not recorded, allowing the participants to connect visually during the interview. Most platforms favor a web browser-based approach so that participants merely need to enter a website and interact with the options presented on the page, rather than installing and running a separate piece of software. About a year after the outbreak of the COVID-19 pandemic and a considerable amount of research, the British Library’s National Life Stories oral history program decided to employ the double-ender platform Zencast for their remote recordings. The ability to locally record uncompressed WAV files while utilizing but not recording (and subsequently having to store) video appealed to this audio-only shop, which resulted in 635 hours of quality remote audio recordings in a little over a year.⁷

Online (Video)

Videoconferencing platforms have been available to the public since the 1990s, but the COVID-19 pandemic ushered in their current golden age.⁸ While the primary purpose of most modern platforms may have been built around connecting with family and friends, more and more systems now cater to the business world and, accordingly, offer greater accessibility and functionality than ever before. Additionally, after the rise of smartphone and tablet usage, videoconferences are no longer tied to the table. While these devices certainly can be employed situationally, for the sake of oral history, online video interviews should center the participants in a quiet space with consideration given to the background captured by each participant’s webcam. These platforms can either feature stand-alone software or web browser integrations and provide a variety of options when it comes to how participants are represented on the screen and what file formats are used for the recording.

Additionally, the opportunity to store data on *the cloud*, a term used to represent an external data server you can connect to via the internet but do not fully control access to, has raised the specter of privacy and security concerns, particularly for sensitive projects. Fundamentally, though, the remote video process still boils down to attempting to capture a preservation-quality media file in a controlled environment with the best equipment available to the participants at that time.⁹

Narrator Environment versus Interviewer Environment

Before buying new equipment or subscribing to platforms for your remote interviews, be sure to consider *all* the environments your interviews could take place in. This new dynamic of your environment versus their environment greatly impacts the technology choices and quality expectations for an oral history project. In the past, the interviewer could feel at ease knowing they were fully trained in their equipment and could deploy it expertly in most situations. Now the narrator's environment can wreak havoc on the interviewer's best-laid plans, and no matter how much preparation is used to make the interviewer look and sound awesome, these efforts have no effect on the 90 percent or more of speaking/screen time that features the narrator. Because of this dynamic, project directors might devote extra time and resources to aiding narrators in not just learning how to use new technology but perhaps to actively loan equipment to narrators to use for the interviews. This obviously increases the time needed for scheduled meetings, either at the pre-interview stage or on the date of the interview, in order to help the narrators set up and test their equipment, but this could be a great middle-ground approach for quality outcomes.

For example, in 2021 the Smithsonian Archives of American Art Oral History Program built remote kits to mail their interview participants (see Figure 6.3)—full setups based around a tablet for the narrators and various degrees of accessories (webcams, microphones, etc.) for their contracted interviewers. These kits included full manuals detailing both the contents of the kit and how they function in the process of a remote interview, in this case, conducted on the Zoom web-conferencing platform. In our conversations about this initiative, Archives of American Art oral history archivist Jennifer Snyder emphasized the importance of the availability of project staff to supplement these guides:

The same interviewer might be interviewing multiple narrators who are all getting different kits. [I] have noticed we are on call a lot more than we were with in-person interviews. With this [remote] setup . . . [interviewers] call you on the weekends, they call you at night, they call you when you are home. One thing that has been helpful: if we can video call or if they can text and send a screenshot of what they are seeing, then that helps me [learn] what's going on.¹⁰

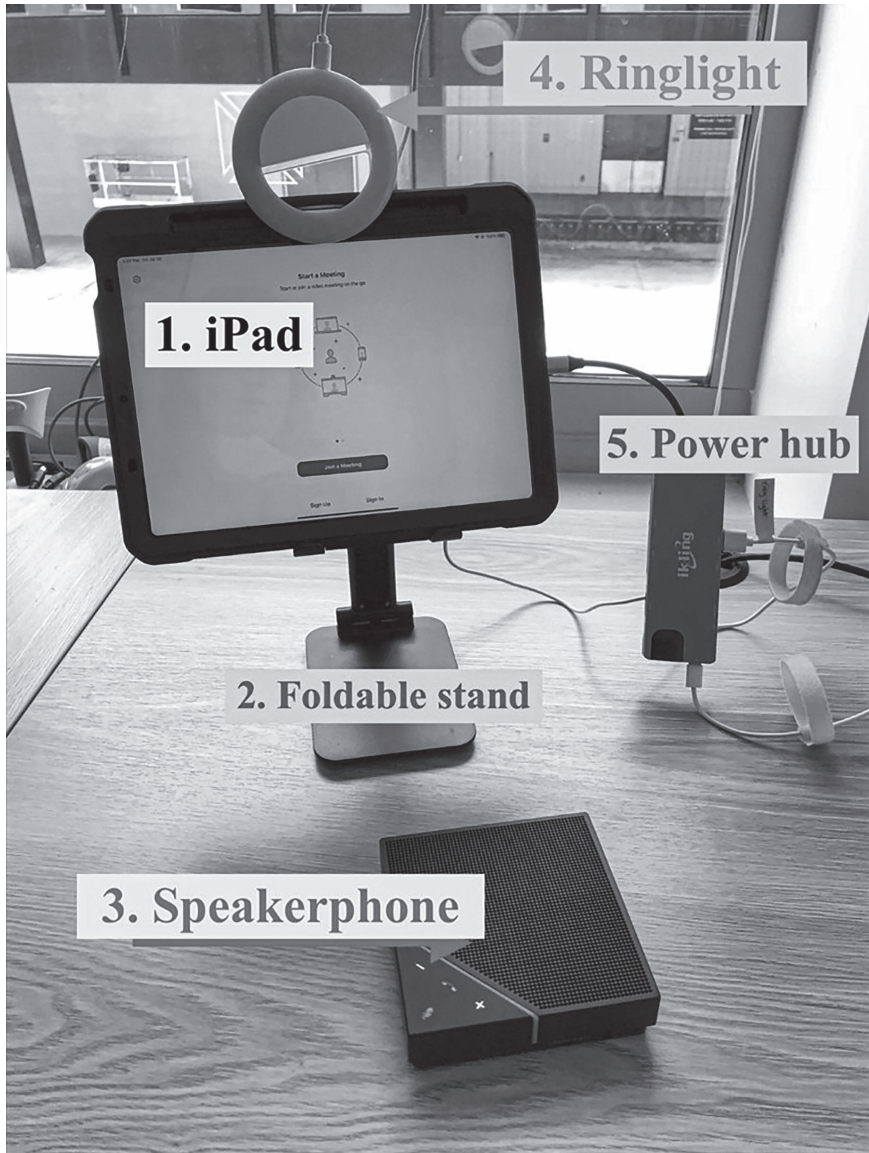


FIGURE 6.3 A remote interviewing kit created by the Archives of American Art, Smithsonian Institution. (Photo courtesy of Jennifer Snyder, oral history archivist, Archives of American Art, Smithsonian Institution)

Levels of Technological Comfort

Perhaps the greatest impact of the COVID-19 pandemic on the oral history profession has been to sharpen the focus on the importance of the pre-interview. For remote interviews, this step now serves as a vital test run for the equipment and connections on both ends of the interview. The pre-interview will likely be the first opportunity to assess which remote platform works best for the situation, based on the interviewer's observed behaviors of the narrator, or from past experience, pro or con, with the technology or the stability of the connection. Hashing out these issues well before the day of the interview will greatly impact the success of the final recording. The more thought you put into the technology setup and the narrator's comfort level up front, the better the chances of success are during the recorded interview. Regardless, when considering your options in this test environment, it is advised to always default to the setting or technology that the narrator is most comfortable with.

Video's Extra Impact

Video recording is one major element that many remote platforms introduce that those with in-person interviewing expertise might be unfamiliar with. Much is often said about the weight video adds to a project design, both from a macro investment level down to the itemized micro level, such as the nerves of a particular narrator when it comes to being placed in front of a camera.¹¹ Narrators who are interviewed in projects that are forced to make a change during production and incorporate remote interviews may suddenly find themselves in a visual environment when only audio was originally pitched to them. While video services can greatly aid in connecting with narrators across distance, they can also be distracting, especially when participants see themselves on-screen, a behavior that for most is typically limited to brief glances in the mirror. How narrators react to being filmed is only one element of this dynamic. Project managers must also decide how the inclusion of video impacts the final product and if any special consideration should be made (both legally and ethically) for including a new video element to an original project design. In the past, BUIOH used a supplemental form that dictated what, if anything, should be done with the separate video files captured during a remote interview, but we updated our policy and dispensed with this form after deciding that our standard deed of gift was broad enough to cover these video files. Currently, if a narrator expresses they do not want their video made available online or saved in our collection at all, we have them sign a restricted deed of gift that outlines their wishes. Also, even though one can save video files after an interview concludes on many videoconferencing platforms, simply utilizing the video during the interview

as an aid for connectivity and then saving only the audio and deleting the video after the interview is over can allow a project to sidestep certain legal or preservation issues that arise with the inclusion of archival video products. Ideally, the final decision of whether or not to record and save video content will likely be made by the narrator, and oral historians should endeavor to honor their wishes whenever possible.

Remote Recording Equipment

Professional Audio Recorders

As mentioned previously, even though a particular interview features a remote connection, that does not mean that traditional recording equipment is entirely useless. A standard entry-level audio recorder features a mix of professional-grade onboard microphones and/or microphone inputs, and it allows you to capture files locally on an SD card in preservation-worthy formats. During a remote interview, these recorders can still be used to capture sound locally, which often means the interviewer's voice in the room, as usual, plus the sound from the narrator's connection point. The narrator's audio is transmitted either via a speaker attached to the device running the remote connection platform, or, in some cases, a direct line from the device that can be adapted to connect to a microphone port on your recorder. For direct feeds, the recorder itself often features a variety of connectivity options to adapt to various environments, ranging from the standard XLR microphone inputs to the 3.5 mm or USB ports. Ideally, an interviewer will have an opportunity to determine the overall remote setup before purchasing the recorder to assure that the chosen model can accommodate their plans. In general, know that a direct connection will always result in a higher-quality product when compared to placing a microphone in front of a speaker replicating your narrator's input.

Telephone Adapters/Mixers

In addition, when conducting telephone interviews, you may need to purchase an adapter or mixer to perform certain functions and act as a conduit between your phone/landline and your recording equipment. These devices range from simple hardware that combine lines of audio into one that is then fed into your recorder, to an entire mixing deck that allows you to mix levels on each line and output them accordingly. Some of these tools have transcended landlines and now work with either a Bluetooth or corded cellular connection to allow a cellular phone or smartphone to utilize the same system of audio capture.¹² One additional feature to consider is the nature of the technology your telephone line employs to transmit the signal. Most

people consider a traditional phone line to be a landline, and this is indeed the standard analog option. However, there is another system called Voice over Internet Protocol (VoIP), which needs an active internet connection to place the call. Many adapters and mixers only work with one of these two options, so research the telephone infrastructure you plan to use before purchasing these materials.

Microphones

As with the audio recorder, microphones purchased for in-person interviewing can possibly serve a role in remote interviewing. Your typical microphone setup can still be used as long as they are placed in front of the speakers, either human or mechanical. Also, a number of adapters allow you to connect professional microphones to a computer. However, the vast majority of microphones used with computers are specifically sold as such and use a USB connection to communicate with and power the device. Some of these products are found as part of a headset or partnered with webcams (which will be covered in the next section), but many of them are dedicated, stand-alone, plug-and-play microphones that look and behave much like their professional brethren. A number of high-quality USB microphones are on the market and will produce professional-grade results. Additionally, microphones designed for use with smartphones also exist and would be a smart investment for anyone planning to utilize a smartphone-as-recorder strategy for a medium- or large-sized project.

Finding and testing one of these options for a relatively small investment is a reasonable ask, though for remote interviewing a prevailing issue will always be “their environment.” Most smartphones and laptops come supplied with basic microphones, and many remote conversations employ these tools. To enhance this side of the equation, however, would require narrator investment or the interviewer to send the narrator the equipment to use during the interview. Depending on the total investment needed and the potential improvement in sound quality, project managers may want to consider a large-scale loan or outright purchase program for improved microphone usage.

Webcams

A webcam is defined as a specialized video camera that is built within or connects to another electronic device. Entry into the world of webcams typically comes with laptop, smartphone, or tablet use. Onboard/front-facing cameras are ubiquitous in these devices, and for the handhelds the quality continues to improve, though, as any dedicated selfie enthusiast will tell you, they cannot compete with the larger (and sometimes multiple) cameras located on

the backs of these devices. Indeed, many laptop cameras are so small they can easily be overlooked until the need to use them arises, and some models have begun to exclude the camera altogether. Enter the dedicated webcam: a device that uses a USB connection to offer higher-quality video (and in some cases audio) than built-in options. Webcams can vary in cost and offer a variety of extras such as the aforementioned audio functionality, degrees of high-definition capture, and/or automatic focus correction. There are even models now that pair with a ring light that attempt to solve all your remote recording needs. When choosing a webcam, it may be best to go with a Goldilocks approach: that is, choosing a camera that provides a certain level of quality, but not one that trends more expensive due to additional features. A dedicated microphone will capture better audio, and a dedicated ring light will offer more flexibility for your profile. In general, in my position at BUIOH, I use all the elements of an all-in-one webcam for day-to-day use, but when it comes time to record an interview or present for a conference, I always make sure to utilize the higher-grade dedicated equipment for sound and lighting.

Lighting

As mentioned earlier, ring lights, which are circular in structure with a void in the middle (like a big doughnut), are popular options currently for remote recording. The light is typically attached to a monitor or sits directly behind the monitor on a stand, and many feature not only brightness settings but temperature settings as well, which change the tint of the light from orange (low) to blue (high). The higher quality the ring light, the more options you have in these spectra. These can both be vital to a proper light profile depending on the latent brightness of your room and/or the skin tone of the individual. An additional factor here is the brightness/color exuded by your device's screen. Keep this in mind when testing your profile, as even simple things, such as the design of the connectivity software, can play a big role in the mix of brightness and shades, especially if you use a platform option that shifts its visual representation depending on who is speaking. For this reason, make sure to adjust your settings accordingly to attempt to maintain the most static screen possible, and use this environment to conduct your profile tests.

Professional in-person video setups often employ a series of key lights (direct lighting sources, mainly LED panels these days) and indirect reflectors (positioned opposite key lights to reflect back a portion of the light) to surround a centrally positioned narrator. Sometimes also used is a backlight, a smaller light usually attached to the back of the narrator or their chair. Any of these options could still be utilized in a remote environment, but their general availability, the space required for such a setup, and the expertise needed to apply them properly cannot be counted on at the narrator's site. In general, the

ambient light sources in the narrator's room will be all that you have to work with, so the tried-and-true rule sets for in-person environments remain:

- Stay away from windows or use heavy shades.
- Attempt to aim the heaviest light sources at the narrator from behind the recording device (to avoid extreme backlighting).
- Do not sit directly under ceiling lights.

Finally, even if the narrator is the most ardent of nature lovers, stay firm about the necessity of recording indoors. No matter how great they look in natural light, the light variances over the course of an hour-plus interview, not to mention the assured cacophony of ambient noises, make outdoor recording a nightmare.

Remote Recording Platforms

Smartphone Applications and Hardware

As mentioned previously in this chapter, for those using a smartphone to not only place a call but record the conversations as well, the quality and feature set of the smartphone application (commonly referred to as an app) used is a key factor in your decision-making process. Between the Apple App Store (iOS) or Google Play Store (Android), there are over a hundred options in this sector, with even legacy applications receiving new updates or tiers of service over time. Choosing the best voice-recording app for your phone can be difficult, but keep in mind these three major requirements:

- Does the app record in WAV format?
- Where does the app store the resulting file, and how easy is it to transfer?
- How stable is it? (Can it operate for an hour or longer without crashing?)

Most apps in these stores currently only record in MP3, so this specification alone can help you narrow down candidates. How the files are stored, and if they are stored in a cloud-based server versus locally, can also eliminate choices for those who care about file safety and overall quality (a file preserved on an outside server is almost always compressed in some manner, even if it is saved in a WAV format). Once you narrow down your choices, it may simply be best to test the contenders against each other, mainly in the realm of app stability. Remember, you will need this application to remain active for a long period of time, so any entrant that seems to have random crash errors will not be well suited for a long-form oral history interview.

Once you decide, you will need to prepare both the physical space on the phone and the power needed to ensure your device can run for the length of the interview. This can be an important part of the testing process as well, if for no other reason than to determine exactly how much digital space per hour the application requires. I strongly suggest plugging the device into a power source while recording as well to avoid abrupt conclusions or the distractions of power warnings. Speaking of distractions, while you cannot employ airplane mode during a cellular call, you may want to research other do-not-disturb-style settings to limit the number of sounds or notifications coming from the device during the interview.

Additionally, consider the alternative connectivity of your smartphone via the Bluetooth short-range wireless system to connect your phone to a separate device that will do the recording for you. This either requires the recorder itself to have Bluetooth capabilities built in, or the purchase of a dedicated adapter or an add-on adapter specially made for the external recorder. This transfers the burden of the recording off the software and back to your trusty hardware, but it, of course, means a greater financial investment in equipment up front.

Videoconferencing Software

During the COVID-19 pandemic, a vast new sector of the population joined new software platforms en masse in order to communicate with others on videoconferencing applications.¹³ While the Zoom platform became an eponymous synonym for this sort of service, the fact remains that other services existed before the pandemic and were either invented or improved upon to fill the global need for remote communication.¹⁴ Videoconferencing software that oral historians can utilize for remote recording share three main attributes:

- They require an internet connection.
- They allow both audio and video transmission between users via built-in or connected capture devices.
- They provide for local or cloud-based recording of sessions.

Consider also that, as with smartphone applications, the quality and file types that can be saved can make a difference in your choice, and in many cases the file saved may not be in the format that was originally intended for the project or usually required by an archive. This is mainly because most media will be saved as video files, so audio-only projects or archives will need to investigate methodologies for transcoding these files to acceptable formats. Many times preloaded software such as Photos for PC or iMovie for Mac can handle the job for the more familiar formats. Again, perform some initial

investigation to determine how each platform saves data and what procedure you will use afterwards to satisfy your formatting needs.

The main function of videoconferencing software is the ability to see each other during verbal communication, which of course is a boon for an oral historian hoping to establish rapport with the narrator while at the same time noting their body language. Most maximized windows on standard-sized monitors in a one-on-one speaker environment will result in a representation close to a life-sized human face. In addition to these viewing options, investigate the style of recording the software provides. The common framing of a video oral history shot is a pure focus on the narrator. Therefore, whether you want to stay true to this format, or are interested in a recording that features dual screens at once or alternations based on current speaker, you can decide your choice of platform.

The final determining factor here is ease of use for the narrator. Does the selected software require the narrator to own the software and install it on their computer, or do they simply click a link and are taken to a web-based viewer on their end? How familiar is each narrator with the software? What training or specifications must the interviewer provide? Several videoconferencing applications have cross-platform capabilities (such as Zoom's usability on Mac, PC, or mobile devices) that make it easier for narrators who do not have a computer to utilize their smartphones or tablets to connect. All of these factors begin to paint a picture akin to your decisions in buying physical oral history equipment: that is, typically the established brands are often best because of their familiarity, support, and universal functionality.

Double-Ended Recording Solutions

Videoconferencing software options are often limited when it comes to the quality of the recorded media files. While some feature both cloud-based and local recording options, these processes often compress and/or source certain elements of the recorded conversations, leading to poorer-quality recordings that can be heavily influenced by the bandwidth of the participating parties. In extreme examples, dropouts result in complete loss of signal for a period of time. To rectify this situation, certain companies and practitioners have turned to what is called double-ended recording, which simply means that interview content is captured locally at first for each participant and then later combined/synced to create the high-quality master.

The most basic way to accomplish this is analogous to a telephone land-line interview where each participant records their audio on an external device, then transfers the local files later to be mixed. The main issue with this option is that the narrator will need one of these devices, which very often is not the case unless a project is financially built with the sharing and shipping of equipment in mind. Therefore, many in both the oral history and

podcasting world have turned to dedicated double-ended software platforms that accomplish this recording through the computer, then upload the resulting files to a centralized location on the company's server where the master is mixed. Programs such as Riverside.fm¹⁵ that first primarily serviced the burgeoning podcast world found the need to expand to include video connectivity and then later video recording as well to meet the needs of a plethora of professions looking to record professional interviews during the COVID-19 pandemic. Many others, including TheirStory,¹⁶ are now following suit in offering this functionality.

A third option in this category lies in the realm of local-screen-capture software, which allows a computer user to select a space within their monitor, a program window, or an entire screen to record, capturing the visuals that take place in that space as well as audio feeds that the user designates. The most common (as well as freely available) of these are Xbox Game Bar for PC and QuickTime for Mac. These options can create very high-quality recordings resulting in large file sizes, as well as require ample processing power during operation, so keep these considerations in mind when running a computer-based solution that features both a videoconferencing solution and local screen capture.

Practitioners may choose any or all of these platforms when recording at a distance to provide options and/or backups for their media needs. Again, the main factor in the decision will most likely be the narrator's equipment and their familiarity with or eagerness to learn about a personalized setup. If you find yourself struggling with these decisions, my personal advice is to keep the process as simple for your participants as possible, and then choose the platform that offers the best media quality within that particular solution.

Best Practices for Quality Remote Recordings

The Pre-Interview

A staple of best practice within the profession of oral history, the pre-interview takes on an even greater level of importance when planning a remote recording.¹⁷ In addition to the usual goals of establishing rapport and identifying areas of expertise for upcoming sessions, a pre-interview offers the oral historian an opportunity to identify the best location to capture audio and video if the interview is to be conducted on-site. In remote recording, every interview is on-site but also at two locations (at least) at once. While the interviewer will have more time to test their own setting, the limited exposure to a narrator's environment during the pre-interview is often the only chance to identify potential pitfalls in the recording process, let alone test all the equipment on their end. Many of these pitfalls will be enumerated later in this section, but in general it is imperative that narrators are asked to connect and/or sit in the location they plan to use for the interview so that

no matter the medium or platform used, all potential variables can be heard or seen beforehand. Obviously, it is also preferable that the pre-interview be conducted via the same platform as the interview, though in some cases the pre-interview might also include instructions from the interviewer on how to set up the platform/equipment in the first place, then afterwards focus on the platform particulars.

Bandwidth

One additional measurement to be taken during any pre-interview is the internet bandwidth at the participant's location, or the general connectivity stability during the pre-interview session. Even before the COVID-19 pandemic, the digital divide, meaning the availability of affordable digital infrastructure across geographic and class strata, was a point of contention for many social scientists in considering equitable opportunities in an ever-digital world.¹⁸

Bandwidth is a simple term meaning the amount of data transmission over time that is available to a user or location. The more bandwidth you have, the more data can be accessed at a certain point in time, and/or the more users on the same network can access or download/upload at the same time. Many remote connectivity platforms, especially those utilizing video, need a certain level of bandwidth to function properly. For example, many organizers of large videoconferences ask their users not to engage their cameras unless speaking, which is for the direct benefit of not requiring extra bandwidth of all users to receive each camera's data stream. For the sake of remote recording, all parties should assess their bandwidth supply and determine if a particular platform or setup will be stable enough to provide quality connections, and therefore quality recordings, during a lengthy interview. One simple step to remedy bandwidth concerns is to use wired internet via ethernet cord connections whenever possible, as internet speeds via Wi-Fi connections are typically capped at lower bandwidth rates. In addition, Wi-Fi users must concern themselves with the relative strength of the signal in relation to the distance of the modem, which also affects local connectivity rates. Generally, the closer the relative location of the user to the signal source and the fewer physical impediments between you and the Wi-Fi signal, the better. Further, if interview participants have the ability to limit bandwidth use on their respective networks during the time of the recording, such as restricting others from accessing streaming services or engaging in other active internet activities, this too could improve connectivity.

Feedback and Ambient Noise

While setting proper sound levels for professional recordings and analyzing sound samples are skills that most oral historians can learn over time,¹⁹

certain elements of remote recordings will at first seem foreign to even experienced technicians. Beginning in the realm of feedback, sound echo is typically only an issue for in-person recordings in large or spartan rooms, but the introduction of multiple sources of sound beyond the participants themselves can cause severe distractions and distortions in remote recordings. Any setup that features an external speaker carries with it the possibility of feedback at best and extreme echo at worst. The easiest solution to this is to require all participants to wear headsets or earbuds in order to localize their sound. For those who wish to minimize the visual impact, wireless earbuds are your best bet.

In addition, depending on the microphone used or its general location relative to the other equipment, you may encounter a good deal of localized room noise. While most microphones discussed in this chapter will greatly reduce unnecessary noise, the one major difference concerning remote environments is that the microphone may be located close to other equipment, namely computing equipment featuring fans and possible other moving parts, as well as keyboards and mice. While care can be taken to keep participants away from the latter, certain machines are naturally going to make noise over the span of a lengthy interview session. Again, keeping the microphone close to the participant's face as well as using microphones with polar patterns that focus mainly on the narrator's space and not that of other equipment in the general area are the best ways to ward against unwanted ambient noise.

Distractions

When preparing for an in-person interview, one common task is to post a sign outside the door warning everyone that a recording is in session and not to enter. Once the participants' phones are silenced (or, as I prefer, placed in airplane mode), the interview has a good chance of being distraction free. But what if you can't use airplane mode because you are actually using your phone to place a call? Or what if instead of one room, you now have to manage two or more? And what if I told you the majority of disruptors in remote settings are not even human? With every additional remote setting and piece of technology comes the potential for it to distract participants during an interview. Despite our best intentions and pre-interview checks, the possibility still exists that something will happen during the recording that did not show its face during rehearsal. Here are a few categories of distractions to be on the lookout for:

Narrator Surroundings. If we are unable to visit the building or room where the narrator will conduct an interview, then we miss out on those early warning signs of potential interruptions. Therefore, it may be valuable to ask your participants not only to create their own warning sign and close their door(s) but to state if they have any animals (or humans) that are likely to

require their attention during the general time frame of the interview. In addition, be on the lookout for large appliances or clocks that may only create noise at certain times of the day. Believe it or not, you may also need to ask your narrators to mute any televisions or sound systems in the background as well.

Noisy Notifications. Every landline telephone, smartphone, tablet, and computer has the ability to make an unwanted noise during the course of an interview. Therefore, the more technology you bring to bear to make a remote connection, the more likely something is going to beep or ding during the interview. In general, try to close any unneeded programs when recording, and check as many notification settings as possible before you begin. Email/calendar programs are often the worst offenders. Some of these programs can even embed their functionality in your computer's operating systems, or feature settings to notify you of an upcoming event a day or more in advance, so be very diligent in your hunt for these culprits.

Computer Screens. Aural computer notifications are not the only detractor during remote recordings. Visual notifications can also appear frequently and randomly, instantly removing both the narrator's and interviewer's focus from the interview. Notifications can not only break your concentration but also damage the rapport you have struggled to build in an already-challenging environment.²⁰ It is usually a good idea to remove all other visual temptations from your screens, or even turn off additional screens entirely. Some may want to employ a second screen for notetaking during a remote interview, but the sheer amount of noise created from even the quietest of keyboards makes traditional paper and pencil far superior in this situation.

Backgrounds. To a certain extent, the backgrounds in homes or office videoconference settings can be just as challenging to ignore. The more interesting your backdrop, the more likely people will attempt to read every book spine, identify every piece of art, or, in the worst cases, become transfixed by external activity.²¹ When it comes to remote oral history recordings, unless you are specifically looking for purposeful and thematic impacts, keep your backdrops simple, or embrace the void of single-color sheets/curtains. Many videoconferencing platforms also have blur functions to anonymize your backdrop, but be cautious with these as well as sometimes the more animated the narrator, the more likely parts of their visage will be consumed by the blur.

Conclusion

Whether you are new to the world of oral history or a seasoned interviewer, the sheer number of options and considerations when it comes to applying technology to your project can be daunting. The ever-expanding world of remote interviewing has only exacerbated this issue and can leave many

wondering where to even begin. After you have thoroughly digested the content and advice in this chapter, my suggestion would be to utilize another resource I was proud to contribute to: the Oral History Association’s decision tree for remote interviewing.²² This enhanced flowchart provides avenues of inquiry and decision-making that every project should explore and features multiple opportunities to engage with external discussions, case studies, and sample product-comparison charts. Used in conjunction with this chapter, you will hopefully feel prepared to embrace the world of twenty-first-century technology and create the best-looking and -sounding remote recordings possible!



Notes

- 1 “Oral History: Defined,” *Oral History Association*, <https://oralhistory.org/about/do-oral-history/>.
- 2 Brien R. Williams, “Doing Video Oral History,” in *The Oxford Handbook of Oral History*, ed. Donald A. Ritchie (Oxford: Oxford University Press, 2011), 271.
- 3 *Introduction to Oral History: Workshop on the Web* (Waco, TX: Baylor University Institute for Oral History, 2016), 6–7.
- 4 Ray Rayburn, “A Brief History of the XLR Connector,” edited April 7, 2013, www.casa.co.nz/connectors/multipole/cannon/Cannon-XLR-History_4p.pdf.
- 5 For current trends in acceptable video formats, see the Library of Congress’ “Recommended Formats Statement,” at www.loc.gov/preservation/resources/rfs/.
- 6 Stephen J. Blumberg and Julian V. Luke, *Wireless Substitution: Early Release of Estimates from National Health Interview Survey, July–December 2021*, May 2022, 3, www.cdc.gov/nchs/data/nhis/earlyrelease/wireless202205.pdf.
- 7 Charlie Morgan, “National Life Stories,” case study, London, United Kingdom. (Located in Section II.)
- 8 Eighty-one percent of Americans reported using video calling/videoconferencing during the pandemic. Forty-three percent of Americans encountered “at least one form of video calls or videoconferences new to them in the pandemic.” Pew Research Center, “The Internet and the Pandemic,” September 1, 2021, 18, 20, www.pewresearch.org/internet/wp-content/uploads/sites/9/2021/09/PI_2021.09.01_COVID-19-and-Tech_FINAL.pdf.
- 9 During the COVID-19 pandemic, TheirStory’s online video interviewing platform rose to prominence as the software of choice among many in the oral history

- profession. For more background on the impetus behind this sample platform, please see the case study in Section II written by TheirStory CEO Zack Ellis.
- 10 Jennifer Snyder, informal interview with Steven Sielaff, Zoom, December 21, 2022.
 - 11 Sally Seitz, "Pixilated Partnerships, Overcoming Obstacles in Qualitative Interviews via Skype: A Research Note," *Qualitative Research* 16, no. 2 (April 2016): 233, <https://doi.org/10.1177/1468794115577011>.
 - 12 The JK Audio line of adapters is a great example. See www.jkaudio.com/.
 - 13 Zoom was the most downloaded iPhone and iPad app in 2020. Jefferson Graham, "Apple's Most Downloaded App: Zoom Cloud Meeting Ranks No. 1 for iPhone, iPad in 2020," *USA Today*, December 2, 2020, www.usatoday.com/story/tech/2020/12/02/zoom-apple-top-iphone-ipad-app-2020/3785601001.
 - 14 For a sample listing, see the Oral History Association's remote resource chart in their 2020 "Web-Based Recording" document, www.oralhistory.org/wp-content/uploads/2020/10/3c.-Web-Based-Recording-Platform-Document.pdf.
 - 15 Riverside, <https://riverside.fm/>.
 - 16 As of this writing, TheirStory was beta-testing their video version of double-ended recording.
 - 17 For more on the importance of the pre-interview in the oral history process, see Chapter 5, "Interviewing at a Distance."
 - 18 Mei Lan Fang, Sarah L. Canham, Lupin Battersby, Judith Sixsmith, Mineko Wada, and Andrew Sixsmith, "Exploring Privilege in the Digital Divide: Implications for Theory, Policy, and Practice," *The Gerontologist* 59, no. 1 (February 2019): 1–15, <https://doi.org/10.1093/geront/gny037>.
 - 19 For an introduction to sound engineering in oral history, see Douglas A. Boyd, "Achieving Good Audio Recording Levels," *Oral History in the Digital Age*, 2012, <https://ohda.matrix.msu.edu/2012/06/achieving-good-audio/>.
 - 20 Cary Stothart, Ainsley Mitchum, and Courtney Yehmert, "The Attentional Cost of Receiving a Cell Phone Notification," *Journal of Experimental Psychology: Human Perception and Performance* 41, no. 4 (August 2015): 893–97, <https://doi.org/10.1037/xhp0000100>.
 - 21 For more on the impact a narrator's backdrop can have on a remote interview, see Chapter 3, "Ethical Considerations for Remote Projects."
 - 22 "Considerations for Remote Oral History Interviewing," *Oral History Association*, 2020, www.oralhistory.org/wp-content/uploads/2020/10/Remote-interviewing-guidelines-10.8.2020.pdf.

7

PRESERVING REMOTE RECORDINGS

Steven Sielaff

Since the early days of the oral history profession when interviews were recorded on open-reel tape, through the various other analog audiovisual formats of the 1980s and 1990s and up to the CompactFlash or Secure Digital cards of our current digital age, one fact was constant: after the interview, we knew exactly where the recording lived. Now, in the era of cloud computing and online connectivity software, we no longer have this luxury. *Distance* not only refers to the location of the participants of an interview but can apply to our relationship to our precious raw media files as well. This fact alone should be enough to warn all twenty-first-century practitioners that proper preservation protocols have changed, and that all remote projects moving forward need to consider the impact of distance on proper planning and investment for preservation. Further, if one looks at what I like to call the core materials of oral history accessioning (interview data form, signed contract, and original recording files), it is easy to imagine multiple scenarios where the initial storage locations of each item differ wildly after a distance interview has concluded. While multiple choices and options for file management can certainly provide flexibility for a project, it also means much more time will be dedicated to understanding these possibilities and adapting workflows as needed. In this chapter I will provide a thorough overview of the systems now in place to aid you in the capture and organization of digital media and paperwork files, and explain the various new security and organizational challenges remote interview projects will introduce.

Digital Preservation Workflows

As Nancy MacKay states in her seminal volume *Curating Oral Histories*, the transfer of oral histories from the creators to the curators “is a vulnerable time for oral histories, as opportunities abound for miscommunication, loss of

important metadata when interviews move from one stage to another, or fading enthusiasm after the excitement of the interviews.”¹ Any major oral history effort must include proper archival planning: guidelines for how materials will first be procured and then transferred to a stable archival platform. Early in the planning stages of any project, the leadership needs to determine what will ultimately happen to the products, consisting of media files, still photography, paper or digital documents, and ephemera. Usually, this means conversations with prospective archives or other collecting institutions to determine a future archival home, which will often include agreements concerning file formats, total digital preservation footprint, and overall time frames. Because each archive is different, I will not go into much detail here regarding formats but will point out that audio preservation formats are settled across the industry (WAV files at 16-bit, 44.1 kHz or greater)² while video formats are not,³ and that the video format question will certainly need to be fully agreed upon before the project begins. In addition, your archive might have specific needs regarding the legal releases for the project or, in the best-case scenario, have an in-house legal release already prepared for you to use or adapt. Both the minute details regarding these files and the broader legal framework need to be well established before your first interview is conducted.

It is also important to distinguish between two possible archival workflows in oral history: one for the projects that are currently in process, and one for those that are archived once work is complete. At the end of a project, it is much easier to consolidate data and create the proper redundancies to preserve all the material before the official handoff is made to the chosen archive for long-term storage. However, in the middle of a project, there are any number of sources and repositories for data, particularly when multiple interviewers are in the field, and the number is even greater if multiple personal accounts are used to store and transfer data. Even though the digital world has gifted us with extraordinary platforms for storing and sharing data, it can also vastly complicate the archival process compared to the former analog world which consisted merely of physically transporting tapes and paperwork to the office. No matter which of these approaches you choose, in the twenty-first century, the capability exists to produce a pure digital version of your entire oral history project. Choosing to go “full digital” is a decision every project director will need to consider before embarking on a single interview. When first planning a project, this concept can become a major driver in how all material will be ingested, managed, and ultimately deposited. Pure digital representation opens the door for massive connectivity and preservation opportunities, but it also places greater emphasis on protocols. The presence of an overarching plan for proper storage and transmission of digital files is an absolute must for any project that features remote interviews. In the following sections of this chapter, we will cover the tools, policies, and special considerations needed to successfully execute such a plan for both hybrid and full-remote oral history projects.

Digital Policies for Interview Preservation

Scanning/Digital File Protocols

Now that media recording is solidly entrenched in the digital age, the decision to go “full digital” is typically centered on the other materials collected as part of the oral history process, namely forms, images, and other ephemera. For forms, a decision should be made at the beginning of the project if form-fillable digital versions of your documents will be created and used, or if the forms will remain physical but will be scanned upon arrival to the accessioning process. For forms requiring a signature, a variety of software platforms exist to manage e-contracts, and these will be discussed later in this chapter. For images and ephemera, these two-dimensional objects are typically scanned and returned to the owners for use later in the project. At Baylor University Institute for Oral History (BUIOH), we often bring a portable scanner to on-site interviews to help accomplish this task, as well as the requisite gift form to cover the use of these additional materials. No matter your policy on capture of these materials, care must be given to track the resulting files and pair them with the corresponding interview media throughout the length of the project.

Naming Conventions

The best way to properly track a wide range of digital files is to use a standardized naming convention. This practice will enable unique identifiers to be easily

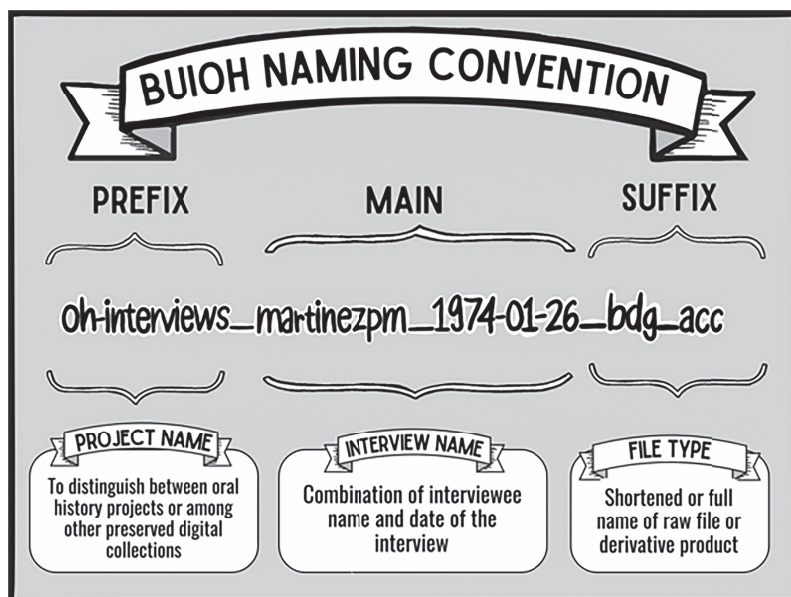


FIGURE 7.1 BUIOH Naming Convention

created for all interview materials while allowing varying file types to share a base nomenclature. Sometimes this naming convention will also include elements that frame the objects within a broader collection so as to differentiate them from other digital collections. For example, BUIOH utilizes a prefix of “oh-interviews” to denote the collection, and then afterwards other elements of the file name are separated by underscores (see Figure 7.1). Note that within each section, dashes are used instead of underscores when the need arises to further separate elements. At the end of the base naming convention, you can then add a final underscore followed by the type of object/object name, such as “_transcript” or “_raw-audio-track-02.” While you do have a certain amount of freedom within this system, the remaining rigidity will provide clarity when arranging an entire project’s worth of materials, as well as set your materials up for success when archival accessioning begins.⁴ Finally, as with many other elements of an archival partnership, you may want to inquire with your partner institution as to their preferred nomenclature before creating one of your own.

File Redundancy

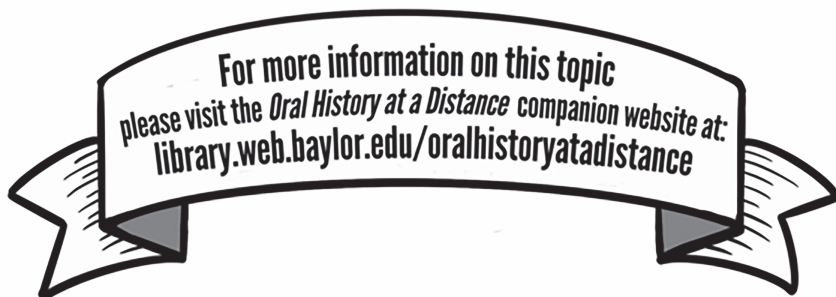
In the digital preservation world there is a term known as LOCKSS,⁵ which stands for “lots of copies keep stuff safe.” While this is great advice in general for anyone in charge of preserving digital files, for those working on an oral history project, it can have even greater importance as the person or people handling digital files are not always trained preservationists and therefore are often not aware of or do not always have access to the proper tools needed for the job. Despite these potential shortcomings, the digital preservation landscape of the twenty-first century does offer a bevy of options to get the job done, many of which will be covered in the next section. For the purposes of defining redundancy, however, it is enough to know its basic principles: creating multiple copies of files (especially original media) and storing said copies on different platforms located in different physical locations so as to prevent total loss from any number of catastrophes. These platforms and locations can even be a mix of old and new technology, just as long as each is still viable during the length of time they will be called upon to function, which, for most oral historians, means up to the point of archival transfer. Oral historians, therefore, must always remember that they will play this additional role in the life of their project until it is safely deposited with an archive.

File Fixity and Checksums

I feel it is important to introduce a concept here that typically is only encountered in the realm of data managers: file fixity. At its core, file fixity refers to the process of determining and assuring that the data that constitutes a digital file remains pure. A catastrophic loss of this data would render a file corrupted and unable to be accessed, though a lesser form may go unnoticed

yet still impact the product. A common cause of this lesser outcome is bit rot, which is the slow degradation of small bits and bytes of data over longer periods of time. To counter these issues, data managers will typically “refresh” their holdings, or even transfer large amounts of data to new depositories. To be clear, this is not a simple policy of backing up data to another location but a more routine maintenance of data.

For the average oral historian, these policies may seem quite foreign or unattached to their roles in creating historical records. However, there is one distinct action practitioners can take that will aid everyone in the future who handles the digital data from their project: creating checksums. A checksum is a type of digital snapshot that exists as a separate small file and typically lives alongside digital objects or folders of objects in a preservation structure. These files represent a kind of blueprint of their corresponding file(s) so that if the files are copied to another location, those copies can be analyzed against the original checksum to determine whether or not the data in the copy is a faithful representation of the original. Checksums are vital when large copy operations are executed but can also be useful to oral history practitioners as they move large media files from one drive to the next.



Several free applications enable users to create checksums on their own, and these practices are usually reserved for the original recordings, or preservation masters, and not the subsequent copies created to share or work from, though any major produced work would likely warrant preservation in the end and therefore its own checksum as well. Checksums should be stored at the same location of the original file and thereafter carried forth wherever that file may be deposited.

Metadata

Loosely defined as “data about data,” in an oral history context, metadata can include any sort of description of the interview that either digitally lives

alongside the raw media files or is possibly embedded within the media files themselves. For the purposes of preservation, special care should be taken that any descriptive elements of the oral history process (which can range from early research notes to transcripts and/or to data entry forms) that are created either before or after the interview itself are included in the directory of documents for that particular interview. Additionally, many media-editing platforms allow users to embed metadata fields directly into media files, so this can be another opportunity to properly describe a digital object. For example, BUIOH uses WaveLab to create both our preservation and access audio files, and as part of the accessioning process, we embed ten fields of metadata about the interview into the preservation file.⁶ This means that no matter what might happen to this particular media file, any user will be able to open the file and view this data to gain a basic understanding as to its contents and purpose. Metadata in general is also very valuable for discoverability once oral history materials reach the point of archival access, so the more attention paid towards proper description and preservation of this data in the early phases of the oral history lifecycle, the greater the dividends to an interview's ultimate usability.

File Categories and Transfer Paths

Most recording files in the digital age are going to originate in one of three locations: the physical media inserted into the recorder, the physical drive designated on a computer, or the cloud server that corresponds with the recording platform. Determining the best way to transfer these files during the oral history process can not only have an effect on the efficiency of the derivative work process but can also determine the quality of material designated for archiving.

The best rule of thumb for any scenario is to try to limit the total number of moves an original file makes between the time it is created and when it is placed on its ultimate preservation destination. When it comes to these original files, they should either be treated as the preservation master itself, or as the raw files that will constitute the preservation master in the first stage of production. Either way, these are items that should be preserved at all costs, and properly tracked and checksummed until they arrive at their final archival destination. For files generated on cloud-based systems, unless you are the owner of the cloud account, your only recourse is to download the files to a selected local drive and then begin the preservation process. This fact alone may determine your choice if using a platform that provides both cloud and local options for recording.

The act of moving or copying preservation files is fairly straightforward in most cases. For media used in physical recorders (almost always an SD card), you can either connect a USB cord from the recorder to the computer with

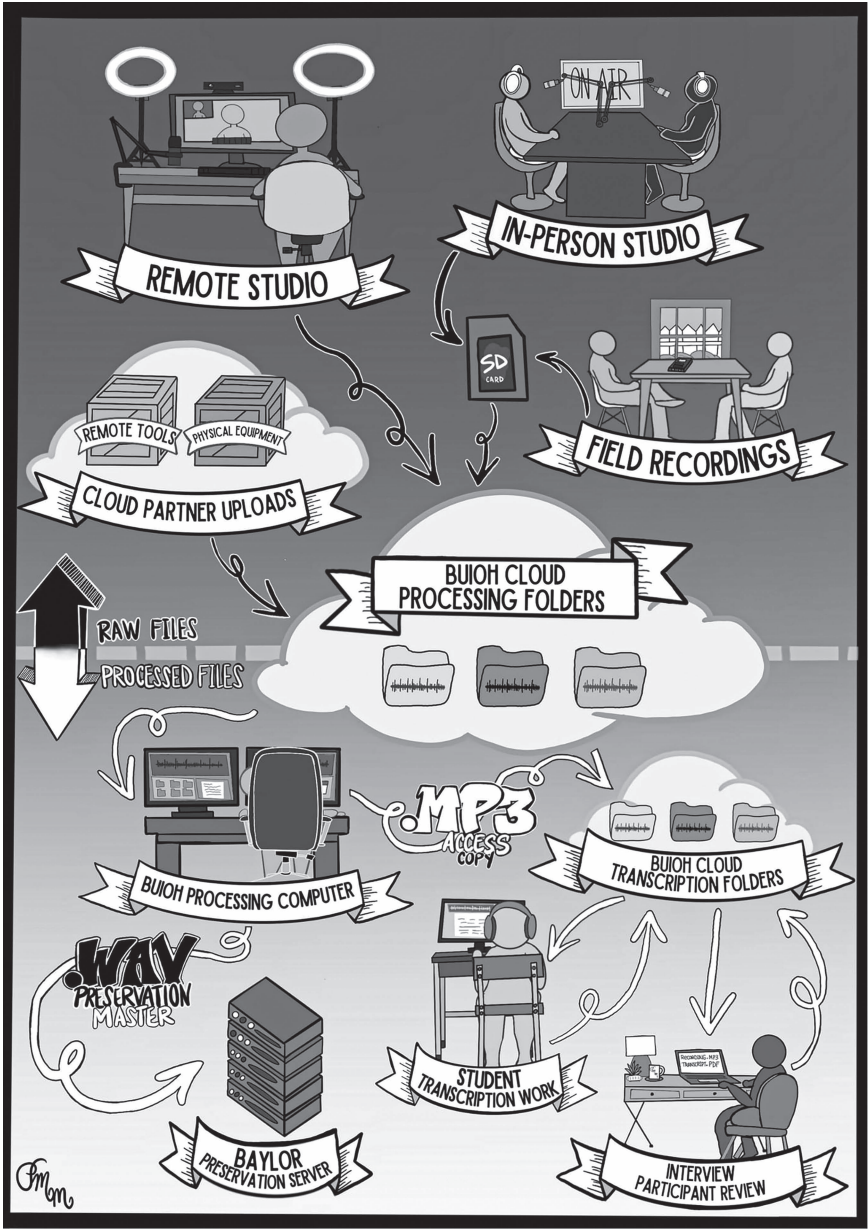


FIGURE 7.2 BUIOH Processing Workflow

the destination drive and transfer it via that particular recorder's process, or you can remove the SD card and insert it into a card reader attached to the computer and "open" the card as a connected drive. Of these two I recommend the latter, as it enables you to create the initial checksum on the SD card itself before it is ever copied. For recordings made directly on a computer hard drive, use the same methodology as the connected SD card to transfer the files to the preservation drive of your choice.

Beyond the preservation files, you may also use file compression in your media-editing software to create two other categories of files: a mezzanine file (not as large as the preservation but compressed to the limit of noticeable degradation of quality) and an access file (highly compressed, occasionally passed through quality filters, and designed mainly for derivative work or low-bandwidth online access). If you plan to create and store these other file categories, anticipate each mezzanine file to be half the size of the original and each access file to be around an eighth the size of the original. As you can see in the previous illustration, at BUIOH we utilize MP3 access copies of our preservation master WAV files for the bulk of our transcript editing and review work.

Digital Tools for Interview Preservation

Storage Devices

The term *digital footprint* (the total digital storage requirement for your project) is helpful to consider before you begin a project to determine your best short-term and long-term storage options. My rule of thumb for calculating this at scale is that a typical hour of preservation-quality recording requires 1 GB of storage for WAV audio and 15–30 GB of storage for HD video. This simple disparity should be enough for most oral historians to realize that a video-based project is going to require a much larger investment in both original recording media and the ultimate storage devices.

Hard Drives

Hard drive refers to either an internal or external storage device, of which there are two main types: mechanical and solid state. Mechanical drives were the original technology and are still widely used today, the name denoting the mechanical parts contained within and required to physically search within the drive space of the unit when data is accessed. Solid-state drives have abandoned these moving parts and instead use on/off charges of electricity within a field of transistors to indicate data locations, allowing the searching and loading of data to happen as fast as the speed of that current. While most computer experts recommend solid-state drives for their increased speed, the

fact remains that both types of drives can fail for different reasons, and both should be considered an acceptable choice for multiyear preservation but not an end-game solution for long-term archiving.

Cloud Storage

Most oral historians have probably heard of the term *the cloud*, and an ever-greater majority are now forming an understanding of what it denotes. For the purposes of this preservation discussion, the cloud refers to any platform service that allows you to store data on their company's servers rather than storing it locally on your own devices. Cloud storage usually comes with an introductory total storage limit or tiered subscription plans to increase said limits. Many of these services provide redundancy features so that your data is actually stored on multiple servers at any time allowing for quick recovery of corrupted or deleted data. Additionally, many recording platforms now also offer cloud-based recording options so that when the session ends, the recording is immediately uploaded to their own cloud system where users can either access or download the data. This is an important distinction when considering the value of the cloud in a preservation plan. Recordings that are born in the cloud eliminate the ability to perform an initial checksum and are quite often inferior in quality to local recording options. Overall, cloud storage is an effective avenue for backups and for sharing workflow material but may not be the ideal choice for primary preservation depending on the size of your project.

Cold Storage

A handful of businesses such as Amazon Web Services⁷ offer a type of digital storage known as cold storage, which denotes the policy of placing data on a platform with the overall intent of not accessing it unless something catastrophic happens. Cold storage is typically very cheap as any bandwidth needed for continual access is removed from the cost equation. This is a viable option for multiyear storage of preservation files, a sort of "set it and forget it" while you work on your project, that can be accessed only at the end to gather the complete preservation set and then deliver it to the archive.

The Archive

Simply put, hard drives, cloud storage, and cold storage options are great tools to preserve, back up, or share copies of materials during the life of an oral history project, but when it comes time to archive for perpetuity, a professional data management plan handled by an institution staffed by professionals that employs multiple large-scale storage and redundancy protocols is

the preferred long-term solution. The main goal for any oral historian should be to carefully shepherd digital materials using these policies and tools so that they arrive safely at the archive's doorstep. One additional consideration for archiving in the twenty-first century is that there now exists a category of online archives (many offering free or discounted rates to nonprofit entities) that do not possess the physical nature of their kin but specialize in both preservation and accessibility of digital content. The Internet Archive (and their amazing Wayback Machine where users can browse the history of the web)⁸ is the most famous example of this kind of service, though an ever-growing number of other options are now available, a boon for those with pure-digital collections who lack a local or institutional link to a classic brick-and-mortar archival partner. As with traditional archives, however, make sure to conduct research on the policies and procedures of these entities before entering into a preservation agreement.

Special Considerations for Remote Interview Preservation

Additional Workflow Steps

Even if your project features quality workflows and policies when it comes to the proper preservation of in-person interview materials, the world of remote interviewing will more than likely force you to reassess said stipulations. The primary culprit is often the world of cloud-based storage, in that many of the platforms used to conduct media recordings default to storing the subsequent recording on that particular company's server for you to later locate and download. Therefore, project managers should be careful to include rapid retrieval of these files so that they can be placed and copied in locations familiar to the organization. Always favor options that will allow you to choose where the recording lives, as this allows you to dictate your own terms when it comes to availability and quality. As an example, when BUIOH built its remote interviewing nook in its recording studio, Zoom was chosen as the inaugural video-recording platform, but more specifically, the "record to computer" option was preferred in that it was not only a higher-quality recording but also allowed our staff to direct the resulting recording files into our own pre-organized accessioning directory powered by Box. This allowed the files to instantly live alongside other relevant materials no matter which project or partner created them, as well as circumventing the 180-day cloud-recording deletion policy Zoom places on any recordings stored on their own servers.

Another major consideration in remote media file processing is the actual file type created. As previously discussed, many times remote platforms may not be able to provide a true uncompressed audio format, which will force you to transcode a compressed file instead, either ripping it from a video file

or “expanding” it from another audio format. While you will never gain data moving backwards from compressed formats to uncompressed (the increases in file size remain but merely represent the duplication of bits of data to fill out the uncompressed profile), your archival partners or preservation departments will still want these agreed-upon formats for long-term storage.

Finally, many remote recording platforms can provide you with multiple media file representations for the same interview. BUIOH currently downloads combined MP4 and M4A files, as well as separate M4A audio tracks per participant when a Zoom interview concludes. Exactly what to do with all of these files when you are accustomed to saving a singular WAV file requires planning as well. For BUIOH, we save everything thanks to the unlimited storage in our enterprise Box account, but we use the combined files when it is time to accession/create preservation masters. If needed, the isolated audio files can later be employed if tricky areas of crosstalk need to be transcribed or if another media-based derivative project, such as a documentary film, can better utilize them.

Levels of Access

In addition to file location and quality concerns, the various permission structures present in many digital platforms for recording can present challenges when it comes to proper access and inclusivity. To begin, any new piece of technology, even hardware, can create a gating effect among a team of oral historians when it comes to who has the experience and skill required to complete portions of the project. Establishing an account with a particular online service usually means a single person or email is tied to that subscription, requiring an open policy of sharing or diligent organization on behalf of the primary user to enable others to access both the tools and the resulting recordings. Access becomes a major issue in this sector when you have multiple individuals using the same service. At BUIOH, we decided to assign the office manager the duty of scheduling Zoom interviews but added the feature that all staff members were listed as cohosts on the meeting, meaning that any one of us could log into the studio computer and launch a scheduled Zoom session if needed. This new version of shared authority in our remote oral history methodology featured redundant protections for scheduling conflicts and seemed to manage anything we threw at it, until our office manager transferred to another department on campus. We then had to reconsider that first stage of access—the actual scheduling of the interview—and which person or persons would take on the new role. The moral of this story is something my predecessor Elinor Mazé used to call “the Mack Truck contingency”: that is, to always be on the lookout for siloed knowledge and access, as you never know what semitruck-sized issue may be lurking around the corner to hamstring your entire process. Therefore, when choosing one

or more of these platforms to enable your remote interviews, make sure to share needed information and responsibilities so that access to recording files or even the ability to simply set up the interviews in the first place do not suddenly vanish from your project.

Digital Signature Software

Well before the COVID-19 pandemic, oral historians grappled with how best to obtain the coveted signature on the interview contract or deed-of-gift form, ensuring that their subsequent work would be legally protected. Since the onset of the digital age, a forgotten opportunity on the day of the interview or generalized narrator hesitancy extended the logistics of this form to the realms of email or scanners. Remote interviews now necessitate these considerations, even for those of us who are extremely diligent and wish to have all of our forms complete before the recording begins. As with any other legal matter, it is best to begin with a consultation with your organization's legal department or your archival partner's policy when it comes to electronic or virtual signatures. If acceptable, the aforementioned methodology of transmitting an electronic version of a form for the narrator to print, sign, scan, and return is certainly acceptable, but there does exist an entire sector of e-signature services now to provide an automated process for sharing and retrieving these documents if you are willing to research and pay for it. The Oral History Association's (OHA's) Remote Interviewing Task Force compiled a list of these services,⁹ and there will no doubt be more to add to the rolls in the coming years as businesses of all stripes move more and more of their operations to the remote world. BUIOH uses one of these services which is integrated with our cloud-based solution, named Box Sign. For us, the ability to stay within one ecosystem and designate directories for completed contracts that lived alongside all of our other collected interview materials won out over all other third-party solutions, and it continues to serve as the primary methodology of obtaining signatures from remote narrators.

Online Security Policies

Whenever an oral history project employs an exterior software platform that has access to interview materials (whether used for the initial recording of interviews, a server to store materials, or even a tool used to transcribe or subsequently process transcriptions from supplied recordings), managers need to fully consider the impact the platform has on the digital safety of said materials. Depending on your institution's privacy policies, which can further be impacted by specific restriction language made by narrators for individual interviews or projects, some of these platforms may be off-limits. While these platforms are too numerous to list here and their policies evolve

too frequently to be able to represent accurately, what can be advised is that for each platform utilized, the following considerations should be raised:

- Does the platform maintain access to uploaded material even after it is deleted from the user's account?
- Who else technically has access to the user's private data?
- What sort of data encryption methodology does the platform use?
- What sort of policies does the platform have in place in case of a security breach?

On the project administrator front, special consideration should always be given to projects or interviews that by their nature include anonymization, restrictions for use, or even phases of review during which some material may be openly worked on but later closed entirely to access for a certain period of time. Location of the interview/nation of citizenship for those involved can also impact these decisions, as certain regions of the world have strict legal policies regarding proper handling of data containing personal identifiable information.¹⁰ Finally, it may be best when conducting a project that contains a certain amount of restricted or sensitive material to plan for non-remote options for recording of specific interviews in order to maintain the highest level of security via localization of all recorded files and derivative products.

Conclusion

One thing to always keep in mind regarding the proper care of your oral history project materials is that there is an entire industry of professional digital preservation experts that study, write, and meet regularly about the ever-evolving standards of their industry. Because of this, there is a great amount of extant reference material and yearly updates to best practice to take advantage of, even if you define yourself as a preservation novice. The United States National Archives and Records Administration Preservation Guidance Resources,¹¹ the Association of Moving Image Archivists General Resources,¹² and the Association of Recorded Sound Collections Guide to Audio Preservation¹³ are all wonderful clearinghouses/manuals to browse and familiarize yourself with from time to time. Additionally, for those looking to learn more about the policies and procedures tangential to preservation, you can read more about the wider world of oral history archiving in the OHA's "Archiving Oral History: Manual of Best Practices."¹⁴

Notes

- 1 Nancy MacKay, *Curating Oral Histories: From Interview to Archive*, 2nd ed. (Walnut Creek, CA: Left Coast Press, 2016), 49.
- 2 Douglas A. Boyd, "Digital Audio Recording: The Basics," *Oral History in the Digital Age*, 2012, <https://ohda.matrix.msu.edu/2012/06/digital-audio-recording/>.

- 3 Suggested video formats for preservation include MP4, AVI, and MOV.
- 4 For more on how a naming convention aids in the general workflow of interview materials, see Chapter 4, “Managing Remote Projects.”
- 5 “Lots of copies keep stuff safe,” Dictionary of Archives Terminology, Society of American Archivists, <https://dictionary.archivists.org/entry/lots-of-copies-keep-stuff.html>.
- 6 The amount of metadata you collect for and/or use to describe your oral histories can vary based on the needs of your project or the policies of your institution. For the past ten years, I have served on the Oral History Association’s Metadata Task Force, which has conducted surveys, published articles and white papers, and even created a comprehensive metadata field list and companion tool kit to aid oral historians in properly describing their interviews. You can find the work of the task force at <https://oralhistory.org/metadata-assessment-and-planning-tool/>.
- 7 “Amazon S3 Glacier Storage Classes,” Amazon Web Services, <https://aws.amazon.com/s3/storage-classes/glacier/>.
- 8 Internet Archive, <https://archive.org/>.
- 9 “Visual vs. Physical Signatures,” in “Remote Interviewing Resources,” *Oral History Association*, published August 27, 2020, <https://oralhistory.org/remote-interviewing-resources/#8-visual-vs-physical-signatures>.
- 10 For an example, see the EU’s GDPR legislation (<https://gdpr-info.eu/>) and the Oral History Society’s special considerations statement (www.ohs.org.uk/gdpr-2/).
- 11 “Audio and Video Guidance: Resources,” *National Archives*, www.archives.gov/preservation/formats/audio-video-resources.
- 12 “General Resources,” *The Association of Moving Image Archivists*, <https://ami-anet.org/resources/general-resources/>.
- 13 “ARSC Guide to Audio Preservation,” *Council on Library and Information Resources*, www.clir.org/pubs/reports/pub164/.
- 14 “Archiving Oral History: Manual of Best Practices,” *Oral History Association*, <https://oralhistory.org/archives-principles-and-best-practices-complete-manual/>.

8

LOOKING AHEAD

Final Thoughts on Going Remote

Steven Sielaff

In the spring of 2020, the COVID-19 pandemic created a general environment of uncertainty and delay, but this transitional period also provided an opportunity for the emergence of new trends in the field of oral history. Long-held tenets of “best practice” were suddenly being challenged by those who prioritized the continuation of work over the impediments of global precautions. Now, several years removed from the initial outbreak, we are able not only to assess what impact this era of forced remote work had on our profession but also cast an informed glance into the future as to what major changes may soon await us. In this concluding chapter, I will attempt to summarize the major impacts and new developments I witnessed within the field of oral history, as well as predict what their natural evolution might be.

Lemonade from Lemons: Forced Circumstances Enable New Work

Rather than focusing solely on what was lost during the pandemic, I would like to acknowledge certain gains remote oral history work provided for practitioners. The first phenomenon is what I consider a natural extension of a phrase I use when discussing the transition from the late-analog age to the digital age of oral history: “the democratization of technology.” From large in-studio analog equipment to bulky suitcase-sized portable analog tape-recording decks, and then eventually the smaller cassette or DV tape equipment, recording technology for oral history has progressively found its way into smaller and smaller form factors with an ever-increasing number of features on board. By the time we reached the digital age, the options for mobile

recording kits were almost unlimited save for one factor: we still needed to all be present in the same room to execute the interview. While audio-only telephone interviews that prevented any visual interaction during the interview enabled scores of past oral histories to be conducted, a closer replication of the in-person experience was not widely available until the explosion of videoconferencing options which settled into necessitated ubiquity during the latter half of 2020.

After oral historians came to terms with what this new paradigm in work looked like, I noticed an interesting aftereffect in many projects. Suddenly many interviewers or project leads considered distance differently. Instead of distance serving as an impediment for the overall reach of a project, it was now merely a built-in consideration as to its structure. Put simply, the location of the narrator pool now influenced the technological design of a project, that is, which remote interviewing tools/setups would work best to include these potential participants. With the proper technological support, distance-to-narrator is no longer a limiter when it comes to the scope of a project, and this in turn creates a ripple effect in many other planning elements.¹ A project budget that was once cost-prohibitive could now include narrators from outside counties, states, or countries. Time frames, whether considering narrator availability or the time investment of the interviewer, are also now loosened when adopting remote interview methodology, potentially paving the way for either a larger narrator pool and/or quicker project turnaround time. As both an oral history educator and an archivist, I also am excited by what this potential shift in budgetary considerations could produce. What will it mean for the greater field of grant-funded oral history if half of travel-based line items are shifted to cover other expenses such as better equipment, preservation/accessibility needs, or any number of derivative outcomes for the project? Another interesting element for all oral historians to keep an eye on will be the adaptation of funding agencies themselves: will certain funders change their policies regarding travel, or, alternatively, will oral historians need to make a stronger case as to why in-person interviews are necessary in a world where remote interview methodologies are more and more common?

One last comment on this concept of remote interviewing liberating the oral history practitioner: monetary concerns are not the only affectatious element of traveling for interview work. Whenever oral historians participate in an on-location recording that requires travel to an unfamiliar location, there must always be safety considerations for those involved. Any sort of travel outside an individual's comfort zone creates the possibility of unknowable risks, which can be heightened for those of particular ages, genders, or simply those who find themselves traveling in the company of thousands of dollars' worth of professional recording equipment. Transitioning away from on-location to remote interviewing mitigates these risks for your project team.

Breaking Out of the Frame: Reimagining the Standard Interview Setup

Whether we call it traditions, standards, or best practices, there are a number of technical elements to conducting oral histories that have long-established histories within the profession and its corresponding pedagogies. One such item is the standard frame-the-narrator shot most oral history videographers use and their consumers are well accustomed to. This and many other preparatory aspects of recording the interview have been turned on their heads in the new world of remote interviewing.² Now that remote interviews seem to be here to stay,³ how will their influence affect the methodology of recording prep and delivery?

Narrator framing in video oral histories is an obvious starter here. While not a monolith, the vast majority of the video interviews produced focus solely on the narrator, and the majority of those feature a static shot, which is to establish a certain amount of the narrator's body within a certain area of the recorded frame, and then to focus on maintaining that exact shot for the duration of the interview.⁴ However, when considering the vast array of video-conferencing options for recording remote video oral history interviews, the most distinguishable difference is that a video camera is now also pointed at the interviewer, and in many cases both parties appear together on-screen at the same time. The inclusion of the interviewer in a possible final product of the oral history recording is a major sea change, and this already impacts projects on the front end of planning. Many recording platforms allow for various options on who to capture on the recording and in what format (alternating full screen, equal screen throughout, etc.), so for the sake of continuity, this forces a conversation at the early planning stages of any full-remote or hybrid oral history project. If interviewers are now to be included in a video recording, they will also need to be on board with being in the frame, with all the comfortability and preparatory issues that might entail.

And what of the standard in-person video oral history kit? While traditional professional video cameras provide higher-quality video on average, certain equipment already exists that allows for 4K-resolution capture in a streaming environment.⁵ A leveled playing field may be upon us sooner than we think as more camera manufacturers consider the burgeoning live-streaming/video-communications market. Will the inclusion of interviewers on-screen in this new wave of remote projects lead other traditional projects to reconsider their framing formats, as well as the possible subsequent increased investment (i.e., Camera 1 + Camera 2) this would bring? Even established audio profiles used during video interviews may be affected,⁶ and they could require a re-imagination of inclusion and positioning to further highlight the interviewer's role in the process.

While on the topic of the potential changes to the role of the interviewer, a different aspect of remote interviewing could swing the pendulum the other

direction, possibly approaching near-obsolescence. Oral history has long shared space in the public sphere with similar interview-based methodologies, and as professionals from all walks of life embraced remote-communication solutions to aid them in their work during the pandemic, many platforms began offering features that would benefit a diverse population of users. Those interested in capturing memories now had any number of tools at their disposal to accomplish this en masse and could format the onboarding of participants in a variety of ways, some of which require very little participation on the part of the collecting institution.⁷ What impact do these tools have, therefore, on the traditional role of the oral history interviewer? Are we reaching a point in the profession's lifespan where the ability exists for a machine to do the job of a human interviewer? While I would readily guess that most oral historians would recoil at this very idea, there exists both current technology/practice,⁸ as well as ominous/promising (depending on how you choose to look at it) developments in the field of artificial intelligence⁹ that could lead many to wonder if, in fact, a machine could not only guide a narrator through a bounded Q&A process but maybe one day could even facilitate a certain amount of responsive/reactive questioning analogous to an oral historian's standard follow-up question methodology.

Far be it from me to leave my fellow practitioners staring hopelessly into a cold, mechanical abyss, so I will conclude this section by focusing on a different potential technological breakthrough that I believe holds immense promise to empower rather than replace them. Whether it be external pressures to provide better access to communicative accommodations (within the United States such as the Individuals with Disabilities Education Act [IDEA], the Rehabilitation Act of 1973, and the Americans with Disabilities Act [ADA])¹⁰ or internal foci on accessibility to reach a broader audience, captioning services have mirrored automated transcription services in their general availability. Even more recent is the push beyond finished products to live captioning services for everything from live events streamed by non-profits to private communications. While the proliferation of captioning is certainly a welcome addition, the possibility of this morphing into something beyond the native language is even more thrilling to me. When I attended InfoComm (a professional audiovisual trade show) in the summer of 2022, I spoke to several companies who were attempting to cross this threshold and make it possible for individuals on opposite ends of a videoconferencing platform to communicate despite speaking separate languages.¹¹ Currently the threshold to obtain this level of accessibility is either the purchase of separate localized hardware or enough cloud-based processing power to keep up with real-time translation on the screen, but given recent advances in technology, one would have to believe that this functionality will certainly be available in the near future. The implications (outside of the public/corporate structures where most of the investment is currently focused) are staggering: imagine

having the ability not only to record an oral history with someone halfway across the world but being able to do so without a shared language.

Additional implications also exist for real-time possibilities of transcription/translation into derivative materials. While automated speech-to-text platforms have grown by leaps and bounds, they almost always happen after the interview, often with the guidance of a human operator. With enough computing power and bandwidth, however, simultaneous self-correcting transcription or translation could provide us with a “95 percent accurate or better”¹² derivative product mere minutes after the interview concludes. Considering the scores of man-hours¹³ spent in the whole history of our profession to produce even the most rudimentary versions of these products, this will be a massive sea change for oral history and will almost certainly affect every project design and budget moving forward.

More Options, More Problems (and More Money Needed?)

While it is always nice to have options in life, too many options can lead to analysis paralysis via the dreaded tyranny of choice. As evidenced by Chapter 6, “Remote Recording Technology,” even after making enough decisions to lead you to a particular type of recording solution, you will still need to assess the various companies/platforms that provide that particular solution and make a choice based on the particular ecosystem/budget constraints under which you or your institution operate. Even after choosing and employing a particular solution, there will exist the need to evaluate and research new options in the future. My own technology resource page¹⁴ requires biannual updates, which I have tied into the Institute for Oral History’s (BUIOH’s) “Getting Started with Oral History” e-workshop offerings, and I feel six months is a good general measure of time when it comes to reevaluating the technology landscape. Alternatively, you may want to consider further shifts or tweaks to your platforms after each distinguishable phase of your project, or perhaps in the interim periods between projects. Judy Hughes, owner of Shenachie Productions in Melbourne, Australia, shifted technologies multiple times based on her experiences with and needs for three separate COVID-19 pandemic-era projects:

In reassessing the remote interviewing setup for each project, I looked at each previous project in terms of the technology used, the technology emerging, and the needs of each interviewee based on their technical expertise. Each project trialed something new, and so it was important to convey to the interviewee that remote interviewing was evolving and that their input was very helpful in these difficult times.¹⁵

Beyond these universal technological considerations, there are a few other items to keep in mind when adding remote options to your oral history

project. A list of equipment needed to execute an oral history project is typically one of the first items to find its way onto a budget sheet. Determining the flow of data and what supplementary expenses (memory cards, portable drives, etc.) result from a solid data-retention plan also impacts your bottom line. Both of these aspects of your project will need to be considered and funded a second time should you decide to add remote interviewing to your classic in-person oral history project. While you may be able to actualize *some* equipment crossover between these two realms, the simple fact remains that the usual suspects for both interview capture and primary storage are vastly different. This is one reason even Fortune 500 companies struggle with defining and executing a hybrid work environment.¹⁶ Therefore, if you do plan a hybrid project, be very aware of the duplicative pecuniary costs of doing so, as well as the additional human cost of both learning and running at least two recording environments. Finally, as mentioned in the remote recording chapter, if you decide to augment your narrator's remote capture environment by either purchasing outright or loaning equipment, you have now created a third tier of expense and technical support to manage.

This is not to say that hybrid projects are not doable or cannot be properly administered. At BUIOH, we have facilitated the work of several partners who oscillate between in-person and remote interviews, but there was certainly a learning curve for us. The first major challenge was incorporating a system of data tracking and storage for after the interview. This eventually led us to launch a pure-digital accessioning process where no matter what format or container the data was stored on, each interview was afforded the same digital file structure on Box, our cloud-based enterprise work solution. In such a system, this means in-studio interview media is uploaded from the original SD card and any physical sheets of paper scanned, while on the remote side, our local Zoom recording files and subsequent digital data forms are also placed directly in the same "BUIOH Collection Process" directory. From that point, any additional forms needed or data sets collected are transferred to the unique folder for said interview until it is time to accession, preserve, and process the files for eventual transcript production and online access work. Creating a single ingestion point, no matter the style of interview, has been key for us maintaining a streamlined workflow, and this will continue to be relevant to our work, as since the outbreak of the COVID-19 pandemic up until the time of this writing, a full 46 percent of all interviews accessioned at BUIOH were remote,¹⁷ and we see no indication of that trend changing any time soon.

All this new technology can rightly lead to another major problem: the more intricate the technological solution, the more reliant you become on the technological adeptness of both your interviewers and narrators. When assuming either familiarity or expertise with technology, most people rank teenagers or young adults higher on a shared spectrum than their elders. Even I sometimes brand myself an Xennial¹⁸ and immediately explain that means

I grew up with the advent of consumer technology and thereby have a more innate relationship with it even as it continues to progress. These sorts of labels, however, can be dangerous when they are followed by assumptions of a particular skill level when planning an oral history project. My further personal experience has taught me that younger individuals may only possess a superficial level of knowledge based solely on the expertise needed to run a particular app on their phone, whereas certain elders, especially in their retirement years, have innumerable hours to learn and tinker with the newest gadgets of the day, or spend a good amount of time in video chats with their grandchildren. In short, my advice here is to make no assumptions when it comes to your volunteer, staff, or narrator pools and to be equitable when it comes time to train them in the platforms and procedures you choose for your remote oral history project.

Missed Connections: How Do We Convey Respect in Our Remote Work?

Arranging a traditional oral history recording session is very much like planning for any other in-person meeting or small event. Introductions are made ahead of time, context is provided, schedules are negotiated, spaces are reserved, and then, finally, the event occurs. Quite often these interviews are the highlight of the day, and in many cases one or both parties spend a good amount of time preparing to be at their best once the recorder is turned on. In short, there is import placed upon this event. What happens to this dynamic, though, once the actualization of all this effort is simply another virtual meeting link on someone's e-calendar? Besides convenience, is anything else gained by this new format, or are we only left to lament what is lost? In this section, I will delve into both the realized and the more philosophical concerns a pivot towards remote interviewing could portend for our profession.

Let's start with the concept of the virtual meeting and how it can impact the general level of seriousness an oral history interview is granted. Those with busy calendars and those who work with others with busy calendars can attest to the musical-chairs nature that virtual meetings sometimes exhibit. If a physical room is not required and everyone will just log on from wherever they happen to be, suddenly the initial assigned time is not as sacred and can play second fiddle to the general availability of every participant, or even at times the priority of other events. How should we, then, convey this sense of priority to our remote oral history work? A large predictor of success here involves aspects of the pre-interview process. Explaining not only the procedures of an upcoming interview but also the importance of setting aside the designated time required is crucial for remote recording sessions. I would also argue that the methods of providing further reminders may be more effective if you utilize an older technology such as a person-to-person call rather than another email that may very well get lost in the shuffle of other

messages or relegated to spam/junk folders. I noticed this phenomenon fairly early after the outbreak of the COVID-19 pandemic when one of my student workers suffered from a litany of last-minute Zoom interview cancellations, most of which were planned during the narrator's office hours. This example alone may also contain a solid piece of advice: when possible, schedule interviews outside of business hours, even if it means your narrator still uses their place of business for the call, but only after the workday is over. Office environments have been frowned upon by oral historians for decades due to the high volume of possible distractions, so in many ways, this type of scheduling is merely a natural extension of the practice of protecting the overall quality of the interview.

On the flip side, we as oral historians need to be cognizant of any behaviors or project design elements that may be exclusionary or give our narrators the impression that we are not affording them the level of respect they deserve. In the 2022 survey of individuals who attended BUIOH's March 2020 "Oral History at a Distance" webinar, 63 percent of respondents claimed that the COVID-19 pandemic "influenced how narrators were chosen or prioritized" for their projects.¹⁹ An initial hurdle may very well be the simple fact that only certain interviews are conducted in a remote environment. Narrators might wonder why they are not worthy of an in-person visit, or an in-person invitation, especially if your project is hybrid in nature. Obviously, distance-to-narrator and travel budgets will play a role here, but it may be a good idea to consider your narrator pool as a whole and develop a policy that can be referenced later as to why certain environmental choices were made. Along this same vein, the choices made in how to connect remotely can say a lot about your priorities or general opinions on inclusiveness. For example, narrators in certain regions of the world may not have the same internet access opportunities many of us take for granted in the twenty-first century, effectively excluding them from videoconferencing solutions and instead relegating them to audio-only interviews via telephony. Overall quality of a remote video interview could also be impacted by those with enough internet bandwidth to enable videoconferencing but not quite enough to maintain a high-quality video feed or even stable enough to fully understand each other. Additionally, certain narrators, for any number of reasons, may also be hesitant to allow a video recording to take place in their house. These considerations alone can be enough to alter original project plans and force you to consider a shift to audio-only, or a focus on utilizing the same recording space for all participants.

We Have the Results: The Landscape Has Changed

Ninety-six percent of "Oral History at a Distance" webinar attendees who responded to the BUIOH survey felt that the shift to remote interviewing because of the COVID-19 pandemic would have a lasting impact on the

profession.²⁰ It is difficult for me to imagine, given the investment of time and money into obtaining the skills and equipment to actualize quality remote recordings, that we will ever retreat back to the days where the telephone was (sparingly) the only differentiation beyond the in-person experience. Ultimately, I believe we are headed for more hybridization, where products such as the prophetic Blue Yeti Pro²¹ are more the norm and oral historians have plenty of choices when it comes to the equipment they can either attach to their computers or take on the road. We are also more likely to see additional all-in-one efforts to provide oral historians not only the tools to conduct a remote interview but to integrate them with preservation, processing, and access software.²² I feel that as our populace becomes more and more familiar with long-form interaction at a distance, remote interviewing will only grow in acceptance by both granting institutions and potential narrator pools alike. How we decide to conduct these interviews and how we square them with previously established in-person oral history methodologies will dictate what the future of this profession will look like in the years ahead.

Notes

- 1 Baylor University Institute for Oral History, “Oral History at a Distance” Webinar Survey, Spring 2022. The quantitative findings from the survey are included in the appendix, while the full survey results are available on this publication’s companion website, <https://library.web.baylor.edu/oralhistoryatadistance>. Fifty-six percent of respondents claimed remote interviewing allowed them to interview previously unplanned narrators. Forty percent said they conducted more interviews than previously planned, while 29 percent said they conducted fewer and 27 percent said the amount was roughly the same.
- 2 For more on the webcam’s impact on the oral history method, see Chapter 1, “Introduction.”
- 3 BUIOH, “Oral History at a Distance” Webinar Survey. Sixty-two percent said they plan to incorporate remote interviews alongside in-person recordings moving forward, with an additional 6 percent stating they will primarily focus on conducting remote interviews from now on.
- 4 Scott Pennington and Dean Rehberger, “Quick Tips for Better Interview Video,” *Oral History in the Digital Age*, 2012, <https://ohda.matrix.msu.edu/2012/08/quick-tips-for-better-interview-video/>.
- 5 James Fowler, chief technology officer for the Association for Diplomatic Studies and Training, relayed to me in an informal interview that their oral history program has already executed remote 4k video oral histories utilizing the Z-Cam E2-M4 (www.z-cam.com/e2-m4/).
- 6 Many in-person video setups prioritize a boom mic or shotgun mic pointed at the narrator only, with the interviewer audio often captured “peripherally” unless a second channel/microphone is incorporated.
- 7 A few examples include the “Corona-Memory.Ch” project out of the Universität Bern in Switzerland (www.corona-memory.ch/s/corona-memory-fr/page/welcome), “In This Together” from the Chicago History Museum (www.chicagohistory.org/covid19history/), and the “Hawai‘i Life in the Time of COVID-19” project from The Center for Oral History at the University of Hawai‘i at Mānoa (<https://sites.google.com/hawaii.edu/hawaii-life-in-covid19/home?authuser=0>).

- 8 StoryCorps currently employs a “Great Questions” primer (<https://storycorps.org/participate/great-questions/>) for those who want to simply build a topic list in the style of a questionnaire, as well as a highly structured template for what their forty-minute interview model will look like (<https://storycorps.org/participate/what-to-expect/>).
- 9 Interviewer AI is a platform that currently allows their customers to conduct machine-driven interviews of prospective hires, complete with automated insights and scores (<https://interviewer.ai/help/what-is-interviewer-ais-video-intelligence/>).
- 10 Concerning oral history recordings, required captioning services are the major consideration as detailed in the National Association of the Deaf’s resource page, www.nad.org/resources/technology/captioning-for-access/when-is-captioning-required/.
- 11 ENCO’s enTranslate (www.enco.com/products/enrtranslate) is the most notable cloud-based solution, layered on top of their enCaption system and targeted currently for live-streaming events.
- 12 Ninety-five percent is my own standard based on testing and research of how long it takes to correct a certain number of errors per page vs. asking a trained transcriptionist to transcribe the entire interview from scratch.
- 13 See my blog post on this topic for general calculations on creating oral history transcripts. Steven Sielaff, “In the Oral History Toolbox,” *Oxford University Press Blog*, September 16, 2016, <https://blog.oup.com/2016/09/oral-history-tools/>.
- 14 “Oral History Technology,” *Texas Oral History Association*, <https://toha.web.baylor.edu/resources-and-newsletter-archive/oral-history-technology>.
- 15 Judy Hughes, “Oral History at a Distance: A View from Australia,” case study, Melbourne, Australia. (Located in Section II.)
- 16 The entire unofficial theme of InfoComm 2022 was the hybrid workplace and how best to make it equitable for both in-person and remote workers. After attending multiple education sessions and perusing two conference halls full of exhibitors, my major takeaway was that an elegant solution was not yet at hand, despite millions of dollars of investment both on the supplier and client ends.
- 17 Comprising 164 in-person, 129 Zoom, and 13 telephone interviews.
- 18 Xennial is considered a quasi-official micro-generation. “Xennials,” Wikipedia, <https://en.wikipedia.org/wiki/Xennials>.
- 19 BUIOH, “Oral History at a Distance” Webinar Survey.
- 20 BUIOH, “Oral History at a Distance” Webinar Survey.
- 21 This microphone featured both USB and XLR connectors and was the first of its kind I purchased for BUIOH that could perform in both settings.
- 22 TheirStory’s latest models include a number of these features, and the company hopes to launch a new open-source variant of their digital platform in the coming years.

9

AFTERWORD

Steven Sielaff

The world into which the vision for this publication was born has shifted dramatically over time. When my colleagues and I initially presented our webinar, “Oral History at a Distance: Conducting Remote Interviews,” we had years of traditional experience to rely on but limited exposure to the world of remote oral history. As this book came together, we came to rely not only on our own changing processes and procedures within the confines of BUIOH but also the shared experiences of friends and colleagues across the world. My own participation in cocreating the Oral History Association’s Remote Interviewing Resources mere months removed from the BUIOH webinar opened my eyes to a myriad of new pitfalls and possibilities for the field in a new world dominated by distanced needs. Equally as significant was the shift to a hybrid zeitgeist where in-person and remote interview protocols must both be thoroughly considered in order to be expertly executed.

Thankfully, we were able to coordinate the development of nine wonderful case studies to augment our work. The variety of support structures and general conditions these authors share with us bring much-needed context to certain themes in this book, in addition to providing our readers timely asides to dig deeper into particular aspects of the remote interviewing experience. As you read through each of these case studies, we hope you find them useful examples not only of new methodological practices in the field but also of the resiliency and adaptation oral historians often need to complete a complex project.

Equally important for us was the ability to reconnect with our webinar participants two years later to gather a set of both quantitative and qualitative data on what had changed for the profession as a whole. While every survey is a snapshot in time and the case can certainly be made for continual

similar inquiries, this data set inspired us during the writing process to connect our own work and theories with what those in the field were telling us. More than anything, the data confirmed for us that remote oral history practices are here to stay, and therefore, the work we have poured into this book will hopefully be of benefit to oral historians for many years to come.

Speaking of the future, one of our major considerations when tackling the topics contained in this book was to try and make its contents as future-proof as possible. Of course, any publication that deals with technology can often be outdated as soon as it hits the market. Anticipating this, the authors of *Oral History at a Distance* formulated ways to ensure the title would remain evergreen. First, we tried to stay as general in language as possible, providing proprietary examples when necessary but focusing more on the sectors and elements of technology one is likely to encounter. Second, while we are never prescriptive or endorse any particular product, we completely understand that some readers will actively seek out this advice, and that is where our online companion site comes into play. Based on a similar site I created for a past publication, the online companion for this publication is meant to stand the test of time through a series of scheduled updates in the coming years where new entrants in hardware or software lines will be highlighted, retired products and software programs will be noted, and new trends or resources can be linked to. Finally, to ensure the widest distribution and use of this work possible, Baylor University Libraries and the College of Arts and Sciences co-funded an open-access digital version of this book. We are thankful to the leadership of the university for enabling this publication to be easily available to all oral history practitioners, teachers, and students for use inside the classroom, out in the field, and beyond. It is our fervent hope that with these features, *Oral History at a Distance* will become an essential entry in the oral historian's library of knowledge.

Steven Sielaff
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SECTION II

Case Studies

Early in the process of discussing the content of this volume, the authors decided to incorporate case studies from oral historians who were actively conducting interviews during the COVID-19 pandemic. Whether by prior conversations, long-standing associations, word of mouth, public webinars, recommendations from our series editor, or general internet searches, we learned of a myriad number of projects and practitioners that would serve as representative samples of efforts undertaken during this difficult time. Contact was made with project principals asking them to summarize their efforts and reflect on what these new remote practices mean for the future of their work. Eventually we gathered nine case studies from across the globe that supplemented our own experiences and informed our writing. We are pleased to present these reports in their complete form in this section.



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10

INTERVIEWING REMOTELY

The Vietnam Center and Archive Oral History Project as a Case Study

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The Vietnam Center and Sam Johnson Vietnam Archive (VNCA) at Texas Tech University collects, preserves, and makes available to the public the documentary record of the American experience in Vietnam. Founded by Vietnam veterans in 1989, the VNCA has become the world's largest nongovernmental archive of the Vietnam War, containing over thirty million pages of documents and hundreds of thousands of photographs, slides, audio and film collections, and artifacts. In an effort to collect and preserve the voices of those who lived through those turbulent times, the VNCA established its Oral History Project in 1999. Since that time, the Oral History Project has conducted and preserved a rich collection of full-life oral history interviews with American veterans of the Vietnam War and with veterans' family members, war protestors, social activists, and Vietnamese from both sides of the conflict. Currently holding over 1,300 interviews, this project is a robust and ongoing effort to capture these stories before time and circumstance take them away. As with the VNCA's more traditional archival collections, the oral history interviews are made available to the public through the VNCA's digital online archive.

Unlike most other oral history projects, the VNCA Oral History Project conducts most of its interviews remotely and has since its inception. Circumstances dictated this approach. Given the nationwide—and indeed global—dispersal of potential oral history narrators for this project, traditional in-person interviews proved impractical. Additionally, the relative geographic isolation of Lubbock, Texas (home to Texas Tech University and the VNCA), largely precluded in-person interviews. Simply put, there was too much distance for too many people to make this project successful without embracing remote interviewing. In the days before the near ubiquity of

online communications systems such as Skype, Teams, Zoom, and the like, the VNCA embraced the old-fashioned but tried-and-true technology of the telephone, a technology that it still uses today to great effect. While interviewing remotely is certainly not ideal, there are numerous advantages over traditional in-person interviews, in addition to predictable drawbacks.

First, let's look at the ways remote interviewing can benefit an oral history project and promote a fuller and more satisfying interview. An oral history project that depends on in-person interviews often requires a significant outlay of resources for each interview, especially if travel is involved. With remote interviewing, there is no need for travel, lodging, per diem, or for making medium- and long-range plans for such activities, thus freeing valuable funds and time spent arranging for them. Another issue to keep in mind is the unanticipated cancellation or postponement of an interview; plans and outlays are of little consequence when changing a schedule can be affected through an email or a phone call. Remote interviewing also allows for tremendous flexibility when scheduling an interview, allowing for interviews to be conducted any day of the week and at any time that is convenient for both the narrator and interviewer, and offering the additional benefit of flexibility in the amount of time devoted to an interview session. Interviewing remotely can also be quite efficient in that an interviewer can conduct multiple interviews during any given day. At the VNCA, it is quite common for an interviewer to conduct two or even three interview sessions with different narrators each day, allowing for time zone differences across the country, and still have time to adequately prepare for each interview session between phone calls. VNCA's interviews are audio only, which is certainly a drawback, but these digital audio files require far less server space than video interviews, freeing server space for many more interviews, an important factor considering how tight oral history budgets can be (and too often are). A final benefit for an audio oral history project is that there is no up-front expense for quality video recording or for time and effort spent in the production of an in-person video interview.

Remote interviewing can also provide qualitative advantages within the interview itself. In a number of ways, a telephone interview promotes a higher level of comfort for the narrator. The telephone is a familiar technology to those of the Vietnam War era, and as such it requires no technical expertise or even familiarity that would be required for a Skype interview, for instance. Being interviewed in one's own home also promotes a sense of comfort and security, which is beneficial when discussing difficult topics of one's war-time experiences. A telephone interview at home allows the narrator to dress comfortably and not be concerned about their physical appearance while they are being interviewed, and there is no video camera to distract the narrator or to make them feel self-conscious. In addition to providing a more comfortable interview environment, remote interviewing can also promote

a higher-quality interview. Conducting a full-life interview in one sitting can be exhausting for both the narrator and interviewer, and remote interviewing readily allows for interviews to be conducted in multiple sessions over the course of whatever time is necessary. Shorter but multiple sessions over several days give the narrator ample time to think about prior sessions, allowing them to ruminate about what they have discussed, almost always spurring more memories offered in the next interview session. Those additional stories may be lost in a single-session interview without time for reflection. Conducting multiple-session interviews also provides additional opportunities to chat and build rapport with the narrator, promoting a closer and more trusted relationship with the interviewer. Finally, narrators tend to be more descriptive in a remote interview, knowing that gestures and references are of little value for an interviewer with whom they are not sharing a room.

Of course, there are drawbacks to the remote interview as well, and they are important to mention here. First, many narrators prefer to experience the interview process in person. If they are going to share their life's story with you, and especially if they know they will be discussing emotionally difficult issues, it is understandable that they would want to go through that process with someone they can physically meet, shake their hand, and look them in the eye. Remote interviewing by telephone also does not allow for gauging and recording nonverbal cues, which, as we know, can be an incredibly important aspect of any interview. There is also a measure of control that an interviewer forfeits in a remote interview. The interview environment, for instance, will vary according to each narrator; sometimes ambient noises can become distracting for both participants as pets, children, visitors, and the like unwittingly find themselves in the interview. There can also be less control over the flow of a remote interview when the narrator cannot see the nonverbal cues offered by the interviewer that might encourage them to provide further details of the topic they are discussing, or conversely to bring the narrator back on topic as is often necessary. These are all obviously important potential pitfalls for remote (and especially telephone) interviews, and not all oral history projects will be eager to embrace this approach. In the end, each project must approach its work in the way that best suits its needs and interests. Given the factors peculiar to the VNCA Oral History Project, remote interviewing has offered the only conceivable and realistic way to make the project as large and effective as it has been.

11

THE UTICA ROOTS ORAL HISTORY PROJECT

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Project Context

The Utica Roots Oral History Project seeks to collect, preserve, and disseminate stories centered around the theme of Southern black education in rural Mississippi. As the home of the former Utica Normal and Industrial Institute, now the Utica Campus of Hinds Community College, the town of Utica and the small farms surrounding it have long had a special relationship with the college. As a historically black college and university (HBCU), Hinds Community College's Utica Campus is the only center for higher learning in this rural location. Given the prominence of its founder, William H. Holtzclaw, the Utica Campus had an outsized influence on black education throughout the entire state, with many educators being sent out from Utica to establish rural schools of their own in the Tuskegee model. The stories of the pioneers of the civil rights movement are well-documented in many oral history collections, including the outstanding holdings of the Margaret Walker Center's Oral History Collection at Jackson State University in Jackson, Mississippi. There is a gap, however, in the stories of the experiences of everyday, rural Mississippians as they navigated the changes from Jim Crow to civil rights to desegregation. Given that in 1960, 63 percent of the state's African American population lived in rural areas, this gap represents a significant part of the Southern black experience that may be forgotten if we do not move quickly to record, preserve, and disseminate their stories. We believe the experiences of the Utica community provide an important window into this critical moment in American history.

Narrative

The Utica Roots Oral History Project was conceived as an outreach project of our new campus museum, the Utica Institute Museum. We received a National Endowment for the Humanities (NEH) grant in 2016 to explore the impact of William Holtzclaw's book, *The Black Man's Burden*, the first book published by an African American in Mississippi. That project brought scholars and educators together from Mississippi and around the country for a critical examination of Holtzclaw's impact on Southern black education, resulting in a bank of lesson plans providing the impetus for a more permanent home for our ongoing work with the museum. Oral history was an informal component of that initial project, but we knew that we needed to build a more solid academic framework for the work. With funding from the Institute of Museum and Library Services (IMLS), our Utica Roots Oral History Project involved extensive consultation with oral history professionals in both the project design and faculty training in oral history best practices.

While we are still in the early days of our project, one of the key lessons that we have learned so far is the importance of flexibility when undertaking an oral history project. Given that we started the project at the height of the COVID-19 pandemic, all our plans for in-person seminars and workshops had to be adapted for remote delivery. Our consultants were able to modify the plans we developed during the grant submission process to provide us with the training we needed. While I would have preferred our original intensive workshop approach with our team, one positive development from the distributed meetings is that the format did allow us more time to process the material we were learning in between each session.

With our grant funding, we were able to equip an oral history studio in one room of the museum. We envision a comfortable area where families can sit and talk without the pressure of a camera right in front of them. To that end, we are installing PTZ (pan-tilt-zoom) cameras in the ceiling with drop-down microphones for the recording apparatus to be as unobtrusive as possible. Another pandemic modification is that we are shifting our recordings more to outdoor/front-porch settings and possibly Zoom recordings. This has required quite a bit more juggling of schedules and limits the involvement of our students on campus, but it does allow us to continue recording while keeping our community members safe.

A primary outcome of this project is the development of oral history portfolios that our community members can use at family celebrations, in addition to the full-length recordings that will be made available in the oral history archives and provided to the families. Oral history portfolios include the raw audio/video footage, transcripts, metadata, family archival artifacts,

and a produced minidocumentary created by students from our Radio and Television Production and Broadcasting Technology program. These students serve as media interns and are hired to help families create short documentaries telling their stories. We are hopeful that we will be able to end the project with a community-wide celebration and screening of these documentaries. One exciting development stemming from this project has been all the connections that we have been able to make with our Utica community. Through Jean Greene's work publicizing the project on our community radio station's various talk shows, at First Friday farmers markets, and in alumni meetings, we have heard from college alumni and longtime residents who have put us in touch with folks from all over the country. Exploring these networks through our oral history program has confirmed something that Jean often says: "All roads lead to Utica."

As we have navigated all of the challenges of the pandemic, I am thankful that we had a detailed project plan in place as part of our grant-writing research. The effort that we put in on the front end to design the project helped us get off to a strong start and roll with the punches that the COVID-19 pandemic has thrown at us over the past eighteen months.

The importance of working with academics who have traveled this road before us cannot be overstated. Our project consultants and texts have enabled us to build a framework for oral history at Utica that is both responsive to community needs and accommodating of future growth.

12

BRIDGING DISTANCE IN PROJECT-BASED RESEARCH

The Cases of “Montreal Life Stories” and “Deindustrialization and the Politics of Our Time”

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The lone interviewer-researcher holds a dominant place in the oral historian’s imaginary, framing how we think about methodology and ethics. Yet oral history is a field where project-based research has always been central. Collaboration is therefore at the heart of oral history practice, both within the interview and project spaces. To be sure, most oral history projects are locally rooted, allowing face-to-face relationship building. Yet, increasingly, we are seeing trans-local, regional, national, and international projects. As a result, managing research projects remotely is not something that only began with the pandemic. It has a history.

Concordia’s Centre for Oral History and Digital Storytelling is a vibrant cross-disciplinary community of researchers, artists, educators, and community members. Much of the centre’s intellectual life is face-to-face, but it has been home to two large-scale projects. The \$1.5 million Montreal Life Stories project (2006–12) recorded the life stories of five hundred survivors of mass violence from around the world who now live in Montreal, and the project integrated their stories in theatre, film, exhibitions, audio walks, radio programming, and other outcomes. It was a massive project with 350 team members, very much anchored in survivor communities themselves. The project was, at once, global and intensely local.¹

The second project, Deindustrialization and the Politics of Our Time (2020–2027), or DePOT, was funded by a \$2.5 million grant from the “partnership” program of Canada’s Social Sciences and Humanities Research Council.² DePOT is examining the rise of right-wing populism amongst those left behind in deindustrialized areas across six countries including the

United States, Canada, United Kingdom, Germany, France, and Italy. Our partners include major research centres such as the Scottish Oral History Centre, industrial museums, trade unions, and archives. This project is more institutional than the first, though the partners are rooted in working-class communities.

I am introducing two projects, instead of just one, because my thoughts on managing oral history projects at a distance, as principal investigator (or director), were shaped by both of these projects. There is some continuity in my experience. A large project has many spaces, and team members need to constantly find ways to bridge the distance to break down silo-ization and unhelpful hierarchies. Both Montreal Life Stories and DePOT were also operating across multiple languages, which creates its own distance.

In thinking about project management at a distance, I would like to emphasize here the importance of project design, collective governance, community building, transparency, a common ethics framework, and collective reflexivity. Collaboration needs to be organic and not reduced to bureaucratic reporting requirements.

Montreal Life Stories

Project design is the most important stage in the development of any project. If it is truly collaborative, this initial step is also envisioned together. In Montreal Life Stories, we created six working groups, each with coleaders, and a central coordinating committee with representation from all corners of the project that was evenly balanced between university- and community-based members. To assist project-wide cohesion, we developed a mandatory five-hour training course which served to orient members to the project, its ethos, and interview methodology.

Ethics is often equated only with the interview in oral history projects. But we quickly learned that stories were being shared in all kinds of project spaces, such as in post-performance discussions, digital stories, our biweekly live radio program, or our regular meetings. What do consent, mitigation of harm, and withdrawal mean in these *other* spaces? Ethics is often predicated on the idea that in one corner we have the researchers and in the other the researched, and we are going to regulate that space in between. But with true collaboration comes blurred boundaries. What is even on or off the record?

We also created spaces of project-wide reflexive exchange. Some of these were in person, such as our regular debriefing sessions between interviewers, but they were also done remotely, via the requirement that project interviewers and videographers share a post-interview reflection within forty-eight hours. By project's end, we had nearly one thousand of these reflections that enrich our understanding of these interviews. These reflections were posted in our shared Basecamp cloud-computing space where much of our online

activities were located and our documents found. This area was accessible to all team members, ensuring transparency within the project. Internal communications such as our regular monthly newsletter gave team members a sense of project-wide progression. A five-year or seven-year project is a long time, so each year there was a culminating event, usually an international conference where our project mobilized and we were put into conversation with others around the world.³

Deindustrialization and the Politics of Our Time (DePOT)

This brings me to our new DePOT project. Our core project team grew organically via the snowball technique, which usually refers to interview recruitment but can just as easily be used in reference to building a large team. Only a handful of us were able to meet in person, and therefore much of the project envisioning occurred in Zoom conversations and as we collectively wrote the grant application in Google Docs. It is a beautiful thing to see eight or nine people beavering away writing and editing at any given moment. Many minds are better than one. The pandemic struck shortly before we were awarded the grant, forcing us to revisit some of our plans in years one and two. We redirected the funding into a series of previously unplanned initiatives aimed at building a transnational community and promoting a transnational exchange of ideas. First, we organized a series of six virtual roundtables on key concepts that considered how our understanding of economic change has varied considerably across time and space. These events drew seventy to a hundred people each, allowing us to forge new collaborative relationships across the globe. We then organized two more virtual roundtables, bringing together sixteen authors of recent books on special issues in the field, asking them to situate their work in the scholarship. The resulting historiographic conversation across the six countries was also a big success. Each roundtable resulted in a reflexive blog on our website. Internal to the project, we are again using Basecamp and monthly newsletters to bridge the distance and cultivate a project-wide horizon.

One of the challenges we face in undertaking transnational research is that there are very different ethics regimes in place from one country to the next. Oral historians must go through institutional review boards in Canada and the United Kingdom, while they are now (mainly) exempted in the United States. There are no ethics regimes in Italy, France, or Germany. Yet, because the funding is coming from Canada, we need to follow—as a project—the Canadian rules. How to do so? Luckily, oral history is a global community of practice with a shared ethos and methodology. There is therefore substantial agreement across our project team, and we have agreed to follow a single ethics framework, now approved at the home institution of Concordia in Montreal. Interviewers will need to complete a remote oral history workshop

to ensure we are all on the same page. Our team has already grown to more than seventy researchers.

Another issue that I would like to raise is what happens to the research gathered by team members at far-flung institutions? The DePOT project has developed a Research Commons, using SharePoint software on a secure server, where all of the recorded interviews, transcripts, and archival research is archived for the general use of team members. This way, everyone is everyone else's research assistant—building a transnational archive together.

We hope to have annual face-to-face gatherings once restrictions from the COVID-19 pandemic lift. To promote cooperation across distance, our first volume out of the project will feature chapters that are co-authored and that cross national borders, which ask team members to work together. For example, four affiliated graduate students whose master's and doctoral theses focus on gender and the textile industry are co-authoring one of these chapters. Their case studies, therefore, represent the four cornerstones of their transnational piece.

At project's end, our work will end with a transnational exhibition—not a touring exhibition but one that connects installations at up to a dozen museums across the six countries, breaking the sense of isolation many deindustrialized areas feel.

All of this to say that working across varying distances is an integral part of project management. I would argue against too great a bifurcation between “in person” and “remote,” as much of project work has always been a combination of the two. The key is to design projects that are flexible, reflexive, and creative.

Notes

- 1 For more on the Montreal Life Stories project, see Steven High, *Oral History at the Crossroads: Sharing Life Stories of Survival and Displacement* (Vancouver: University of British Columbia Press, 2014).
- 2 See the project's website at deindustrialization.org.
- 3 A number of books and special issues resulted from these milestone conferences such as: Steven High, ed., *Beyond Testimony and Trauma: Oral History in the Aftermath of Mass Violence* (Vancouver: University of British Columbia Press, 2015); Steven High, Edward Little, and Thi Ry Duong, eds., *Remembering Mass Violence: Oral History, Digital Media and Performance* (Toronto: University of Toronto Press, 2013); “Sharing Authority: Community-University Collaboration in Oral History, Digital Storytelling, and Engaged Scholarship,” ed. Steven High, Lisa Ndejuru, and Kristen O'Hare, special issue, *Journal of Canadian Studies* 43, no. 1 (Winter 2009).

13

MOVING PAST “ANALOG” REMOTE RECORDING

Total Recorder, TheirStory, and the UW–Madison (Wisconsin) Oral History Program

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This is the story of how two technology products, Total Recorder and TheirStory, saw us through the COVID-19 pandemic and taught us lessons that saved the day. I want people to know how valuable each product has become to our program during the pandemic and will continue to be utilized even after we return to primarily interviewing face-to-face.

Before the COVID-19 pandemic forced us into 100 percent remote operations, we occasionally conducted distance interviews, including two projects that we were wrapping up in March 2020. Those two projects—Madison General Hospital School of Nursing Alumni Oral History Project, 1947–1980 and University of Wisconsin System Restructuring Oral History Project—included narrators who did not live near our home base of Madison, Wisconsin. We conducted those interviews “analog-style.” My students called the narrators from my office phone, put them on speaker mode, placed a Zoom H2n recorder close to the speaker output on the phone, and then pressed “record” and conducted the interview. While not ideal, it worked.

When the pandemic arrived and our campus shut down, we continued doing the final interviews for those two projects that way, except our students conducted the interviews from their own homes, using their cell phones and following the same recording steps as noted earlier. In addition, we began conducting interviews about COVID-19 experiences, which we now call the Documenting COVID-19 Archives Oral History Project (DCAOHP). All those interviews, we assumed, would be conducted remotely, and I wanted to capture them in a less “analog” way. I knew we should and could do better, so I started to think about how.

Enter Total Recorder, a software application that provides basic functionality for recording, converting, and processing digital audio on PCs. My boss,

UW–Madison’s university archivist, Katie Nash, approved the purchase of this application in May 2020 for the grand price of \$18.95 for the Total Recorder Standard Edition. I’m so pleased she agreed. I have used Total Recorder for nearly eighteen months now with zero issues and have never even considered upgrading to fancier versions. Basically, for our DCAOHP and other current projects, this tool allows us to record any VoIP call, such as Zoom, Teams, Skype, or even my office phone since UW–Madison adopted VoIP for all campus phone numbers. And with just a few minor changes, one can record the call as a 16-bit/44.1 kHz WAV file.

Since Total Recorder doesn’t work on Apple products, we needed a backup plan. Enter TheirStory, a remote interviewing platform that helps communities collect, preserve, and engage with the audiovisual stories of their members. I met TheirStory’s founder, Zack Ellis, and he convinced me the product would serve us well. The University of Wisconsin General Library System purchased the entry-level package for our program. Like Total Recorder, it definitely ended up being money well spent.

As with Total Recorder, it was the COVID-19 pandemic that pushed us into purchasing and using TheirStory. We love having a platform that allows the narrator and interviewer to see each other (like other platforms), as well as offering up a WAV file as the digital audio master file (unlike other platforms). Plus, the ability to use it on a PC or Mac made this tool perfect for our ongoing oral histories projects, including the aforementioned DCAOHP.

TheirStory offers an automated transcription tool as an add-on, creating a draft transcript with a claim of at or over 90 percent accuracy. This allows our student interviewers or processors to go through that draft transcript, again using the tools embedded within TheirStory, to audit/edit the transcript fairly quickly. Most students can do this task in about twice the time of the audio file length, meaning it takes them about ninety minutes to get the draft transcript from a forty-five-minute interview to as close to 100 percent accurate as possible.

The bottom line, as in evaluating any product or process for oral history, is, how does it work for the narrators? Regarding Total Recorder and TheirStory, the main difference became explaining to our narrators during pre-interviews exactly how we would conduct this oral history. Because of the pandemic, most narrators understood the importance of social distance and why we used Total Recorder or TheirStory. We conducted a pre-interview with all our narrators and explained to them how we would record their oral history, why we chose that platform, and what would be expected from them.

In conclusion, tools like Total Recorder and TheirStory do remote recording the way it can and should be done with the available technology. With these two products, UW–Madison Oral History Program truly moved into the digital age in terms of how we recorded at a distance.

Postscript

Since I originally drafted this article (October 2021), enough change has occurred to warrant an addendum. First, the good news: we still use TheirStory, and while we have encountered the occasional issue or two, overall it has worked quite well for our program, so much so that others at UW–Madison, such as our Center for Campus History, use it for their oral history interviews. Now the bad news: after upgrading to a new laptop in the fall of 2022, both our tech folks and I could not get Total Recorder to work. So for us, when it worked, it worked well, and now we have moved on to mostly using TheirStory. On the rare occasion, I go back to our early pandemic virtual-recording process: calling my narrator on the phone and recording them with a digital recorder. Because the more things change . . .

14

A COMMUNITY CONNECTING DURING A PANDEMIC

Case Study for *Oral History at a Distance*

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The collection at the Oregon Jewish Museum and Center for Holocaust Education (OJMCHE) is the largest documented and visual history of the Jewish people of Oregon: those whose families arrived as some of the earliest European settlers, those who have arrived as refugees of the Holocaust and from the Soviet Union, and American Jews who have relocated to make Oregon their home. Our collections constitute the material culture of the Jewish community in books, journals, manuscripts, papers, photographs, maps, audio recordings, ceremonial objects, and ethnographic artifacts representing families, clubs, synagogues, businesses, philanthropic organizations, and community agencies from the mid-1800s to the present day.

As an institution committed to documenting the history and experiences of Oregon Jews, we became interested relatively early in the pandemic in capturing COVID-19 stories from people in our community. We were in the midst of exploring collecting options when the Council of American Jewish Museums (CAJM) sent out a call to member institutions for participation in a nationwide project chronicling the COVID-19 pandemic. Participating projects would collect stories from their regional Jewish communities about the experiences during the pandemic, as well as stories of experiences in and around the social justice struggles of 2020, the campaign year, the election and presidential transition, the wildfires, and, later, the development and administration of the COVID-19 vaccine. We eagerly joined the larger CAJM network in this large-scale oral history project in order to share resources and have colleagues with whom to problem solve.

This project was originally intended to run for eight months, from July 2020 to February 2021. We committed to try to collect 150 interviews within that window. I began actively recruiting and training volunteers in

July 2020, and I conducted our first interview on August 31, 2020. Due to the overwhelming success of the project, we extended the timeline through February 2022. We completed 233 interviews by the time phase one of the project was complete, and we have now conducted 276 interviews to date. Our oldest participant is age 92 and the youngest age 13.

Process used to undertake it

OJMCHE's core oral history project has been active since 1971. Through that project, we have collected over eight hundred interviews from the Oregon Jewish community. This long-term project has enabled us to develop effective training methodologies and recordkeeping practices. Our interviews had always been done in person, however, and the transition to a remote platform brought new challenges. We were forced to rethink many of our procedures.

A major benefit of working under the umbrella of CAJM was acquiring access to a sophisticated remote recording software called TheirStory, a preservation-oriented, remote-recording platform that collects all of the recordings completed for our project in one central location. It also offered us the ability for several interviewers to record interviews at the same time on the same account, thus enabling our thirty-five interviewers to schedule with flexibility. TheirStory streamlined the process so that as soon as each interview was completed, we could download, transcribe, and share the recordings. TheirStory is an intuitive tool, requiring very little training for the volunteers to be comfortable using it.

We recruited these volunteers in two ways, first by personally identifying potential interviewers and narrators from people already known to us in our museum community. We started an internal list and reached out to them directly. At the same time, we also sent out a call for interested people in the Jewish community at large; the response was astounding. In two days, I had thirty volunteers interested in conducting interviews and more than ninety respondents interested in being interviewed. Our internal list accumulated another ten interested interviewers. By the time we were ready to conduct interviews, two hundred people were excited to share their experiences.

It became evident I would need to streamline a way to respond to all the interested parties. I created a comprehensive set of email templates so I could respond quickly to potential interviewers and narrators and those who wanted to be both. I also used a color-coded spreadsheet to keep track of narrator and interviewer status. This allowed me to see the whole picture of where we were in the process. We created a set of broad-ranging interview questions that would be standardized for all interviews.

Once the interview software and the volunteers were in place, it was time to begin training. I marked out sixteen blocks on my calendar over six days

and sent an email asking all forty interviewers to respond with their availability. I trained the first set of ten interviewers in July. The other thirty interviewers were set to begin training in early September. A remarkable number of interviewers we trained stayed with us throughout the project. This retention rate is many times higher than it is for our core interview project.

I created training materials, including a PowerPoint slideshow with step-by-step instructions supported by screenshots directly from TheirStory screens, a checklist, and a project FAQ to help them respond to likely questions from narrators about the project.

After each training session, I scheduled individual mock interviews (of myself) for each interviewer to test their skill level operating the software and to allow me to troubleshoot any issues before they began an official interview. I also had the interviewers practice asking me a few questions to get a feel for both the question set and for actually conducting an interview. I would intentionally answer questions vaguely or with a tangent to encourage them to ask follow-up questions and practice guiding the interview. To move forward successfully, I created a set of templates, including the following:

- A joint note that would introduce interviewers and narrators, giving them details about what to expect moving forward.
- A note to interviewers providing them with language to use when communicating with narrators if they needed it. Some were a little nervous about reaching out to someone they'd never met before.
- Updates to the original question set as the changing landscape of the pandemic warranted.

With trained interviewers in place, I set about pairing each with a narrator. My narrator list was in order of respondent, chronological rather than alphabetical. This allowed growth to the list to be added as new responses came in over time, and it seemed the fairest in terms of wait time for those already on the list. In most cases, the next narrator on the list was paired with the next available interviewer.

My goal was to keep interviewers comfortable with the project. I didn't want the process to feel like work or an obligation, and I was delighted by the number of "strangers" I paired up who turned out to already know each other. Because we were in a state of isolation, this project was a huge morale boost for most of the participants.

Success rate

At the end of phase one, all but three interviewers were still participating, and our narrator list continued to expand by word of mouth. A large part of the success of this project was the "high touch" model I employed. By personally

connecting with every person involved, I could ensure that everyone was comfortable and engaged with the project. My job was to balance my focus on the big picture with constant attention to the individual experience. This led to an organized and engaging experience for everyone involved.

Lessons learned

Unless it is your sole duty, a project of this scale is difficult for one person to manage alone. The remote nature of the project made it possible for me to direct this project on my own, but it also increased the necessity for detailed organization. I was personally invested in this and willing to dedicate long workdays to the creation and management of this project. It was also easier to dedicate the time due to the home quarantine and lack of social engagements at the time. In retrospect, I would recommend having a small team to manage this scale of oral history project for both the development and actuation.

Advice for the future

Simplicity! Even a big project is easy to manage if you can keep it simple. Templates are essential, and using basic tools like Word and Excel are effective and approachable. Design your process ahead of time, and be ready to rework elements once you are underway as you learn more.

15

PIVOTING IN CRISIS

The Arthur Ashe Oral History Project at UCLA

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Chinyere Nwonye

Oral Historian, Arthur Ashe Oral History Project

Preface

The Arthur Ashe Learning Center (AALC) was established in 2007 to forward tennis champion Arthur Ashe's commitment to humanitarianism, education, and economic empowerment. In 2017 AALC found a new home at UCLA, Ashe's alma mater, and transitioned to a new name, Arthur Ashe Legacy at UCLA (AAL). During his time at the university, Ashe made tremendous strides on the tennis team. Not only was he the first African American on the team but he also became the first African American to win an NCAA singles title during his junior year and then led the team to win the NCAA tennis championship in 1965. He graduated with a degree in business administration in 1966, before continuing his rise as a star athlete, being the first African American selected to play on the US Davis Cup team. He also won three Grand Slam titles: the US Open in 1968, the Australian Open in 1970, and Wimbledon in 1975—of which today he remains the only African American man to do so. His accomplishments off the court were just as impressive: his activism in protesting apartheid in South Africa, his unwavering support of HIV/AIDS research, and cofounding the National Junior Tennis League in 1969.

AAL, led by Dr. Patricia Turner, manages a booth each year at the US Open and supports scholarships and internship programs for students at UCLA. In 2019, inspired by the stories shared by friends of Ashe at her annual Fiat Lux Seminar, Dr. Turner launched an oral history and archival project to serve as a resource for educators, students, researchers, scholars, and enthusiasts. I (Yolanda Hester) was hired that summer to spearhead the project, starting with conducting foundational research, crafting the framework, and locating

narrators. Chinyere Nwonye was hired that fall to help conduct interviews with an expanding roster of narrators.

The Center for Oral History Research at UCLA serves as the repository for the recordings. Although the project focuses on the life of Arthur Ashe, he also becomes the catalyst to document a much broader history of the latter half of the twentieth century. His life intersected with many pivotal historical moments such as the civil rights movement, women's movement, Vietnam War, Anti-Apartheid Movement, and HIV/AIDS crisis. Also, he was at the pinnacle of seismic developments in tennis, such as the Open Era and professionalization of the sport. To date we have recorded nearly ninety interviews of friends, family, and associates of Ashe.

Narrative

Our first interview was conducted in December 2019, and by the time the pandemic hit and lockdown orders were instituted, in March 2020, we had completed nine in-person oral history interviews. Arthur Ashe's reach was global and not limited to the tennis world, so originally our approach was to focus on narrators stateside and to possibly travel to hubs where we could maximize our time and budget by doing several in-person interviews in one location. With UCLA as our home base, Chinyere on the West Coast and I on the East Coast, our thought was that we would be able to cover a fair amount of geography efficiently. The pandemic put a halt to that, and, like many projects, we reconsidered our next steps with possibly pausing altogether. But what I found when I reached out to the oral history community was that oral historians were taking many paths in response to the pandemic. Some were ending projects, some were pausing, and some were finding new ways to record and stay connected.

We knew that we wanted to continue, but it was imperative to find the safest way to do so. Zoom was already on our radar since we had been using it to conduct meetings between our different locations and time zones. We decided to use Zoom, knowing that although we would not get archival-quality recordings and that the connection gained from in-person interviews would be diminished, it would allow us to continue safely and potentially expand our reach. Zoom was also a user-friendly platform that made it easy to utilize technological skills and comfort levels across a spectrum.

Many of our narrators, contemporaries of Ashe, were retired, and their daily routines were not tied to a computer, so our first task was to help train narrators on these new tools. After reviewing several sample manuals and concluding that they assumed a level of familiarity with computers, Chinyere decided to create a how-to manual from scratch. She utilized both text and images describing how to download, install, and use Zoom.

Pre-interviews became the most vital step in our process. We decided early on that all pre-interviews must be done via Zoom, unlike in the past when a quick phone call would do. These prep sessions not only allowed us to confirm whether narrators had access to a computer but also to verify whether they had a functioning camera and microphone. And since Zoom records video, something we were not collecting before, the pre-interviews allowed us to make suggestions as to where narrators should sit to get the best light or reduce background noise. We were also thankful for the many family members of narrators who served as tech support on the other end, helping narrators navigate the technical aspects of the project. Besides the tech run-through, the biggest benefits of the pre-interview were the levels of comfort and confidence it bestowed on narrators before the formal interview and that it allowed for collaboration on the interview outline.

Although the quality of the Zoom recordings didn't match our usual archival-quality recordings, there were a number of benefits. Our expenses were greatly reduced as a result of transitioning to Zoom, as we were no longer saddled with the travel expenses of in-person interviewing. Also, we were able to maximize our time by completing more interviews in a shorter period of time. In the four months prior to the pandemic, we completed nine interviews, but from April through August of 2020, we tripled that number. We were able to expand our interview list globally, conducting interviews in places that we couldn't consider before. For example, before the pandemic, our ability to document stories of Ashe's historical trip to South Africa in 1973 was limited to the couple narrators who lived in the US, but remote interviewing allowed us to interview South African poet and activist Dr. Don Mattera, he in Johannesburg and I in Maryland. This allowed us to expand our potential in documenting lesser-known stories of Ashe.

Our growing confidence that the project could be sustained by virtual interviews and the merit of the discoveries we were making led us to apply for an Andrew W. Mellon Foundation grant, which we were awarded. The grant helped to propel another year of interviewing and the convening of an advisory board which guided the direction of the project through the pandemic. In the end, we were able to make it through the pandemic. A handful of narrators declined using Zoom, but most were happy to be interviewed in the comfort of their homes. What is not lost on us was the prevalence of loss throughout the project. We found ourselves experiencing the collective loss of the pandemic while asking narrators to reflect on the loss of their friend and loved one, Ashe, who passed away in 1993 amid the HIV/AIDS crisis. A couple of the narrators who agreed to be interviewed passed away before we were able to interview them. This unprecedented, shared grief seeped into the interviews through a candidness and openness that was distinctly different from our early interviews. Chinyere felt the weight of this grief, and I found solace in hearing these stories.

The pandemic has made an indelible imprint on the project, not only in the lingerings of loss but also in our approach. We conducted our first in-person interview a year and a half after the lockdowns began, and we now embrace a hybrid approach, taking advantage of both the quality and connection of in-person interviews but also the reach of remote interviews.

16

ORAL HISTORY AT A DISTANCE

A View from Australia

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In 2020 and 2021, as many oral historians postponed interviews, I conducted three life history projects and began an organizational history project using remote interviewing techniques. The three individual life histories were predominantly audio-only, while the organizational history was designed to produce a video documentary. Each of the private clients involved would have preferred that the interviews be conducted in person. For various reasons, however, they did not want to wait for the uncertainty of the COVID-19 pandemic to resolve. Instead, they generously opted to work with me to see what could be achieved through remote interviewing.

The Life History Projects

Each of the three life history projects involved a single interviewee and four to six interview sessions ranging from about one to two hours per session. In normal circumstances these interviews would have been conducted in person, but government-imposed restrictions due to the COVID-19 pandemic meant this was not possible. In Australia at this time, the government policy was to close national borders and, as much as possible, suppress COVID-19 via lockdowns. This was particularly the case in the state of Victoria, where I live, which has had more COVID-related lockdowns than any other Australian state. The lockdowns involved various stages of severity but at their most strict included measures such as a nightly curfew, a ban on traveling more than five kilometers from home, banning visitors to the home, and closing all but essential retail.

Each of the three projects was commissioned by a family member of the interviewee, and in at least two of the three cases the timing was influenced by

health concerns. My challenges included working out how to utilize emerging remote interviewing technologies whilst also establishing and maintaining trust with the interviewee and ensuring audio quality. The three projects were conducted broadly in sequence, and this offered the opportunity to reassess procedures and technologies at the beginning of each project. Two of the three involved interviewees in regional Victoria, with the third located in a suburb quite close to where I live in the capital city of Melbourne. The end product was a package of lightly edited audio interview files, a summary of each interview session, and automated transcripts.

I had begun trialing remote interviewing before the first interview project was commissioned in September 2020. While there is no substitute for meeting face-to-face, I was confident I could establish an initial trusting relationship with interviewees remotely via telephone or an online communication technology such as Zoom. While a pre-interview is always helpful in establishing rapport and trust in an oral history project, I was aware that this was particularly important in the case of remote interviewing. The issue I judged most challenging was how best to ensure a high quality of audio recording. There were two factors: the device or platform to make the recording, and the microphones used, particularly by the interviewee.

The options considered for recording initially included telephone interviewing, sending an audio recording device to the interviewee, or using a videoconferencing platform such as Zoom. Firstly, I dismissed telephone interviewing because I did not believe it would provide sufficient audio quality, and at that time the technology for telephone recording was not straightforward. I considered sending a simple audio recorder (such as a Zoom H1) to the interviewee, but this would put a burden on the interviewee to make sure the recording worked. Using the Zoom platform was tempting as it had become widely used during the pandemic and therefore was likely to be familiar to interviewees. It offered the capacity to record both audio and video, but the quality was low as the default settings involved file compression. To change those settings put a technical burden on the interviewee that I was reluctant to impose, and, in any event, it still did not provide uncompressed (WAV) recording. It also made me nervous that there was no way to check the recording while the interview was taking place. Recorded files were downloaded to my computer after the Zoom session. What if there was a problem and I did not discover it until after the interview was completed?

After some testing, I settled on using the podcasting platform Zencast, which provided good-quality MP3 recordings under the free plan and WAV recordings under the paid plan. While the interview was underway, I could view the audio waveforms and recording times and thereby be reassured that recording was indeed happening. As well, this platform required a minimal technical burden for the interviewee. Before each interview session I sent a

hyperlink to the interviewee, and after clicking on it the interviewee only needed to enter a couple of settings and the session was ready for recording.

That left the question of microphones. It seemed to me the simplest option was to send a USB microphone to the interviewee by post. A local USB microphone ensured much better audio quality than relying on an in-built computer microphone. This solution meant the interviewee only had to plug the microphone into their computer, and I could talk them through selecting the microphone as an input device and ensuring it was positioned on their desk or table in the best way to pick up their voice. However, even this option had issues due to the pandemic. The first project began during a lockdown when most retail stores were closed. I had to buy the microphone online, and it took two weeks to arrive because of manning restrictions in the postal service and then another week to send to the interviewee.

Due to changes in COVID lockdown arrangements and changing technology, no doubt driven by the circumstances of the pandemic, I reviewed and modified my procedures at the start of each of the three projects. Using Zencastr and a USB microphone supplied to the interviewee were the key elements for all three interview projects. In the first project, the interviews were conducted using audio only. I would send a hyperlink to the interviewee who would click on the link at an agreed time, and after a few audio checks I would begin the interview recording. In the second project, I decided to add a Zoom session to the recording so that the interviewee could see me throughout the interview, thereby strengthening the rapport with the interviewee. This involved starting with a Zoom meeting and, upon entering the Zencastr platform, turning off the audio in Zoom to stop feedback. By the start of the third project, I was able to trial Zencastr's newly developed video-recording feature. Unfortunately, I found the interviewee's internet connection was not stable enough for both high-quality audio and video recording. Although I decided against recording video, I was still able to use the visual interface of Zencastr to keep a visual connection with the interviewee while recording the audio in uncompressed WAV format. In the second and third projects, I also sent the interviewees a remote interviewing guide outlining the technical steps for connecting to the platform for an interview.

In reassessing the remote interviewing setup for each project, I looked at each previous project in terms of the technology used, the technology emerging, and the needs of each interviewee based on their technical expertise. Each project trialed something new, and so it was important to convey to the interviewee that remote interviewing was evolving and that their input was very helpful in these difficult times. My interviewees were very different, but they were all patient and supportive of trialing new techniques. The techniques adopted were also dictated by the COVID-19 restrictions prevailing at the time. This was most volatile in the third project. It began at a time of light

restrictions, so I was able to have an extended getting-to-know-you session with the interviewee in person at the start. After conducting the remote audio interviews, a planned in-person video interview was delayed for a number of months due to another extended COVID-19 lockdown but was eventually held in December 2021.

The Organization History Project

The organizational history project involved a professional society based in the state of New South Wales. The aim was to conduct ten to twelve video interviews with a view to creating both oral history records and a video documentary. While this project was not time sensitive, the organization wanted to proceed if high production values could be achieved. As I was in the state of Victoria and the interviewees were in New South Wales, we decided that the best option was to hire a film production studio in Sydney, and I would interview the interviewees via Zoom on a monitor. At the time we decided on this approach Melbourne had had frequent lockdowns, so it seemed unlikely I could travel for the interviews. As the time approached for the interviews, however, Sydney had a COVID-19 outbreak, and we had to delay the interviews for a number of months.

Ultimately, we held two four-hour interview sessions in November and December 2021. Hiring a studio had the advantage of ensuring that the video and audio recordings were high quality (we recorded in 4K) and that the background was consistent for all interviewees. The cost of this option, however, meant that we were squeezing twelve interviews into eight hours of recording, including setup. This meant that each interview could be no longer than thirty minutes. Although it was still hoped that the interviews could include early life experiences, the tight time frame meant that the interview style needed to be a cross between an open-question oral history approach and a more directed, journalistic approach.

As an interviewer, it was very challenging to conduct six interviews via Zoom in a four-hour block. To achieve rapport with the interviewees, I scheduled pre-interviews of up to an hour each in the week before the recording sessions. These pre-interviews involved a description of my experience and professional background, an overview of the interview process and interview style, and an exploration of some of the key stories each interviewee wanted to tell. I also sent each interviewee a consent form and an interview guide with information about getting to the studio, what to wear, and an outline of the interview subjects. These sessions generally ran longer than the actual interviews but, in my view, were vital for establishing a relationship with each interviewee and ensuring the overall success of the recording sessions.

Conclusion

Overall, the experiences of these four projects gave me confidence that remote interviewing was a reliable and technically feasible option for oral history interviewing, capable of producing recordings of high quality. The key factors to consider included the recording environment at the interviewee's location (particularly provision of a suitable microphone), the recording platform being used, and ensuring rapport with the interviewees through a carefully planned pre-interview process. Since the projects were broadly sequential, I had several opportunities to reassess and refine my processes considering the needs of each interviewee, emerging technologies, and access arrangements that changed due to restrictions related to the COVID-19 pandemic. In future projects I will likely use in-person interviewing if possible, but remote interviewing will certainly be a part of my oral history toolbox.

17

NATIONAL LIFE STORIES

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National Life Stories (NLS) is an oral history fieldwork charity based in the oral history department of the British Library (BL). NLS runs its own projects but also serves as an archival partner for numerous others; combined, this creates one of the largest oral history collections in the world. Prior to the COVID-19 pandemic, all oral histories were conducted in person, and the process of accessioning new interviews relied on face-to-face contact. Soon after the first lockdown in March 2020, we [as NLS and the British Library oral history team and following UK-wide advice from the Oral History Society (OHS)] suspended all face-to-face oral history interviews.

In April 2020, based on research conducted at the start of the pandemic, we issued guidance initially titled “Remote Oral History Interviewing during COVID-19.”¹ The guidance was hosted by the OHS, and updated editions have followed. We recommended delaying interviews that might not be urgent and, alongside technical advice, raised a number of ethical and legal issues, including whether an interview in the midst of a global pandemic might add extra pressure for certain interviewees (and interviewers) struggling to cope. This remained our baseline position, but we knew it would not be possible for all interviewing to stop. This was especially the case for projects with limits on time and/or finances and also for those tasked with documenting the pandemic itself. At the time of writing this case study (May 2022), we have archived remote interviews using a variety of different methods. Unlike in-person interviewing, there remains no single “best practice” approach to remote recording, and different projects have chosen methods based on their technical and financial abilities or constraints.

For NLS projects, we have been using the US-based podcasting program Zencast, which, for reasonable cost, delivers high-quality uncompressed

WAV recordings through a “double-ender” recording, where all audio is recorded locally and then “stitched” into a stereo file. Since early 2021, Zencastr has provided video functionality which allows the interviewer and interviewee to see each other. (Previously we relied on Zoom to run on mute at the same time.) However, we only archive the audio files. Not only is it harder to preserve and make accessible videos at the British Library, but we were wary of the data protection risks of recording someone’s home. Furthermore, we did not think that the videos themselves were likely to provide much interest to researchers and could instead negatively impact upon the dynamics of the interview. In this we remain advocates for audio interviews, even when video can be recorded and stored at ease.

Since 2016 we have had to judge all software we use on whether it is compatible with General Data Protection Regulation (GDPR). This is European Union (EU)-wide data protection legislation, and, despite the UK’s withdrawal from the EU via Brexit, it is still applicable in UK law as UK GDPR. In 2020 the European Union Court of Justice ruled that the US-EU “Privacy Shield,” which allowed data to travel freely between Europe and the US, no longer met the standards of GDPR. Every institution governed by GDPR must now make its own risk-based decision about whether or not to use US-based software services on a case-by-case basis. In this instance the BL decided that use of Zencastr was an “acceptable risk,” as it was crucial for the continuation of our work during the pandemic, and the data would be stored on remote servers for a minimal time period before being deleted.

As built-in computer microphones are generally of poor quality, we purchased USB microphones for interviewers and also for interviewees. We chose the Bumblebee microphone made by Neat, and interviewees receive their microphone by post before forwarding it on to the next interviewee the same way. The added cost of the microphones and their transit has been balanced by savings in interviewer travel costs, although these calculations may differ in a country where distances are further than they are in the UK.

At the time of this writing, NLS interviewers have recorded 635 hours of audio over Zencastr with 51 different interviewees. Interviewing practice has had to change. NLS and partner interviewers have noted how it is easier to conduct a remote interview with someone you already know, or where it is a more focused interview compared to a life story. The shift to remote has also affected the pace and emotional intimacy of the interview, where body language and types of silence are harder to identify and difficult questions harder to ask. Yet the move to remote interviewing has also had a big impact on other aspects of the archival workflow.

The initial setup of remote recording required dedicated time for researching and purchasing equipment, as well as in training interviewers to use new software. We wrote guidance documents for all aspects of the interview and recorded an unboxing video for the USB microphone. Yet beyond

this expected sunk time, we have found that a remote workflow requires far more support from archival staff than in-person interviews. Many processes we had previously front-loaded into oral history projects—such as naming, backing up, and checking the data integrity of files—can no longer be done by interviewers themselves. New tasks such as downloading and “stitching” master files and providing additional technical support also add to the archival workload. Certain aspects of the workflow have required less office involvement as interviewers have become more comfortable with remote interviewing, but questions remain as to whether running concurrent remote projects is as feasible as for in-person projects.

At the start of the COVID-19 pandemic, there were discussions around whether we were entering a “new normal” for oral history, where remote interviewing would become the dominant approach. Our experience suggests otherwise and indicates that many aspects of the in-person interview cannot be replicated at a distance, especially for in-depth interviews and with new interviewees. Yet it is now clear that high-quality remote interviews suitable for archiving can be recorded, and, while we have returned to in-person interviewing, we are still recording remote interviews. Some interviews are entirely online, some are entirely in person, and some use a hybrid approach. Considerations such as the content and scope of the interview, as well as the interpersonal dynamics between the interviewer and the interviewee, will certainly determine which method we use in the future, as will expected changes to UK GDPR. More so, it remains to be seen how an archival workflow forged in a global pandemic will adapt to whatever the post-pandemic world looks like.

Note

- 1 Oral History Society, “Interviewing at a Distance,” updated February 8, 2021, www.ohs.org.uk/covid-19-remote-recording/.

18

THEIRSTORY

How a Visit to the Anne Frank House Resulted in the Creation of an Oral History Platform

Zack Ellis

Founder of TheirStory

Rochester, New York, USA

TheirStory is an end-to-end oral history platform used by universities, museums, libraries, archives, and other nonprofits to streamline the process of remotely recording, transcribing, indexing, preserving, and making accessible the stories of their community members. TheirStory was founded in 2018 in San Francisco and shortly relocated to Rochester, New York, where it is currently based.

Origins of TheirStory

It all started with a very personal story. My grandfather was a Holocaust survivor who died when I was 4 years old. I have no memory of him, and it is my dad's biggest regret that he never recorded his father's stories before he died. I had known this for a while, but I hadn't done anything about it until one day I was in Amsterdam, in the Anne Frank House, in the attic—where a video was playing of Anne's father, Otto. Because he had such a close relationship with Anne but never really knew who she was until after she died and he read her diary, Otto concluded that most parents don't know, really, their children. It hit me: if most parents don't know their kids, how could I know who my parents are? How well did I even know myself?

I decided to start a project recording my parents telling their life stories and my sharing with them things I had never shared before. The problem was, I was living in San Francisco and they were in Rochester, New York. So every few weeks for the next two years, we hopped on a FaceTime call and I recorded the conversation from my computer using QuickTime. During that time, I learned just enough web development to build a private website to host those recordings for my family.

Through that process, I realized there were two main sources of value. The first was that we now had a private space online, owned by my family, where the stories of my parents could be accessible for generations to come. Second, and just as important, was the value of the process itself, of engaging in self-reflection and these open dialogues with my parents, which deepened our relationships and improved our capacity for better communication thereafter. At that point I asked myself, “How can I recreate this experience for others in a way that is relevant and meaningful to them?”

And thus, TheirStory was born.

The “Oral History at a Distance” webinar, held by Baylor University Institute for Oral History on March 31, 2020, was where TheirStory first became widely known in the oral history community. Since then, over seventy institutions have used TheirStory through an annual subscription model with pricing tiers based on usage. TheirStory has become known for not just working with its community of users to cocreate a purpose-built technology platform for the process of oral history, but also for providing strong customer support and training. This also comes from their customer community who supports each other. For example, as of September 2023, new customers are onboarded through an initial training with Alisha Babbstein, the director of collections and exhibitions at the Oregon Jewish Museum and Center for Holocaust Education (OJMCHE). At OJMCHE, over the course of twelve months, Alisha onboarded over thirty volunteer interviewers and recorded almost three hundred oral histories using TheirStory. She offers guidance to new TheirStory customers on not just how to use TheirStory but also best practices for interviewing, project management, and running an oral history program.

Future Plans

One of the key challenges when it comes to oral history is the amount of time it takes to go from collecting an oral history to engaging the public with that narrative. In working with its oral history customers, TheirStory has identified a number of key friction points in the oral history process that, if addressed, can help institutions more quickly and easily make oral histories accessible. Features coming up in TheirStory’s product road map aligned to this goal include enhanced project management capabilities; the ability to edit audio and video files through the transcript similar to how you edit text in a Word document; creation of controlled vocabularies and the ability to do qualitative coding; in-app collaboration and commenting at the level of the transcript; an iFrame-embeddable video player; bulk uploading and exporting of files and metadata (including deeds of gift); additional integrations with commonly used preservation and access systems (including social media); and the use of AI for automatic summarization, named entity recognition, identification of subjects and keywords, and semantic search.

A Final Note from Zack

Having studied bioengineering and worked in startups my whole career, I could never have imagined finding a home in the oral history community. I have felt nothing but welcomed, which comes as no surprise to me given the decades of practice oral historians have in creating safe spaces for people to share their stories of challenges, triumphs, and identity.

COVID-19 brought about an era where video has become the dominant form of communication. As a result, we're drowning in information, and yet vital information is being lost. We're more connected than ever before through the internet and social media, and yet we're more polarized and starving for authenticity and belonging.

The best uses of technology I have seen have been in service of amplifying human relationships. During this time of uncertainty through the pandemic, social justice movements, and AI, what excites me most about working on TheirStory is the potential to partner with a community deeply grounded in ethics and communication that puts the rights and wishes of the narrator at the center. If we are able to democratize access to the process and best practices of oral history, I believe we can empower future generations with fundamental human skills while truly making the world a more empathetic and just place.

SECTION III

“Oral History at a Distance” Webinar Survey

“Oral History at a Distance” Webinar Survey—Quantitative Results

On March 31, 2020, the Institute for Oral History held an online webinar, “Oral History at a Distance: Conducting Remote Interviews,” cosponsored by the Oral History Association. Approximately two years after that webinar, the original participants were surveyed regarding their experiences with distance oral history work. Active from April 11 to May 6, 2022, this survey gathered sixty-eight responses from original attendees. Below are some of the results from that survey. The full report is available at the *Oral History at a Distance* companion website: library.web.baylor.edu/oralhistoryatadistance.

Q1. What best describes the state of your oral history project(s) since March 2020?

	<i>Number of Responses (out of 66)</i>	<i>Percent of Responses (out of 100%)</i>
Continued with in-person interviews as originally planned	2	3.03%
Continued, but with adaptations to include some remote interviews	25	38.88%
Continued, but all interviews converted to remote	32	48.48%
Paused until the return of in-person interviews	7	10.61%

Q2. What changes, if any, did remote interviewing bring to the format of your oral histories?

	<i>Number of Responses (out of 53)</i>	<i>Percent of Responses (out of 100%)</i>
Planned audio interviews remained audio	20	37.74%
Planned video interviews remained video	14	26.42%
Planned audio interviews became video	15	28.30%
Planned video interviews became audio	4	7.55%

Q3. Regarding availability of interviewees, how many of the following statements is true?

	<i>Number of Responses (out of 68)</i>	<i>Percent of Responses (out of 100%)</i>
Remote interviewing allowed us to interview previously unplanned interviewees	38	55.88%
We were unable to interview certain individuals because of remote interview hesitancy	20	29.41%
Our interview opportunities did not change	10	14.71%

Q4. Have you conducted any remote interviews since the arrival of the pandemic?

	<i>Number of Responses (out of 68)</i>	<i>Percent of Responses (out of 100%)</i>
Yes	59	86.76%
No	9	13.24%

Q5. What type(s) of remote interviews have you conducted?

	<i>Number of Responses (out of 93)</i>
Telephone (landline)	13
Cell phone	10
Computer (audio only)	25
Computer (video)	43
Other	2

Q7. Considering the remote interviewing incorporated into your project, would you say that you conducted *more, roughly the same number, or fewer interviews* than originally planned?

	<i>Number of Responses (out of 55)</i>	<i>Percent of Responses (out of 100%)</i>
More interviews total	22	40.00%
Roughly the same number	15	27.27%
Fewer interviews total	16	29.09%
N/A	2	3.64%

Q8. Did you use new technology that required adapting preservation processes for the resulting recordings?

	<i>Number of Responses (out of 54)</i>	<i>Percent of Responses (out of 100%)</i>
Yes	31	57.41%
No	23	42.59%

Q9. How easy was it to learn/incorporate new preservation processes into your established workflow?

	<i>Number of Responses (out of 29)</i>	<i>Percent of Responses (out of 100%)</i>
Extremely Easy	8	27.59%
Somewhat Easy	12	41.38%
Neither Easy nor Difficult	5	17.24%
Somewhat Difficult	4	13.79%
Extremely Difficult	0	0%

Q10. My institution provided necessary support for said technology or the preservation/access of new file types.

	<i>Number of Responses (out of 28)</i>	<i>Percent of Responses (out of 100%)</i>
Strongly Agree	8	28.57%
Somewhat Agree	6	21.43%
Neither Agree nor Disagree	5	17.86%
Somewhat Disagree	2	7.14%
Strongly Disagree	4	14.29%
Not Institutionally Based (N/A)	3	10.71%

Q12. As in-person interviews have become more viable again, do you plan to continue to incorporate remote interview options?

	<i>Number of Responses (out of 53)</i>	<i>Percent of Responses (out of 100%)</i>
Primarily conduct in-person interviews	10	18.87%
Conduct both in-person and remote interviews	33	62.26%
Primarily conduct remote interviews	3	5.66%
Unsure	4	7.55%
Project complete (N/A)	3	5.66%

Q34. Do you see the shift to remote oral history during the pandemic having a lasting impact on oral history practice?

	<i>Number of Responses (out of 53)</i>	<i>Percent of Responses (out of 100%)</i>
Yes	31	58.49%
Maybe	20	37.74%
No	2	3.77%

Q36. Did the pandemic influence your understanding of ethics when it comes to oral history?

	<i>Number of Responses (out of 49)</i>	<i>Percent of Responses (out of 100)</i>
Definitely Yes	10	20.41%
Probably Yes	21	42.86%
Probably Not	14	28.57%
Definitely Not	4	8.16%

Q37. Did shifts to remote recording have a significant effect on your project design (planning for your oral history project)?

	<i>Number of Responses (out of 50)</i>	<i>Percent of Responses (out of 100%)</i>
Yes	25	50%
No	25	50%

Q41. Did the pandemic influence how you chose or prioritized narrators for your project?

	<i>Number of Responses (out of 49)</i>	<i>Percent of Responses (out of 100%)</i>
Yes	31	63.27%
No	18	36.73%

Q45. Do you think conducting oral history online/remotely presented any ethical challenges for your project?

	<i>Number of Responses (out of 48)</i>	<i>Percent of Responses (out of 100%)</i>
Yes	17	35.42%
No	31	64.58%

Q41. Which of the following best characterizes your oral history project(s) conducted remotely?

	<i>Number of Responses (out of 49)</i>	<i>Percent of Responses (out of 100%)</i>
Solo Effort	15	30.61%
Team Effort	34	69.39%

Q45. Did problems arise with team members with regard to productivity?

	<i>Number of Responses (out of 29)</i>	<i>Percent of Responses (out of 100%)</i>
Yes	9	31.03%
No	20	68.97%

Q47. In managing a remote project, what new roles, if any, needed to be filled?

	<i>Number of Responses (out of 28)</i>	<i>Percent of Responses (out of 100%)</i>
No New Roles	23	82.14%
New Roles	5	17.86%



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SECTION IV

Appendix



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19

SAMPLE PROJECT DESIGN

Civil Rights in Waco, Texas: Documenting the Voices of the Movement, Mid-1950s–Early 1960s

When we hear about the civil rights movement, we often think of places like Montgomery, Alabama; Memphis, Tennessee; Atlanta, Georgia; and Little Rock, Arkansas. We don't often look at what happened in our own communities. To commemorate the sixtieth anniversary of the Civil Rights Act of 1964, this project is focused on gathering oral histories of those who participated in protests, sit-ins, and other demonstrations in Waco, Texas.

An additional goal is to highlight everyday voices in this community and share the stories of how participating in these activities shaped their lives and careers. An understanding of the stories of those who participated will hopefully inspire present and future generations to continue the fight for equality and contribute new information on an important era in history in an area that is often overlooked.

The project will gather the stories of key activists, organizers, and participants involved in protests, sit-ins, and other demonstrations from the mid-1950s to early 1960s. Not many records on these activities exist except for a few newspaper clippings and photographs. An interview project exploring this history through the viewpoints of former participants will bring to light this history on a local level and fill in gaps present in local history archives. This project will follow the Principles and Best Practices of the Oral History Association.

Fortunately, some participants are still living who can share their experiences with us. For those who live in or within one hundred miles of Waco, Texas, travel will be arranged to conduct in-person interviews. For those who live outside of the one-hundred-mile radius, or have a need or preference for distance interviewing, remote interviews will be conducted using the Zoom platform to collect their stories. Focus will be given to those who helped

organize and participated in these protests, with priority given to those who may be at risk due to age or health. The project will then turn its focus towards those who witnessed the protests and sit-ins. If we are unable to locate enough narrators, we plan to extend our project geographically to the county level (McLennan County) and then to the region of Central Texas, if necessary.

The interviews will be transcribed, and the recordings and transcripts will be archived with the Baylor University Institute for Oral History, which will provide public access to the oral histories. On completion of the interviews, all narrators will receive a copy of their recording and transcript in digital format.

Among the ways the project plans to commemorate this history will be an online exhibit using photographs and excerpts from the oral history interviews gathered. Future plans include a web page devoted to this history including excerpts from narrator testimony. Plans are in the works to create educational K–12 material based on these stories to share with local school districts and libraries.

Planning, training, and acquiring equipment are underway. The first major phase of the project—conducting background research and recording and transcribing interviews—is scheduled to start in December 2024 and conclude in March 2025. The second round of interviewing and transcribing will continue from March 2025 to July 2025. The period of July 2025 to September 2025 will be devoted to creating the online exhibit for the commemoration ceremony.

20

SAMPLE MEMORANDUM OF UNDERSTANDING

Memorandum of Understanding for Texas Oral History Association and Baylor University Institute for Oral History

Project Period: June 1, 2025 to May 31, 2026

1. Baylor University Institute for Oral History (BUIOH) and Texas Oral History Association (TOHA) have reached a cordial partnership with the goal of BUIOH supporting TOHA's research by training, advising on, processing, and archiving TOHA's oral history project titled "Talking Texans: Oral History around the State."
2. BUIOH agrees to:
 - provide \$2,500 in funding to support the project "Talking Texans: Oral History around the State." The funds will be distributed in two payments: \$1,250 after the training workshop and \$1,250 after approximately seven interviews have been submitted;
 - conduct a training workshop in oral history research for project volunteers;
 - loan two digital audio recorders to the project for conducting oral history interviews;
 - review the first round of audio interviews to provide feedback to interviewers;
 - consult with project organizers and volunteers throughout the project;
 - process, duplicate, and transcribe approximately fifteen audio oral history recordings;
 - furnish each narrator a draft transcript for his or her review;
 - furnish each narrator a copy of his or her final memoir;
 - make the oral history transcripts and audio recordings accessible online;

- and assist in preserving this research through co-depositing the recordings and transcripts at Baylor University and at the Texas State Library.

3. TOHA agrees to:

- arrange a day, time, and place for a training/planning workshop;
 - assemble for the training workshop several persons who are committed to doing the interviews;
 - use an interview release agreement for the project which each narrator signs, preserving their research by co-depositing the interview at Baylor University and TOHA;
 - manage digital audio recording equipment;
 - locate and contact narrators;
 - arrange interview days, times, and places;
 - conduct approximately fifteen recorded interviews;
 - create a word list of proper nouns and unique spellings for each interview;
 - use a biographical data form to gather information on each narrator;
 - submit original recordings and accompanying forms (signed release agreements, interview data sheets, biographical data forms, word lists, notes) to BUIOH in a timely fashion (all materials must be submitted by May 31, 2026);
 - plan, arrange, publicize, and carry through a public program to share the outcomes of the project with the community;
 - return all borrowed equipment and supplies following the final project interview;
 - and complete a final report and evaluation of the project by May 31, 2026.
4. All steps and procedures during this project will be in accordance with the Principles and Best Practices of the Oral History Association (www.oralhistory.org/principles-and-best-practices-revised-2018/), the world's largest body of professional oral historians.
5. We the undersigned so hereby agree to the principles outlined in the proposal related to TOHA's "Talking Texans: Oral History around the State" project dated April 24, 2025.

John Smith
President
Texas Oral History Association
Waco, TX

Adrienne A. Cain Darough
Assistant Director
Institute for Oral History
Baylor University
Waco, TX

Jane Doe
Secretary-Treasurer
Texas Oral History Association
Waco, TX

21

BUIOH COST SCHEDULE FOR ORAL HISTORY INTERVIEWING AND PROCESSING

cost estimate based upon a one-hour interview—does not include travel

Undergraduate student pay rate = \$10/hour

Graduate student pay rate = \$15/hour

Interviewer/staff pay rate = \$25/hour

A. Pre-Interview

Pre-Interview Research/Other Tasks: 4 hours @ \$25/hour \$100

Pre-Interview Visit: 1 hour @ \$25/hour \$25

B. Interview

\$100 per recorded hour (professional contract rate) \$100

C. Draft Transcript Processing

Staff Editorial Oversight: 2 hours @ \$25/hour \$50

Tasks:

Receiving/Verifying Contents: 1 hour @ \$25/hour \$25

Processing Audio & Files: 1 hour @ \$10/hour \$10

Transcribing: 5 hours per audio hour @ \$10/hour \$50

Audit Checking: 2 hours per audio hour @ \$15/hour \$30

Editing: 3 hours per audio hour @ \$15/hour \$45

204 BUIOH Cost Schedule for Oral History Interviewing and Processing

Abstracting: 1 hour per audio hour @ \$15/hour \$15

Interviewer/ee Review Handling: 1 hour @ \$25/hour \$25

- Printing: 15 cents per page (est. 33 pages/hour) x2 *\$10
- Postage: (mailing draft transcript to narrator/interviewer) *\$10

Interviewer Transcript Review: 2 hours per audio hour @ \$25/hour \$50

Corrections Entered: 2 hours per audio hour @ \$15/hour \$30

Online Transcript/Audio Inclusion: 1 hour @ \$25/hour \$25

D. Final Transcript Processing

Final Editing: 3 hours per audio hour @ \$25/hour \$75

Online Transcript Finalization: 1 hour @ \$25/hour \$25

Volume Production: 2 hours @ \$25/hour \$50

- Photocopying: 15 cents per page (est. 33 pages/hour) *\$5
- Binding per volume *\$25
- Postage per volume (to/from bindery and to narrator) *\$20

Total Estimate for One-Hour Interview \$800

Further Considerations

Interviewer pay varies widely, depending on the range of tasks and responsibilities interviewers are expected to fulfill. Among these are the following:

- Background research prior to the interview, and/or during the progress of an interview series.
- Locating and contacting narrators, securing an interview location, handling other logistical arrangements.
- Video and/or audio setup and recording.
- Processing after the interview:
 1. Word list (guide to terms, names, etc., including spelling and/or special meanings and contexts).
 2. Audio and/or video file management, including copying, reformatting (as for creation of CDs, DVDs, etc.), and transmission.
 3. Transcribing—rough draft, audit-check, edit, narrator review, etc.
 4. Abstracts, time logs, indices, other guides and finding aids.

Pay basis can vary widely as well. It can be by the hour of actual interviewing time (especially if the interviewer is hired only to conduct the interview), with or without further compensation for additional tasks.

Interview duration can also vary widely, although sixty to ninety minutes may generally be considered typical. A narrator's stamina and degree

of engagement, the breadth and depth of the subjects to be covered in the interview, whether multiple interviews are planned—to name but a few of the possible factors—can all affect how long the interview can or should last.

*For remote interviews, consider how these elements could be provided via electronic delivery methods. By providing digital delivery, the costs for postage, printing, binding, and photocopying can be greatly reduced or eliminated.

Estimate of Total Hours Spent (Local Interview Range)

Pre-Interview Research/Tasks: 4–8

Interview: 2 for site-based, 8 for local travel

Processing/Transcription: 15–20

Review: 2 for interviewer (narrator not billed but 1-month time consideration allowed)

Post-Review Edits: 5

Final Editing: 5 (allow 1–2 months for outside business to bind volumes)

Total: 33–48 man-hours (+2–3 months wait time for materials)

22

BUIOH INTERVIEWER DEED-OF-GIFT AGREEMENT

This document governs the use of materials generated from oral history interviews conducted by or for Baylor University Institute for Oral History (BUIOH).

The purpose of BUIOH is to gather and preserve historical documents by means of the recorded interview. The recorded interview, either audio and/or video, consists of a series of topics and questions asked to gain perspective on historical events, eras, or experiences. Recordings and transcripts resulting from such interviews become part of the oral history collections of Baylor University and are made available for academic research, for nonprofit educational purposes, and for public dissemination including the internet. The interviews are preserved by Baylor University to ensure future use by scholars and researchers. A copy of the interview can be provided to the interviewee upon request.

INTERVIEWER DEED OF GIFT

1. I have read the above and understand that the recordings and transcripts resulting from this interview or series will become part of the oral history collections of Baylor University, where they will be preserved and made available for historical and other academic research, for nonprofit educational purposes, and for public dissemination, which includes online resources.
2. I hereby donate and convey my interview to Baylor University for scholarly purposes as the university sees fit. Baylor University obtains exclusive rights of reproduction, distribution, and preparation of derivative works. Future uses may include, but are not limited to, the following:

- printed memoirs, written publications, radio and film productions, educational tools, and public performances. Many of these future uses may be accessible through BUIOH's online and social media platforms. With this donation, I understand that I am conveying all rights, title, and interest in copyright to Baylor University. In return, Baylor University agrees that I may use the information contained in my interview during my lifetime.
3. I hereby transfer to Baylor University legal title and all literary property rights, including copyright, to my portion of the recordings of oral history interviews I conduct for Baylor University. In turn, Baylor University agrees that I shall have a lifetime nonexclusive license to use information contained in the recordings and transcripts from interviews I conduct for Baylor University.
 4. I understand that participation in BUIOH's oral history project is entirely voluntary and that as a participant I have the right to withdraw from the interview process at any time.
 5. I authorize Baylor University to use my name, likeness, and/or photographs in connection with the use and promotion of this interview and the oral history program.

_____ Date _____

Interviewer (signature)

Name of Interviewer (typed or printed)

If you have any questions regarding your rights as a participant or have other questions regarding this research, please contact Dr. Stephen M. Sloan, Director, Baylor University Institute for Oral History, One Bear Place #97271, Waco, Texas 76798-7271, (254) 710-6290.

23

BUIOH INTERVIEWEE DEED-OF-GIFT AGREEMENT

This document regulates the use of materials generated from oral history interviews conducted by or for Baylor University Institute for Oral History (BUIOH).

The purpose of BUIOH is to gather and preserve historical documents by means of the recorded interview. The recorded interview, either audio and/or video, consists of a series of topics and questions asked to gain perspective on historical events, eras, or experiences. Recordings and transcripts resulting from such interviews become part of the oral history collections of Baylor University and are made available for academic research, for nonprofit educational purposes, and for public dissemination including the internet. The interviews are preserved by Baylor University to ensure future use by scholars and researchers. A copy of the interview can be provided to the interviewee upon request.

INTERVIEWEE DEED OF GIFT

1. I have read the above and understand that the recordings and transcripts resulting from this interview or series will become part of the oral history collections of Baylor University, where they will be preserved and made available for historical and other academic research, for nonprofit educational purposes, and for public dissemination, which includes online resources.
2. I hereby donate and convey my interview to Baylor University for scholarly purposes as the university sees fit. Baylor University obtains exclusive rights of reproduction, distribution, and preparation of derivative works. Future uses may include, but are not limited to, the following:

- printed memoirs, written publications, radio and film productions, educational tools, and public performances. Many of these future uses may be accessible through BUIOH's online and social media platforms. With this donation, I understand that I am conveying all rights, title, and interest in copyright to Baylor University. In return, Baylor University agrees that I may use the information contained in my interview during my lifetime.
3. I understand that participation in BUIOH's oral history project is entirely voluntary and that as a participant I have the right to withdraw from the interview process at any time. As a participant, I also have the right to refuse to answer certain questions or to discuss certain topics. Once the interview has concluded, I may exercise my right to review the interview if desired.
 4. I authorize Baylor University to use my name, likeness, and/or photographs in connection with the use and promotion of this interview and the oral history program.

I have read and thoroughly understand my role in this process, the role of Baylor University Institute for Oral History, and my rights as an interviewee.

Interviewee (signature)

Date

Name of Interviewee (typed or printed)

If you have any additional questions regarding your rights as a participant or have other questions regarding this research, please contact Dr. Stephen M. Sloan, Director, Baylor University Institute for Oral History, One Bear Place #97271, Waco, Texas 76798-7271, (254) 710-6290.

24

BUIOH RESTRICTED INTERVIEWEE DEED-OF-GIFT AGREEMENT

This document regulates the use of materials generated from oral history interviews conducted by or for the Baylor University Institute for Oral History (BUIOH).

The purpose of BUIOH is to gather and preserve historical documents by means of the recorded interview. The recorded interview, either audio and/or video, consists of a series of topics and questions asked to gain perspective on historical events, eras, or experiences. Recordings and transcripts resulting from such interviews become part of the oral history collections of Baylor University and are made available for academic research, for nonprofit educational purposes, and for public dissemination including the internet. Baylor University preserves the interviews to ensure future use by scholars and researchers. BUIOH can provide a copy of the interview to the interviewee upon request.

INTERVIEWEE DEED OF GIFT—WITH RESTRICTIONS

1. I have read the above and understand that the recordings and transcripts resulting from this interview or series will become part of the oral history collections of Baylor University, where they will be preserved and made available for historical and other academic research, for nonprofit educational purposes, and for public dissemination, which includes online resources.
2. I hereby donate and convey my interview to Baylor University for scholarly purposes as the university sees fit. Baylor University obtains exclusive rights of reproduction, distribution, and preparation of derivative works. Future uses may include, but are not limited to, the following: printed

memoirs, written publications, radio and film productions, educational tools, and public performances. Many of these future uses may be accessible through BUIOH's online and social media platforms, *with only the following restriction(s)*: (Attach additional sheet if necessary.)

The restriction(s) listed shall remain in force until _____

_____.

(month/day/year)

With this donation, I understand that I am conveying all rights, title, and interest in copyright to Baylor University. In return, Baylor University agrees that I may use the information contained in my interview during my lifetime.

3. I understand that Baylor University will take all reasonable legal steps to uphold the restriction(s) listed above; however, I acknowledge that Baylor University may not be able to uphold my restriction(s) against a subpoena.
4. I understand that participation in BUIOH's oral history project is entirely voluntary and that as a participant I have the right to withdraw from the interview process at any time. As a participant, I also have the right to refuse to answer certain questions or to discuss certain topics. Once the interview has concluded, I may exercise my right to review the interview if desired.
5. I authorize Baylor University to use my name, likeness, and/or photographs in connection with the use and promotion of this interview and the oral history program.

I have read and thoroughly understand my role in this process, the role of Baylor University Institute for Oral History, and my rights as an interviewee.

 Interviewee (signature) Date

 Name of Interviewee (typed or printed)

If you have any additional questions regarding your rights as a participant or have other questions regarding this research, please contact Dr. Stephen M. Sloan, Director, Baylor University Institute for Oral History, One Bear Place #97271, Waco, Texas 76798-7271, (254) 710-6290.

25

SAMPLE BUIOH INTERVIEW ABSTRACT

Interviewee(s):	Fred C. Bryant
Interviewer(s):	Stephen M. Sloan
Collection:	Special
Project:	Making It Work: The Life and Legacy of Robert East
Interview #:	1
Interview date:	May 26, 2022
Interview location:	remote interview recorded in Waco, Texas
Recording medium; duration:	video conference interview—Zoom; 1.80 hr.

Abstract

Fred C. Bryant was the retired executive director [1996–2016] of the Caesar Kleberg Wildlife Research Institute [CKWRI] and served as an advisor to the East Foundation for nearly a decade; growing up near San Antonio, his grandfather’s love of horses and hunting, attending high school 00:00:59; attending Texas Tech University 00:02:18; limited involvement with FFA in high school 00:03:41; bottle feeding orphaned Angora goats for his grandfather 00:04:08; developing love of hunting from his grandfather, seeing no conflict between hunting and conservation 00:05:29; knowing in high school he wanted a career in the outdoors, majoring in wildlife management at Texas Tech 00:07:17; why he chose an academic path 00:09:35; his strong belief in doing applied research 00:10:45; applying to master’s programs, getting into wildlife biology program at Utah State University 00:13:15; studying wild turkey population north of Zion National Park 00:16:19; working for rancher in exchange for horse 00:18:13; takeaways

from his research in Utah |00:19:23|; professor at Utah State recommending him for PhD program at Texas A&M University |00:21:03|; his interest in intersection of range and wildlife management |00:22:42|; working at Sonora Experiment Station as a doctoral student at A&M |00:23:45|; his PhD dissertation research regarding white-tailed deer |00:26:03|; applying for academic positions after earning PhD |00:28:45|; accepting a professorship at Texas Tech |00:30:55|; participating in animal management grant through Texas Tech, building experiment station in Peru, Texas Tech pulling out of Peru due to terrorist attacks |00:32:44|; research and teaching at Texas Tech |00:38:55|; taking students on field trip to Vermejo Park Ranch |00:40:32|; how he came to be director at CKWRI |00:41:40|; changing the culture at CKWRI |00:46:01|; potential he saw in CKWRI |00:46:50|; research CKWRI was doing when he took job |00:48:29|; campaign to raise awareness of CKWRI's work |00:48:57|; position as assistant vice provost of research at Texas Tech |00:50:08|; quail research at CKWRI |00:51:21|; getting to know South Texas ranchers |00:53:49|; new landowners' concerns about broader ecosystem |00:57:10|; putting ten-year studies into place at CKWRI |00:58:54|; Robert East's management style |01:02:30|; meeting Robert at anniversary celebration of King Ranch |01:03:40|; funny story he heard about Robert |01:04:16|; more on meeting Robert at anniversary celebration of King Ranch |01:05:50|; attending Robert's funeral |01:08:01|; Caesar Kleberg's influence on Robert |01:11:56|; Ron Davidson asking him to serve as advisor to East Foundation Board of Trustees, advisors butting heads with trustees |01:15:26|; early recommendations that advisors made to trustees, more on advisors butting heads with trustees |01:19:57|; Bryan Wagner joining East Foundation Board of Directors |01:25:51|; hiring of Neal Wilkins as president and CEO of East Foundation |01:30:23|; serving on East Foundation's Professional Advisors Group under Wilkins |01:32:00|; blend of wildlife and range management in East Foundation's mission |01:33:00|; Behind the Gates educational program |01:36:33|; thoughts on increasing specialization in academia |01:38:01|; reflecting upon his career and friendships |01:41:48|; his relocation plans |01:44:08|; borrowing an outhouse during his master's program |01:44:41|; wrapping up interview |01:46:42|.

26

SAMPLE BUIOH INTERVIEW AUDIO LOG

Interviewee(s):	Eddie Coker
Interviewer(s):	Andrea Parker
Collection:	War and Society
Project (where applicable):	Vietnam War
Interview #:	1
Interview date:	November 27, 2017
Interview location:	Waco, Texas
Recording medium; duration:	digital audio file; 1.57 hr.

H/M/S	Topic
00:00:00	introduction
00:01:10	background, joining US Air Force ROTC
00:05:02	getting drafted while a student at Texas A&M University
00:09:26	military training
00:14:00	public perceptions of Vietnam War and cultural upheavals in US
00:18:40	food and diet in the navy, challenges of maintaining weight during war, appendix rupturing, air force chow halls
00:24:48	stealing supplies from the air force
00:26:26	placement testing and preparing to go overseas
00:30:09	military marriages during Vietnam War
00:32:17	training in Coronado, CA
00:35:05	leaving for first tour of duty in Vietnam
00:38:06	various roles on missions, assisting with harassment and interdiction raids

00:41:33	witnessing casualties and dealing with grief and PTSD
00:43:03	responsibility of leading men on foot patrols
00:46:09	telling wife about his PTSD, reflecting on his PTSD in light of what the Vietnamese civilians went through
00:49:17	impact of PTSD on family members
00:51:00	second tour of Vietnam
00:52:48	Chief of Naval Operations Elmo Zumwalt Jr.
00:54:01	Vietnamese fighting tactics
00:55:36	opinion that war was being run in Washington, DC
00:57:56	more on Elmo Zumwalt Jr.
00:59:04	importance for leaders to have trust of those around them, more thoughts about PTSD
01:01:26	dealing with fear in combat, dropping leaflets from plane
01:03:48	leaving third tour early for health reasons, returning to A&M, meeting wife
01:06:10	close call during last patrol in Vietnam
01:07:29	investigating tunnels in Vietnam, watching out for snakes
01:10:48	various temporary duty orders he was assigned
01:12:54	nutrition's effect on PTSD
01:13:53	media coverage, changes in public perception of the Vietnam War
01:16:53	Agent Orange
01:18:50	why PTSD is recognized more with Vietnam War veterans
01:21:09	value of support groups and counseling in dealing with PTSD
01:26:40	continued discussion of impact of wars on veterans and their families
01:30:31	final thoughts on Vietnam War and how wars change those who fight

27

BUIOH TRANSCRIPTION ASSISTANT CONTRACT

Student transcribers employed by Baylor University Institute for Oral History (BUIOH) agree to do the following:

1. Complete designated hours during the workweek.

- Provide BUIOH with a tentative schedule of when you will be working at the start of each semester.
- Let BUIOH know about any new work conflicts. If needed, BUIOH can adjust your hours.
- If you are unable to work during the week, notify the office manager of your unavailability.

2. Correct automated transcripts with accuracy.

- Follow procedures outlined during training, as well as those in the *BUIOH Style Guide*.
- Use the word list if one is provided in the narrator's folder.
- Research and verify spellings of all proper nouns and unfamiliar terms.
- Listen through the audio twice for each transcript.

3. Keep the lab area clean.

- Eating a snack at your workstation is okay. If eating a meal, please do so in the break room.

4. Help us maintain a professional environment.

- Keep non-work-related talking to a minimum while on duty.
- Speak softly. Do not disturb other people working in the office.

- Do not share the content of any restricted interviews we ask you to transcribe. (Remember, you represent Baylor and the BUIOH.)

5. Be accountable with time and productivity.

- Start your time card at the beginning of each pay period, and complete it on time.
- Record all work in your work log. At the end of each pay period, send an electronic copy to the office manager, editor, and senior editor.

I understand the above stated policies and agree to abide by them. I am aware that this list contains policy highlights but that this is not a complete list of all possible examples. I understand that a failure to adhere to any policy can result in a verbal warning, a written warning, or termination based on the severity of the offense. (Student workers are hired on a semester-to-semester basis, and BUIOH reserves the right to renew or not renew their employment.)

Signature

Date

28

BUIOH EQUIPMENT LOAN AGREEMENT

The Institute for Oral History (BUIOH) lends its recording and transcribing equipment on a selected basis to qualified individuals. Borrowers are expected to return the equipment to BUIOH in the same condition in which it was received.

Borrower's name: _____
Address: _____
Phone no.: _____
Project: _____
Email: _____

Equipment	Model No.	Serial No.	Replacement Value

Date borrowed: _____
Date of expected return: _____
Date returned: _____
Received by: _____

29

BUIOH EMAIL TEMPLATE FOR TRANSCRIPT REVIEW REQUEST

Mr./Mrs./Ms./Dr./Rev. [XXX],

Thank you so much for participating in the oral history project about [XXX]. At the link in this email, you will find the transcript and audio file of your interview conducted by [interviewer] in [month and/or year of interview]. Following your interview, the recording was transcribed in our office and then the transcript was checked with the recording. Two people have listened to the recording and logged what they heard to the best of their abilities.

[Insert Box link for mp3 of audio file and PDF of transcript.]

In order to prepare the transcript of your interview for access through the online facilities of the Baylor University Libraries, we need some help from you. *Please review the materials above and reply back to this email with any corrections that we need to make.* As you read/listen through the transcript, please pay close attention to spellings of proper nouns and technical terms. Where parts of the recording were difficult to hear, the transcriber left blank lines or underlined words.

Oral language is seldom as neatly organized as written language. Part of the charm of oral history is that it is unrehearsed and stream of consciousness. Since we will be uploading both the audio file and transcript online, please avoid the temptation of making the transcript read like a polished manuscript with heavy edits. The resulting discrepancies between the audio and transcript would be confusing to the future user.

Your prompt response will enable us to make this interview available to the public in a timely manner. If we have not received your edits within **one month** of the date of this email, we will assume you have no corrections to make and will proceed to finalize the transcript and audio for access.

220 BUIOH Email Template for Transcript Review Request

Thank you for giving your valuable time and effort to oral history. This story is important!

Kindest regards,
[email signature of sender]

INDEX

Note: Page numbers in *italics* indicate a figure on the corresponding page.

- 4K recordings 183
- Abarbanel, Alice 34
- Abdullah, Angham 77
- access/ethics 51–52
- Achenbach, Amy 95
- Adobe Acrobat 55
- African American History Research Center 36–37
- Amazon Web Services 138
- ambient noise, control 125–126
- American Anthropological Association (AAA): “do not harm” notion 41; Statement on Ethics 40
- Americans with Disabilities Act (ADA) 147
- Andrew W. Mellon Foundation grant 178
- Anne Frank House 188
- anthropologists, ethical obligation 40
- Apple App Store (iOS) 121
- archival workflows 131, 186
- archives: discussion 50–51; process 138–139; protocols 107; selection 30–32
- archiving: avoidance 51; long-term archiving 138
- archivist, role 64
- Arthur Ashe Oral History Project (UCLA) 176–179
- artificial intelligence (AI) 189
- audio: benefits 91; functionality 120; indices, creation 63; transmission, allowance 122; waveforms, previewing 181–182
- audio in-person interviews 108
- audio online remote recording environment 114
- audio-only interview 108; telephony 151
- audio recorders 108–109: professional types 118
- audit-checking 67; transcripts, creation 72
- automated transcription services 63
- automatic summarization, AI usage 189
- AVI file type 110
- Babbstein, Alisha 66–67, 172–175, 189
- background noise, reduction 66
- backgrounds, control 127
- bandwidth, remote recording practices 125
- Baylor University Institute for Oral History (BUIOH): *BUIOH Style Guide* 216; cloud-based storage system 50; collection 22; copresent interviews 97; cost schedule 33, 203–205; downloads 140; “Getting Started with Oral History” e-workshop 35; information,

- obtaining 46; materials, submissions 202; materials regulation 208; memorandum of understanding 201–202; naming convention 132; on-site recording studio, building 106; partnership 26, 201; partners, work (facilitation) 149; portable scanner 132; purpose 210; recording elements 136; remote interviewing, building 139; video oral history interview 109–110; WaveLab 135; webcam 120
- bookkeeper, role 64
- Box 60–61
- brainstorming 21
- Breakwell, Glynis 90
- Brown, David H. K. 8
- budget, planning 33–35
- BUIOH Style Guide* (Baylor University Institute for Oral History) 216
- burnout, increase 70
- candor, sensitive topic relationship 96–97
- case studies 157
- ceiling lights, positioning avoidance 121
- cellular phones, flexibility 113
- cellular telephone environment 113–114
- Center for Oral History Research (UCLA) recordings repository 177
- centralized support, role 63
- Centre for Oral History and Digital Storytelling (Concordia University) 42, 51
- Charlton, Thomas L. (photo) 11, 110
- checksums 133–134
- cloud: data storage 115; file sharing 73; storage 138
- cloud-based recording, providing 122
- cloud-based storage system 50
- cloud-based systems, file generation 135
- cloud-recording deletion policy, circumvention 139
- cold storage 138
- collaboration: boundaries, blurring 52; needs 68
- communication: excess 70; management 67–70; styles, range 69
- community: oral history projects, components 30; project buy-in 37
- CompactFlash (CF) cards 130; recording media 109
- computer, role 95–96
- computer screens, distractions 127
- connections, problems 150–151
- conversation: engagement 43; follow-up 47; initiation 64
- copyright: disclaimer, example 54; transfer 53
- COVID-19 pandemic 41, 194, 195: contact concerns 87; navigation 33; occupations, exploration 70; online interviews 86–87; oral history gains 144–145; oral history practitioners, survey 66; projects, technology shifts 148; remote interviews, conducting 192; remote oral history 194; restrictions 182–183; uncertainty/delay environment 144
- Cox, Leonard 88
- Crager, Kelly E. 89–90, 100, 159–161
- Curating Oral Histories* (MacKay) 130
- data: encryption methodology 142; generation 97; reduction 99–100; transmission 125
- Deakin, Hannah 7–8, 95
- deed-of-gift agreement 43, 75–76, 206–209; restricted deed-of-gift agreement 210–211
- “Deindustrialization and the Politics of Our Time” (DePOT) 68, 165–168
- Dhawan, Erica 68–69
- digital divide 125
- digital environment, creation 69
- digital files: naming conventions 132, 132–133; protocols 132
- digital footprint 137
- digital platforms: access levels 140–141; considerations 142
- digital preservation: tools 137–139; workflows 130–131
- digital processing technician, management 62
- digital signature 55, 76, 132, 141
- digital tools, usage 71
- direct current (DC) power cords 109
- distractions 122; reduction 126–127
- Divita, Lorynn 106
- donor agreement 53
- double-ended recording solutions 123–124
- double-ender recording system 114, 186
- Dougherty, Jack 56
- Dunham, Stephen 97
- ecological principles, conflict 7
- Ellis, Zack 170 188–190
- enthusiasm, control 70

- equipment: loan agreement 72, 218;
loan-out forms 73; management
70–71
- expectations: informed consent,
management 44–45; management
77–79
- FaceTime: call 188; platforms 8
- face-to-face contact, absence 94; fieldwork
87; formats 94; interactions, avoidance
93; interview 13; interviewing 84;
meeting 68; scheduling 69; recordings
86, 98; settings 88
- family oral history, legal release form 56
- feedback: cessation, Zoom audio 182;
control 125–126; management
67–70; offering 68; possibility 126
- files: access levels 140–141; attention
80; categories 135–137; checksums
133–134; digital file protocols 132;
exporting 189; fixity 133–134;
formatting conventions 74–75;
generation 135; management 73–77;
naming 74–75; redundancy 133;
sharing 73; transfer paths 135–137
- film production studio, hiring 183
- flexibility, project importance 33
- follow-up questions: methodology 147;
remote difficulty 49
- formatting conventions of files 74–75
- Freund, Alexander 86
- Frey, James 4
- full-digital approach 131, 132
- Fuller, Dan 33, 162–164
- funding agencies, adaptation 145
- future use statement 53
- General Data Protection Regulation
(GDPR) 186, 187
- generalizations, interviewer pushback 83
- Goffman, Erving 93
- Google products 6, 21, 167
- Google Play Store (Android) 121
- Greene, Jean 33, 162–164
- Groves, Robert M. 4
- Hanna, Paul 7, 12
- hard drives 137–138
- hardware: management 70–71;
smartphone application/hardware
121–122
- Hester, Yolanda 66, 67, 176–179
- High, Steven 42, 51, 68, 165–168
- historically black colleges and
universities (HBCUs) 21
- holdings, remote access 23
- Holt, Amanda 100
- home privacy issues 87
- Hughes, Judy 71, 148, 180–184
- human relationships, amplification 190
- hybrid telephone environment 113–114
- iMovie for Mac 122–123
- inclusion, re-imagination 146
- Indigenous educators, approaches/
frameworks 87–88
- Individuals with Disabilities Education
Act (IDEA) 147
- indoor recording 121
- information sessions, hosting 37
- informed consent 42–43, 56;
expectations, management 44–45;
legal release form 52–53
- ingestion point 149
- in-person audio interviews 108;
environments, sets 121; exhibit 32;
creation 54; interviews: materials,
preservation 139; preparation 126;
viability 194; meeting 47; recordings
126; seminars/workshops, plan
changes 33; video interviews 108
- Institute of Museum and Library
Services funding 6, 33, 163
- institution: ethical responsibilities 42
- institutional: project buy-in 37
- Institutional Review Board (IRB), oral
history exemption 56–57
- instruction sheets, usage 72
- internet: connection, requirement 7, 85,
122
- Internet Archive, Wayback Machine 139
- interview-based researchers 6–7
- interviewees: availability 192; concern
40; deed of gift 208–211
- interviewers: deed-of-gift agreement
206–207; environment 87–88;
environment, narrator environment
(contrast) 115; follow-up questions
66; importance 28; management
62; narrators, relationship 77,
84–88; stories, sharing 70; view,
documentation 14
- interviewing: distance 94–99; remote
interviewing kit 116; telephone usage
89–90; videoconferencing 90–93
- interviews: abstract 212–213; concluding
79; conducting 71, 78; conducting
at a distance 94–99; conducting,
challenges 183; cost 203; data forms
73; digital policies 132–137; digital

- tools 137–139; framing 96; in-person audio interview 108; in-person video interview 108; management 65–67; materials, access 141–142; practice interviews 65–66; one-hour interview, total estimate 203–205; oral history, contrast 47–48; pace, increase 98–99; pre-interview, ethics 43; preservation 50–51; process 13; process, ethical concern 40; projected outcomes 32; recordings, length 46; remote interview preservation, considerations 139–142; scheduling 36; serial interviews 99; setup, reimagining 146–152; transcript 219; YouTube posting 52
- Jones, Jacqueline 97
- Kaplan, Anna 96
- landline telephone environment, usage 113–114
- Larson, Mary A. 6
- Lavrakas, Paul J. 5
- LED panels, usage 120
- left/right balance, normalization 109
- legal release forms 50, 52–55, 56
- Library of Congress Folklife Center, repository selection advice 31
- Library of Congress Policy Statements for the Veterans Oral History Project, collections policy 31
- licenses 56
- lighting 120–121; improvement 66
- local recording, providing 122
- LOCKSS 133
- Lo Iacono, Valeria 8
- long-term project, inspiration 69–70
- M4A files 140
- MacDowell, Marsha 9
- machine malfunction 72–73
- MacKay, Nancy 130
- Manitoba Food History Project 78
- materials: collection, projected outcomes 32; preservation 50
- Mattera, Don 178
- Mazé, Elinor 140
- McLuhan, Marshall 88
- Mealer, Meredith 97
- meeting, recap 47
- memorandum of understanding (MOU) 26, sample 201–202
- metadata 134, 135; exporting 189
- methodology: discussion 29; ethical concern 40
- microphones 111, 119: Blue Yeti Pro 152; polar patterns 112; types 109, 111, 112–113
- Microsoft remote workers 20–21
- Microsoft Teams 6
- mixers 118–119
- mobility challenges 61
- “Montreal Life Stories” 68, 165–168
- Moore, Kimberly 78
- Morgan, Charlie 94, 185–187
- MP3 recordings, creation 181–182
- MP4 files 110, 140
- multimedia exhibit, creation 72
- naming conventions 74, 132, 132–133
- narrators: contact 76–77; contextual information 99–100; environment 85–87; environment, interviewer environment contrast 115; finding 36–37; follow-up 47; framing 146; guidance 147; interview 117; interviewers, relationship 77, 84–88; legal release form, presentation timing 55; light sources 121; manual, requirement 67; panic 42–43; photographs 73; project exit, reaction 55–56; representation, ensuring 49; rights list 55; selection 30; selection, pandemic 195; surroundings, control 126–127; technology familiarity 90; tech support 66; temptation, reduction 76; testimony 200; transcripts, examination 76–77; vision impairment, visibility 76
- National Life Stories (NLS) 94, 185–187
- Nwonye, Chinyere 66, 67, 176–179
- Oberhauser, Ann 88
- O’Gieblyn, Meghan 92
- online audio remote recording environment 114
- online database 72
- online exhibits 54
- online interviews 86–87
- online oral history, ethical challenges 195
- online security policies 141–142
- online video interviews, focus 114
- online video remote recording environment 114–115
- on-location recording, oral historian participation 145

- open-ended questions 65
- open-mindedness 48
- open-reel tape 108–109
- oral historians: COVID-19 pandemic
 - 41; slowness, value 98
- oral history: access 51–52; archival workflows 131; audio log 214–215; case studies 157; challenges 189; community, connection 190; conducting, ethical challenges 195; deed-of-gift agreement 206–209; distance oral history, informed consent 42–43; ethics 51–52; factoring, distance considerations 14–15; family oral history, legal release form 56; format, remote interviewing 192; gains 144; inception 108; insights 79; institution/research department requirement 56–57; internal factors 13–14; interviewing/processing, cost schedule 203–205; IRB exemption 56–57; justification, creation 29; landscape change 151–152; long form 90; online security policies 141–142; platform, creation 188; practice, remote oral history 194; practitioners, survey 66; problems 72–73; recordings/transcripts, relationship 208; relational aspect 78; remote approach 12; representation 47–50; restricted deed-of-gift agreement 210–211; results 151–152; team, management 61–67; videography 91; work, challenges 87–88
- Oral History Association (OHA): guidelines 94–95; Principles and Best Practices 41, 47, 63, 199; Remote Interviewing Resources 9, 25, 41, 141
- “Oral History at a Distance: Conducting Remote Interviews” webinar (Baylor University Institute for Oral History) xiii, xv–xvi, xviii–xix1 54, 189
- “Oral History at a Distance” Webinar Survey xiii, xiv, xix1 5, 25, 66, 73, 75, 80, 84, 87, 88, 93, 96, 99, 100–101, 151–152, 154–155, 191–195
- oral history interviews: contrast 47–48; qualities, discussion 83
- Oral History in the Digital Age (OHDA): initiative 6; project 9
- Oral History Metadata Synchronizer (OHMS), advantage 63
- oral history project: accountability 69; cessation, instances 32; community buy-in 37; execution 19; flexibility 33, 130; inspiration 69–70; institutional buy-in 37; institutional sponsorship, ethical responsibilities 42; interview transcript 219; lessons 33; multiple entities, interaction 35–36; narrators, finding 36–37; protection 56; protection, legal release forms 52–55; remote usage, characterization 195; responsibilities, assigning 27; roles 25–27, 61; situations, projects management 78–79; spaces 51–52; state, description 191; subject 219; tasks, assigning 26–27; time frame, estimation 32–33
- Oral History Society (OHS) 77, 185
- Oregon Jewish Museum and Center for Holocaust Education (OJMCHÉ) 172–175, 189
- paper trail 71–73
- participants: distance maintenance (legal release forms) 52–55; onboarding 147
- performance/burnout tradeoff, manager recognition 70
- personal experience/reflections, in-depth account 47–48
- person-to-person call 150–151
- person-to-person interactions 13
- phone-based researchers, approach 97
- Photos for PC 122–123
- physical documents, digitization 72
- post-interview/processing phase 62
- practice interviews 65–66
- pre-interview 43, 75; connection
 - creativity 94–95; conversation, scheduling 66; cost 203; duration 66; ethics, understanding 43; importance 66; opportunity 44; remote recording practices 124–125; remote setting 43–45
- preservation processes adaptation, technology usage 193
- Principles and Best Practices (OHA) 41, 47, 63, 199
- privacy: enhancement 85; policies 141–142
- private data, access 142
- project design 19; need, identification/usage reason 19–21; remote recording shift 194; sample 199–200;

- scope 23, 24, 29–30; statement, construction 28–33
- project director 27: digital copies request 75; management 61
- projected outcomes 32
- project manager: involvement 79; management 61; responsibility emphasis 72
- project narrators: exit, reaction 55–56; legal release form usage discomfort 56
- quality control 73
- questions, interviewer practice 65–66
- QuickTime 124, 188
- Radcliffe College Alumnae Oral History Project 34
- rapid-response oral history 3
- rapport, building 43
- raw media files, preservation 62
- Read, Benjamin L. 99
- real-time translation 147–148
- recording: achievement 78, 97–98; double-ending recording solutions 123–124; elements 136; environments 107; equipment 108–113; impact 85–86; mode 91; options/problems, increase 148–150; progression 99; quality 77; quality problem 123; remote recording environments 113–115; remote recording equipment 118–121; remote recording technology 106; skills, absence 45; technology 89; verification 96; voice-recording app, selection 121
- recruitment process, internet usage 7
- Reed, Harry 89
- Reeves, Troy 44, 169–171
- Rehabilitation Act of 1973 147
- remote follow-up 47
- remote interviewing: attention 96; building 139; incorporation 193; kit 116; reassessment 182–183; shift 151–152
- remote interviews: conducting during pandemic 192; options, incorporation 194; preservation, considerations 139–142; types 192
- remote oral history: ethical challenges 195; external factors 12–13; factoring, distance considerations 14–15; project 61, 87–88; shift 194
- remote projects 12; ethical considerations 40; management 60; management, roles 195; process 144; scheduling challenges 78
- remote recording: bandwidth, availability 125; best practice approach 186; environments 113–115; equipment 118–121; platforms 121–124; practices 124–127; preservation 130; setup 186–187; shift 194; technology 106
- remote relationships 84
- remote setting: pre-interview 43–45; signed legal release form, obtaining 55
- remote video oral history interviews, recording 146
- remote work, respect 150–151
- repository selection, Library of Congress Folklife Center advice 31
- representation 47–50
- researchers: importance 27; management 61–62; remote relationships 84
- research materials, selection 62
- research medium, choice 7
- Riverside.fm 124
- Roach, Kelsey 87–88
- scanning protocols 132
- Secure Digital (SD): cards 130, 137; recording media 109, 110, 118
- security breaching, platform policies 142
- security, increase 85
- Sedgwick, Monique 7
- self-objectification 92
- self-reflection, engagement 189
- self-view window 93
- serial interviews 99
- sessions, local/cloud-based recording 122
- Shenachie Productions 148
- Shuy, Roger 4
- silence, usage 86
- Simpson, Candace 56
- Skype-based interview project 7
- Skype 8, 84; sessions, rapport building 95
- smartphone: application access 113; applications/hardware 121–122; role 95–96
- Smithsonian Archives of American Art Oral History Program, remote kit construction 115

- Snyder, Jennifer 115
 software: delivery 72; digital signature software 141; management 70–71; videoconferencing software 122–123
 solid-state drives 137
 speaker environment 123
 Spiers, Jude 7
 Statement on Ethics (American Anthropological Association) 40
 stereotypes, interviewer pushback 83
 storage devices 137–139
 stories, capture 45
 subject expert: importance 27; management 61–62
 subjects, identification 189
 supplies, cost reduction 76
 Symonds, Paul 8
- Teaff, Grant 84
 team meetings, communication 68–69
 team members: birthdays/anniversaries, compilation 69; compliments/thank-yous, sharing 69; enthusiasm, control 70; milestone updates, encouragement 70; motivation/inspiration 69–70; problems 195; responsibility, project manager emphasis 72; roles 27–28, 61–64
 technical expert, role 62
 technology 77, 89, 193: access levels 140–141; attention 96; comfort, levels 117–118; democratization 144–145; device, role 95–96; emergence 148; malfunction 72–73; notifications, noise 127; proficiency 85–86; remote recording technology 106; setup 117; shifts 148; storage devices 137–139
 technology uses, demonstration 190
 telephone 89–90: adapters/mixers 118–119; landline/cellular/hybrid technology 113–114
 telephone-based distance interview setup 113–114
 telephone-based interviewing 4
 telephone-based interviews 89
 templates, creation 174
 texts, richness 99–100
 TheirStory (end-to-end oral history platform): 67, 124, 169, 170, 171, 173, 174, 188–190
 time frame 145; estimation 32–33
 timekeeping, importance 97–98
 time log submissions 69
- title, selection 28
 Todaro, Julie 95
 topic: research 28–29; selection/research 21–24; sensitive topics, candor 96–97; urgency/necessity 25
 training: management 64–65; roles 65–67; session, scheduling 64–66; user training 72
 transcribers: importance 67; management 62–63; stories, sharing 70
 transcription: assistant contract 216–217; copy uploading 80; personal experience 63; process, time consumption 46; real-time possibilities 148
 transcripts 723; automated transcripts, correction 216; examination 76–77; processing, draft 203; promise, avoidance 45, 46
 transfer paths 135–137
 translation, real-time possibilities 148
 Turner, Patricia 176
- universities, interview process 13
 uploaded material, access maintenance 142
 USB connection 120; connection 135–137; microphones 119, 182; unboxing video, recording 186–187; 118
 users: audio/video transmission, allowance 122; private data, access 142; training 72, 74
 US-EU “Privacy Shield” standards, issue 186
 Utica Roots Oral History Project (Hinds Community College–Utica) 33, 162–164
 UW-Madison Oral History Program 44, 169–171
- video-based platforms 92
 videoconferencing 6–10, 90–93: device, role 95–96; enabling 151; options, increase 145; platform 147–148; setting 93; software 122–123; strength 93; technology 14
 videoconferencing-based interviews 89
 videographer files, editing 46
 video 117–118; benefits 91; in-person interviews 108; online remote recording environment 114–115; oral histories, narrator framing 146;

- recorders 109–111; transmission, allowance 122
- Vietnam Center and Sam Johnson Vietnam Archive (VNCA) 89, 100, 159–161
- virtual business meetings, Harvard Business School study 68
- virtual meeting 150
- virtual platform 99
- visual notifications 127
- Voice over Internet Protocol (VoIP) 91, 119
- voice-recording app, selection 121
- vulnerability, context 97
- vulnerable populations, research considerations 40

- Wakefield, Kelly 7–8, 95
- WaveLab 135
- WAV files 114, 121, 131, 137; format 109; recordings 181–182, 185–186
- Wayback Machine (Internet Archive) 139
- Weathersby Pope, Mary Ellen 84
- webcams 119–120
- web-conferencing platform 115
- website, creation 72
- Weller, Susie 8, 13, 87, 93
- Wi-Fi connections/users 125
- windows/shades, avoidance 121

- word lists 73
- workflows: digital preservation
 - workflows 130–131; office workflow 60; preservation processes, learning/incorporation 193; steps 139–140

- Xbox Game Bar 124
- XLR connector inputs 109, 112; microphone inputs 118

- YouTube, interview posting 52
- Yow, Valerie 21

- Zencast, usage 114, 181–182, 185–186; risk, acceptability 186
- Zoom: account 6, 26, 36, 66, 92, 106, 177; anxiety, concept 48; avoidance 178; cloud-recording deletion policy, circumvention 139; consideration 181; fatigue 48–49; increase 98; interview cancellations 151; interviews 140; monitor 183; mute, usage 186; platform 122, 199; recording files 149; recordings, quality problems 178; usability 123; video-based platform 92; web-conferencing platform 115
- Zoom-based interview 95