

Columbia Obama Oral History Project

Zoom Interview Process

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INTRODUCTION

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

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

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

ROLES AND PROCESS

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

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

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

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

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

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

SETTING UP THE PRE-CALL

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

Email template:

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

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

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

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

Email template:

During your interview, we will record both the audio and video from the Zoom conference (unless, of course, you would prefer not to have the video recorded). When you and I check in before the interview, we can do the following:

- *Walk through setting up testing the USB microphone.*
- *Double check that the internet connection is strong, and the interview conversation will transmit smoothly.*
- *Assess any sources of ambient noise that could disrupt the interview.*
- *Optimize for the best image possible by adjusting placement of the computer's camera, moving potentially distracting background objects, or considering available lighting sources.*
- *Security and privacy of the conversation are a high priority for us. So I'll also provide a password for the Zoom interview when we speak in advance, rather than sending it in an email.*

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

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

SETTING UP THE ZOOM MEETING FOR THE INTERVIEW

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

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

- Enable “join before host”
- Make sure the video is set to automatically turn on
- Set audio to come only from a computer, and not also from a phone
- The start time of the meeting should match the Narrator’s time zone.
- Under advanced options, unclick “Automatically record meeting on local computer”
- When copying and sending the meeting invitation details (or posting them to Google Calendar) REMOVE THE PASSWORD and replace with text that says “Call Host for Password.” Also, alter the meeting link so that the password is not embedded.

- Example:

<https://columbiauniversity.zoom.us/j/789608842?pwd=MWpyOUhzMUtY3hjZzg4MnpUZnA1dz09> (delete everything from the “?pwd” part of the link to the end)

DURING THE PRE-CALL

- **Provide the password** the Narrator needs for the Zoom oral history interview. This can be offered over the phone or by text but cannot be emailed to them. Screen sharing to show the text of the password while telling it to them is also effective.
- **Set up the mic together** and troubleshoot any issues. Do a sound check and make sure the levels sound right and they feel confident with it.
 - Mic should be out of the video shot
 - See [Audio Setup Checklist](#) for what to discuss
- **Walk them through the settings** to have the audio output in Zoom be to their built-in computer speakers rather than the mic (unless they need to wear headphones during the interview, in which case they can plug the 1/8” jack directly into the Yeti Mic, and leave the mic as their output. If they have Bluetooth headphones, they would need to adjust this in their settings as well). It is helpful to share screenshots of this during the conversation or share the screen in Zoom to show the [Audio Setup Checklist](#) document.
- **Listen for any issues** with internet connectivity during the conversation. If there are persistent issues with audio distortion, frozen video streaming, or audio dropping out entirely, then it may be necessary to recommend that the interview not move forward.
- **Talk about their environment.** Would they expect any background noise to arise during their two-hour interview session? Are they in a room with a door that can be closed for privacy? Do they have any pets that would need to be sequestered? Are there other audible sounds from HVAC, refrigerators, lights, or other sources?
- **Provide silence notifications.** Remind them that during the interview, their phone should be silenced, as well as any alert sounds (such as notifications) on their computer.
 - For PC users, here is a [guide](#) to silence notifications
 - For Mac users, here is a [guide](#) to silence notifications
- **Discuss video recording options.** In most cases, the Zoom interview will also record video. Some narrators will opt out of this option, however. Even if the video is not recorded, the interviewer will need to be able to see the narrator clearly. If this isn’t

possible, then it may be necessary to recommend that the interview not move forward as planned.

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

HOSTING THE INTERVIEW

Before Starting

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

Beginning the Interview

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

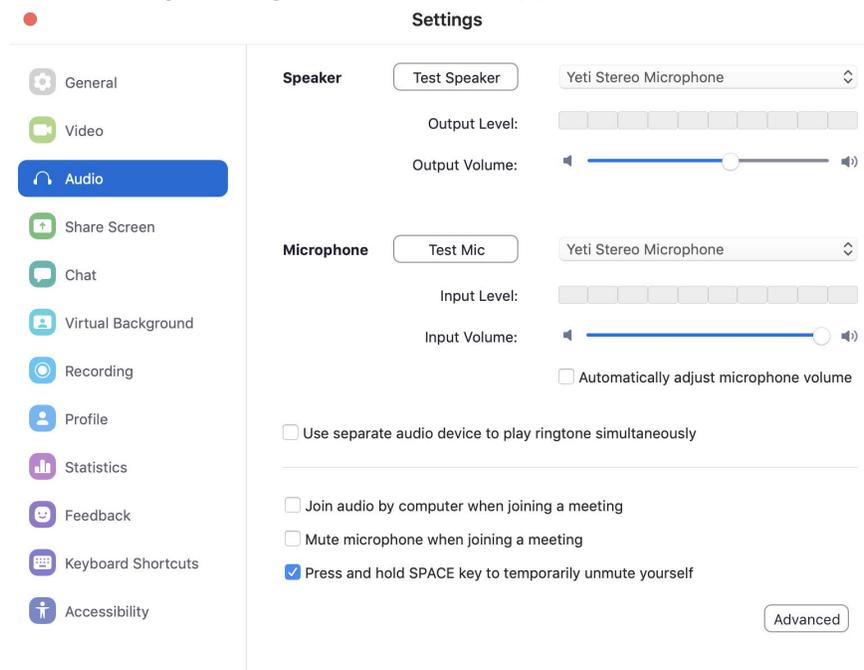
Ending the Interview

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

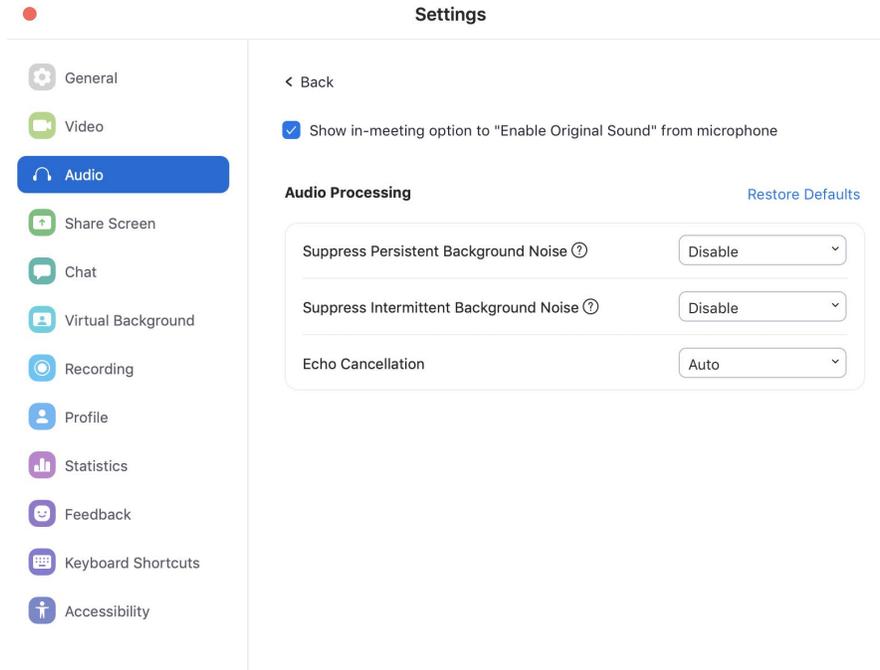
Backup Recording *(in case Zoom recording fails)*

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

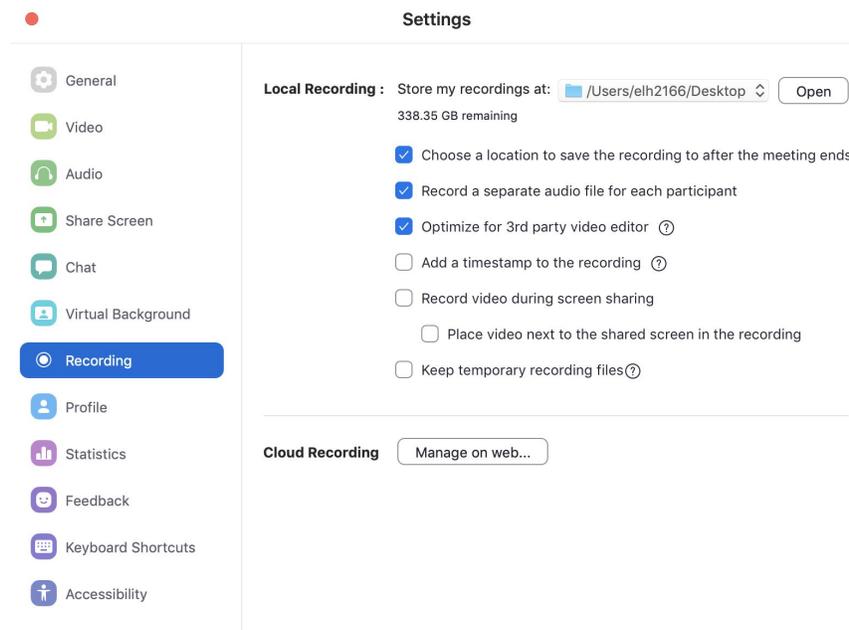
Audio / Video / Recording Settings for the Zoom App



In the settings menu, choose “Audio”. For both “Speaker” and “Microphone” select Yeti Stereo Microphone and adjust output volume to correct level.



Within the Audio tab of the Settings, click on “Advanced.” Enable “Show in-meeting option to ‘Enable Original Sound’ from microphone. Disable “Suppress Persistent Background Noise” and “Suppress Intermittent Background Noise” and make sure “Echo Cancellation” is set to Auto.



In the settings menu, choose “Recording”. Enable “Choose a location to save the recording to after the meeting ends,” “Record a separate audio file for each participant,” and “Optimize for 3rd party video editor.”

PROCESSING FILES

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